

# WORLD CARTONBOARD MARKET OUTLOOK 2030 SPRING 2025



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# Sources & Acknowledgement

In order to create this report (and the accompanying report for Containerboard), interviews were conducted with experts from across the value chain, including Cartonboard mills, converters, brands, retail groups, waste management and other key influencers. These interviews helped provide a comprehensive outlook for the most relevant market dynamics and predicted future trends.

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## **Case Studies / Sources:**

- *McKinsey Packaging Survey (2023)*
- *Two Sides Consumer Trends Report (2023 & 2025)*
- *Pro Carton's European Consumer Trends Report (2023)*
- *Mintel's Packaging Trends Report (2023)*
- *Unilever's Sustainable Living Plan (2023)*
- *The European Green Deal & Circular Economy Action Plan*
- *Amazon's "Frustration-Free Packaging" Initiative*
- *Alibaba's Green Logistics Plan*

The data in this report are from EMGE's proprietary database, compiled from a wide range of sources, including in-house market research, association statistics, trade statistics, company reports and other publicly available data sources. Data are provided on an aggregated basis throughout and confidentiality of company and private data is maintained.

To make this document as easy as possible to use, we summarise the key results in the tables and charts below.



# Definitions & Glossary

## **Definition of Cartonboard**

Cartonboard, also known as paperboard, cardboard or fibreboard, is a thick, rigid material made from multiple layers of compressed paper fibres. It is primarily used for packaging, including the production of cartons, boxes, and various containers. Cartonboard is typically produced through a pulp and paper-making process, where fibres are bonded together to create a strong, durable surface. Its versatility allows it to be used for both lightweight and heavy-duty applications. Made from virgin or recycled fibres, cartonboard is valued for its environmental benefits, as it is biodegradable and widely recycled.

Cartonboard can be coated or uncoated, with coatings like polyethylene or biodegradable alternatives enhancing moisture, grease resistance and printability. It is produced through mechanical and chemical pulping processes, ensuring strength and flexibility for various end-use applications. As a regenerative material, cartonboard is mostly sourced from responsibly managed forests, making it a great choice for protecting and promoting a wide range of consumer goods.

Paper becomes cartonboard when its thickness exceeds 250 microns, or its weight is above 160 grams per square meter (GSM). However, these thresholds can vary depending on industry standards and regional classifications. Some specialised grades of cartonboard, like folding boxboard (FBB) or solid bleached sulphate (SBS), may have additional coatings to enhance printability and performance.

Cartonboard data in this report are based on volumes as sold, measured in metric tonnes.

**DEMAND** is defined as Apparent Consumption, i.e. the volume of Output plus Imports less Exports.

**NET TRADE** is defined as Output less Demand

**OUTPUT** is defined as total Production from manufacturers in one country/region to all world regions.

**CAPACITY** numbers are calculated on a monthly basis, derived from the EMGE global mill and machine database. They take account of changes in capacity (improvements and investments) and are adjusted for monthly variations in availability, but not for market-related downtime, strikes etc.

**OPERATING RATE** is defined as Output as a percentage of Capacity.

## **Glossary**

**Folding Boxboard (FBB):** A type of high-quality cartonboard used for premium packaging, such as for food, cosmetics and pharmaceuticals.

**Solid Bleached Sulphate (SBS/SBB):** A type of high-quality, bleached cartonboard used for luxury and food packaging.

**Recycled Cartonboard (RCB):** Cartonboard made from recycled paper and paperboard fibres.

**Coated Unbleached Kraft (CUK):** A type of coated cartonboard made from unbleached kraft pulp, used for packaging.

**Coated Recycled Board (CRB):** Cartonboard made from recycled fibres and coated for specific performance properties.

**Extended Producer Responsibility (EPR):** Schemes that shift the responsibility for waste management costs and recycling onto packaging producers and brand owners.

**Packaging & Packaging Waste Regulation (PPWR):** Upcoming EU regulation that sets mandatory recycling targets for paper-based packaging (85% by 2030) and introduces eco-modulated fees.

**Single-Use Plastics Directive (SUPD):** European Union directive that bans certain single-use plastic items and promotes alternatives.

**Carbon Border Adjustment Mechanism (CBAM):** EU mechanism that applies carbon taxes on imported high-emission materials, including some paper and board products.

**Food Contact Materials (FCM) Regulation:** EU regulation setting limits on chemical substances in food packaging materials.

**Deforestation-Free Products Regulation (EUDR):** Upcoming EU regulation requiring proof that wood-based products are not linked to illegal deforestation.

**Microfibrillated Cellulose (MFC):** A type of cellulose-based coating that improves barrier properties in cartonboard.

**Post-Consumer Recycled (PCR) Fibre:** Recycled fibres derived from consumer waste, as opposed to pre-consumer waste.

### **Regional Scope**

The global data in this report include (but are not limited to) the following countries:

**WESTERN EUROPE** includes Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK.

**EASTERN EUROPE** includes Albania, Azerbaijan, Belarus, Bosnia & Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Georgia, Greece, Hungary, Iceland, Latvia, Lithuania, Malta, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Ukraine.

**NORTH AMERICA** includes Canada, USA.

**LATIN AMERICA** includes Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Trinidad & Tobago, Uruguay, Venezuela.

**OTHER ASIA / ANZAC (excluding CHINA, JAPAN)** includes Australia, Bangladesh, Cambodia, India, Indonesia, Laos, Malaysia, Mongolia, Myanmar, Nepal, New Zealand, North Korea, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Vietnam.

**AFRICA / MIDDLE EAST** includes Algeria, Angola, Bahrain, Botswana, Cameroon, Egypt, Ethiopia, Ghana, Iran, Iraq, Israel, Ivory Coast, Jordan, Kenya, Kuwait, Lebanon, Libya, Madagascar, Morocco, Namibia, Nigeria, Oman, Qatar, Saudi Arabia, Syria, Senegal, South Africa, Sudan, Tanzania, Tunisia, Turkey, UAE, Uganda, Yemen, Zambia, Zimbabwe.

# Introduction

EMGE is an independent consulting firm with a decades-long history of providing the forest- and fibre-based industries with past, present and forecasts data on supply, demand and pricing. In this, our newest report, we aim to provide a highly-detailed set of forecasts for the Cartonboard market on a global basis.

EMGE's **WORLD CARTONBOARD MARKET OUTLOOK 2030** report provides comprehensive market intelligence, to enable manufacturers, suppliers, investors and policymakers to make informed decisions.

The report gives a completely independent, objective, in-depth industry and market assessment, including an extensive database that breaks down the current situation and the future market outlook for Cartonboard in the major market regions of the world.

Specifically, the database includes forecasts of **Demand, Trade, Output, Capacity** and **Operating Rates**, by year and region, for the period **2025** to **2030**. The report also provides **Individual Country data** for 2024 in all of those same data categories.

In order to assess the impact of consolidation and changing industry structure, the report provides detailed **Leading Manufacturer rankings** by region and globally, including capacity and market shares of the world's largest manufacturers.

In that respect, great care has been taken to assess **Machine Capacity** in detail, based on announced, financed and confirmed plans.

In addition to the extensive industry "hard" data mentioned above, this report also provides in-depth qualitative (or "soft") analysis of a wide range of **market drivers**, to help stakeholders understand the factors shaping the industry's landscape and identify potential opportunities and threats.

These drivers include the growth of e-commerce, technological advancements, regulatory influences and consumer preferences for sustainable packaging, involving rising demand for regenerative materials and the transition away from single-use plastic, as sustainability increasingly influences packaging production and consumption.