

WORLD CARTONBOARD MARKET OUTLOOK 2030 (SPRING 2025)



**EMGE & Co. Ltd.
Chirwyn
Truro
Cornwall
TR3 6LN
United Kingdom**

**Tel: +44 (0)1872 581000
Email: post@emge.com
www.emge.com**



Table of Contents

	Page
Definitions & Glossary	H
Introduction	K
Executive Summary	1
<i>Overview of Key Findings</i>	<i>1</i>
1. Historical / Current Overview	3
1.1. <i>Historical Market Trends</i>	3
1.2. <i>Current Market Landscape - Brands</i>	5
1.3. <i>Current Market Landscape – End-Use Sectors</i>	8
2. Forecast Overview	11
2.1. <i>Global Outlook</i>	11
2.2. <i>Regional Focus: Europe</i>	13
2.3. <i>Regional Focus: North America</i>	16
2.4. <i>Regional Focus: Asia</i>	19
2.5. <i>Regional Focus: China</i>	21
3. Market Drivers & Challenges	25
3.1. <i>Growth in Food & Beverage Packaging</i>	25
3.2. <i>E-Commerce Boom & Cartonboard Demand</i>	26
3.3. <i>Advancements in High-Barrier & Coated Cartonboard</i>	26
3.4. <i>Premium & Luxury Packaging Demand</i>	27
3.5. <i>Recycling & Circular Economy Initiatives</i>	27
3.6. <i>Technological & Production Capacity Expansions</i>	27
3.7. <i>Sustainability & Plastic Substitution</i>	27
3.8. <i>Corporate Sustainability Commitments</i>	28
3.9. <i>Walmart, Mondelēz, Mars, Nestlé Exit U.S. Plastics Pact</i>	28
3.10. <i>Key Challenges</i>	30
4. Competitive Landscape	31
4.1. <i>Major Players in Global Cartonboard Production</i>	31
4.2. <i>Competitive Dynamics & Market Trends</i>	35
4.3. <i>Regional Consolidation & Market Realignment</i>	36
4.4. <i>LEADING MANUFACTURERS – WORLDWIDE</i>	37
4.5. <i>LEADING MANUFACTURERS – EUROPE</i>	40
4.6. <i>LEADING MANUFACTURERS – NORTH AMERICA</i>	41
4.7. <i>LEADING MANUFACTURERS – ASIA</i>	42

Table of Contents (continued)

5. Mergers & Acquisitions	43
5.1. Major Mergers & Acquisitions	43
5.2. Impact of Global Trade Tariffs	45
6. Technological Developments	49
6.1. Smart Packaging & Digital Printing	49
6.2. Technology & Adoption Trends	50
6.3. Fibre Innovation & Lightweighting	50
6.4. Alternative Fibre Sources	50
6.5. Higher Recycled Content Without Strength Loss	51
6.6. Advanced Barrier Coatings for Plastic-Free Solutions	51
6.7. Oxygen & Moisture Barriers for Food Packaging	51
6.8. Compostable & Fully Recyclable Coatings	52
6.9. Digital & AI-Driven Manufacturing Efficiency	52
6.10. Automated Quality Control & Defect Detection	52
6.11. Energy-Efficient & Carbon-Neutral Production	53
6.12. Closed-Loop Water & Waste Management	53
6.13. Carbon Capture & Biodegradable Additives	54
6.14. High-Performance Coatings & Specialty Grades	54
6.15. Luxury, Embossed 3D Paper Packaging Innovations	54
6.16. Challenges & Insights from Industry Players	55
7. Regulatory Framework	57
7.1. Extended Producer Responsibility (EPR) Schemes	57
European Union (EU)	57
Canada & USA	58
India & China	58
7.2. Plastic Reduction & Substitution Policies	58
European Union – Single-Use Plastics Directive (2019)	58
China – 2020 National Plastic Ban	58
USA: State-Level Bans (CA, NY, OR, ME) (2022)	58
India – Single-Use Plastic Ban (2022)	58
7.3. Carbon Emission Reduction & Energy Regulations	59
7.4. Food Contact & Safety Regulations	59
7.5. Deforestation & Sustainable Fibre Sourcing Laws	60
7.6. How Regulations Are Shaping the Future of Cartonboard	60

Table of Contents (continued)

8. Brand & Consumer Insights	61
8.1. <i>Growing Demand for Sustainable Packaging</i>	61
8.2. <i>Preference for Recyclable & Plastic-Free Solutions</i>	62
8.3. <i>Demand for Minimalist & Waste-Reducing Designs</i>	62
8.4. <i>Brand Commitments - Driving the Transition</i>	63
8.5. <i>E-Commerce & Retail Shifting to Cartonboard</i>	64
9. Conclusions	65
10. MARKET FORECASTS	67
10.1. <i>Demand Forecast</i>	67
10.2. <i>Trade Forecast</i>	69
10.3. <i>Production Forecast</i>	70
10.4. <i>Capacity Forecast</i>	72
10.5. <i>Operating Rate Forecast</i>	73
11. COUNTRY DATA	75

List of Figures

	<i>Page</i>
1. <i>Global Market Outlook Summary (2025-2030)</i>	1
2. <i>World Demand (2000-2024)</i>	3
3. <i>Global Demand Growth</i>	4
4. <i>Demand Outlook by Region & Year</i>	11
5. <i>Global Output by Country / Region</i>	12
6. <i>European Demand Volumes by Sub-Grade</i>	13
7. <i>Sub-Grade Shares of European Demand</i>	14
8. <i>USA Output by Sub-Grade</i>	16
9. <i>Sub-Grade Shares of USA Output (2024)</i>	17
10. <i>Indian Demand by Sub-Grade</i>	19
11. <i>Asian Volumes by Furnish (2024)</i>	20
12. <i>Chinese Output by Sub-Grade</i>	21
13. <i>Chinese Output by Furnish</i>	22
14. <i>Historical Chinese Output</i>	24
15. <i>Demand by Region (Historical & Forecast)</i>	25
16. <i>Amazon Online Sales Growth</i>	26
17. <i>Demand vs. Capacity (2025-2030)</i>	31
18. <i>Leading Manufacturers – Europe (Top 10)</i>	32
19. <i>Leading Manufacturers – North America (Top 10)</i>	33
20. <i>Leading Manufacturers – Asia (Top 10)</i>	34
21. <i>Major Machine / Mill Capacity Changes</i>	36
22. <i>Leading Manufacturers Worldwide (Detailed Listings)</i>	37
23. <i>Leading Manufacturers – Europe (Detailed Listings)</i>	40
24. <i>Leading Manufacturers – North America (Detailed Listings)</i>	41
25. <i>Leading Manufacturers – Asia (Detailed Listings)</i>	42
26. <i>Leading Manufacturers – World (Top 10)</i>	43
27. <i>USA Imports by Sub-Grade</i>	45
28. <i>Chinese Cartonboard Net Exports</i>	46
29. <i>Digital Printing Outlook by Application</i>	49
30. <i>Wind & Solar Energy</i>	53
31. <i>Regulatory Changes – Paper Packaging</i>	57
32. <i>Demand Outlook by Region & Year</i>	67
33. <i>Global Demand Outlook by Year</i>	68
34. <i>Demand Outlook by Region</i>	68

List of Figures (continued)

35. Net Trade Outlook by Region & Year	69
36. Net Trade Outlook (2025 vs. 2030)	69
37. Production Outlook by Region & Year	70
38. Global Production Outlook by Year	71
39. Production Outlook by Region	71
40. Capacity Outlook by Region & Year	72
41. Capacity Outlook by Region (2025 vs. 2030)	72
42. Operating Rate Outlook by Region & Year	73
43. Global Operating Rate Outlook by Year	73
44. Country Data (Demand, Output, Capacity & Op.Rates)	75

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 demand and supply. 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.

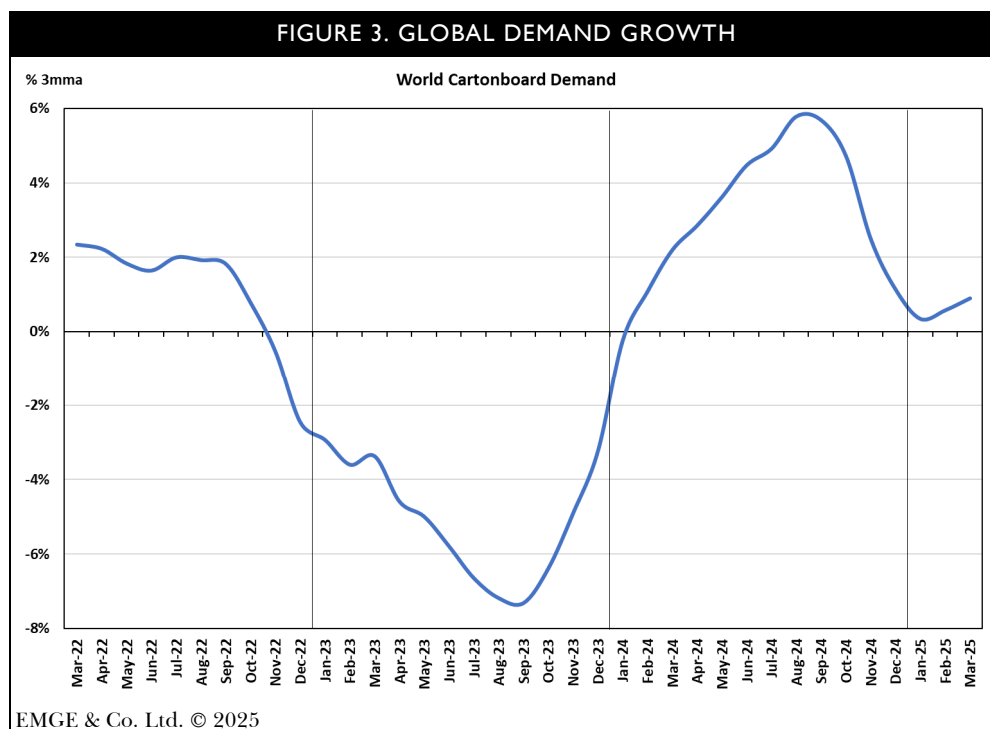
Specifically, the database includes forecasts of **Demand, Trade, Output, Capacity** and **Operating Rates**, by year and region, for the period **2025** to **2030**. The report also provides **Individual Country data** for 2024 in all of those same data categories.

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.



Several factors have slowed the transition from plastic to paper-based packaging over the past five years, however. They include:

- **Cost** - paper-based packaging is often more expensive than plastic alternatives, particularly when requiring barrier coatings for moisture or grease resistance. Higher material and processing costs can deter brands from switching.
- **Performance Limitations** - plastic often offers superior durability, flexibility and barrier properties (e.g. waterproofing and heat sealing) that paper-based materials typically struggle to match without additional treatments, which can reduce wide recyclability.
- **Supply Chain Challenges** - the demand for sustainably sourced paperboard has increased, sometimes leading to shortages or higher costs for raw materials, making large-scale adoption challenging.
- **Regulatory Uncertainty** - while regulations on plastic usage have been tightening, inconsistencies across regions and evolving policies make it challenging for brands to invest confidently in long-term packaging solutions.
- **Consumer Perception & Functionality** - while sustainability is a key concern, consumers also expect convenience, transparency (e.g. clear packaging for some food products) and product protection; areas where plastic often outperforms paper-based alternatives.