WORLD CARTONBOARD MARKET OUTLOOK 2030 (SPRING 2025)

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Table of Contents

Table of Contents (continued)

Table of Contents (continued)

List of Figures

List of Figures (continued)

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.

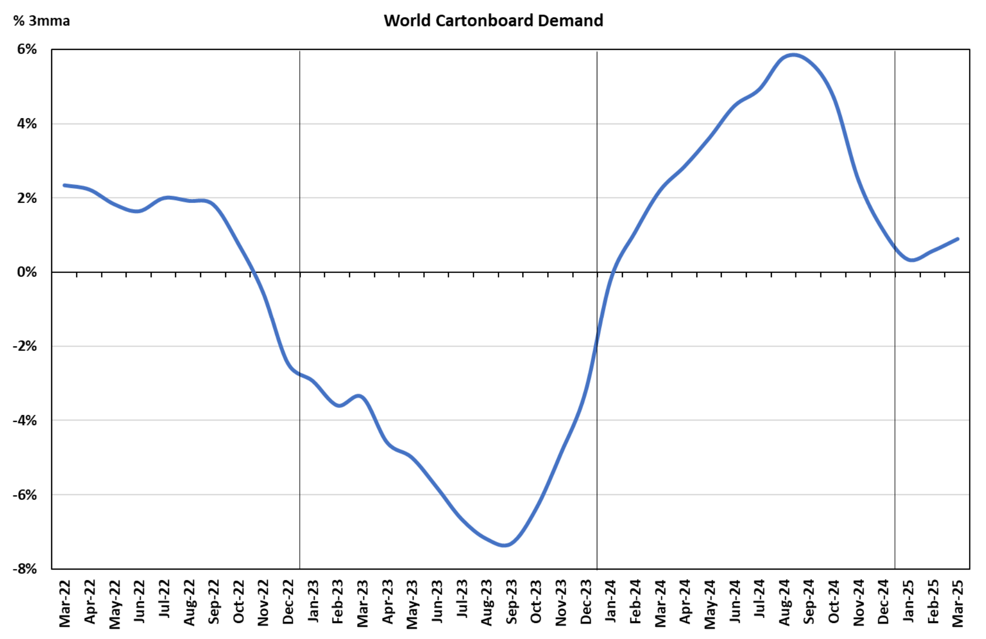
In order to assess the impact of consolidation and changing industry structure, the report provides detailed **Leading Manufacturer rankings** by region and globally, including capacity and market shares of the world's largest manufacturers.

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.

FIGURE 3. GLOBAL DEMAND GROWTH



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.