

WORLD CONTAINERBOARD MARKET OUTLOOK 2030 (SUMMER 2025)



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Sources & Acknowledgement

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

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Case Studies / Sources:

- *McKinsey Packaging Survey (2023)*
- *Two Sides Consumer Trends Report (2023 & 2025)*
- *FEFCO Publications*
- *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 that follow.

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 forecast data on supply, demand and pricing. Stakeholders such as equipment suppliers, paper and board mills, converters, industry associations, government departments and other consulting firms use our data and market analyses to support their own decision-making and forecasting, from pricing deals to building/upgrading or closing production machinery.

In this, our newest report, we aim to provide a highly-detailed set of forecasts for the Containerboard market on a global basis.

EMGE's **WORLD CONTAINERBOARD 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 details the current situation and the future market outlook for Containerboard 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 also provides detailed **Leading Manufacturer rankings** by region and globally, including capacity and market shares of the world's largest manufacturers.

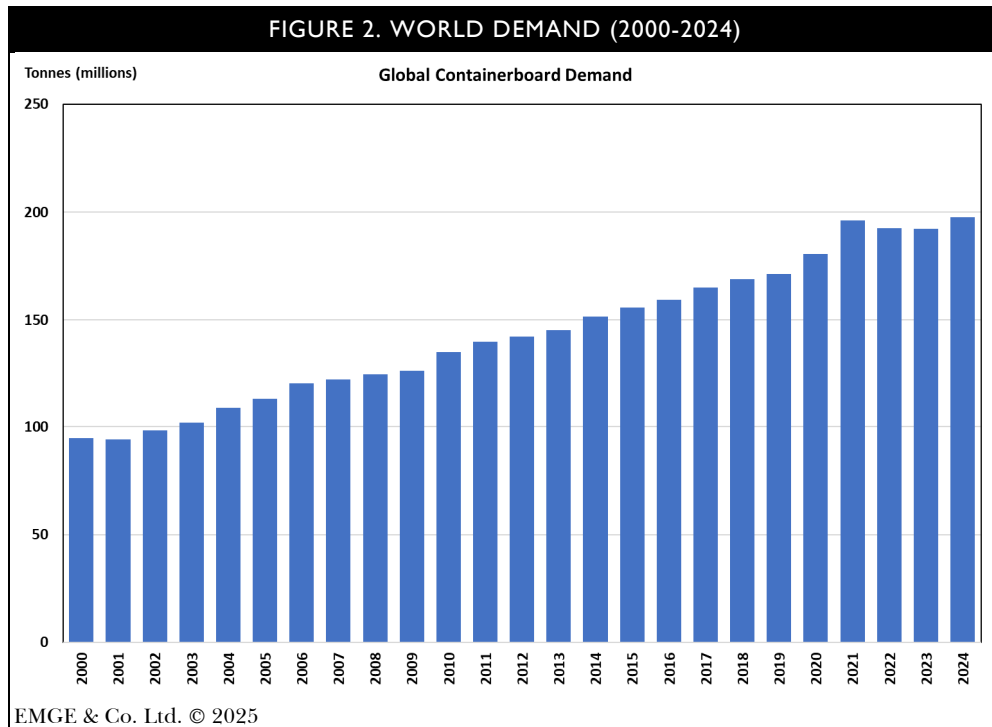
In that respect, great care has been taken to assess **Machine Capacity** in detail, based on existing capacity, plus announced, financed and confirmed plans.

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 risks.

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.

1. Historical / Current Overview

1.1. Historical Market Trends



In the year 2000, global containerboard demand was just under 100 million tonnes. By 2024, this had doubled.

In recent years, however, market dynamics have changed, due to COVID-19 and the resultant inflation spike.

For example, from 2021 to 2024, there has been almost no growth at all (on average for that whole period), as COVID-related e-commerce caused a demand spike in 2021, then supply-chain issues and inflation undermined demand in 2022 and 2023, followed by a moderate recovery in 2024.

Please see the following pages for detailed analysis of changing global demand trends.