



Freedonia Focus Reports
US Collection

Corrugated & Paperboard Boxes: United States

March 2022



CLICK TO ORDER
FULL REPORT
BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	5
Historical Trends	5
Key Economic Indicators	7
COVID-19 Impact	8
Sustainability Initiatives	10
3. Segmentation & Forecasts	13
Products	13
Corrugated Boxes	14
Folding Paperboard Cartons	15
Set-Up Paperboard Boxes	16
Markets	18
Food & Beverages	19
Nonfood Nondurable Goods	20
Durable Goods	20
Nonmanufacturing	21
Supply & Demand	23
4. Industry Structure	24
Industry Characteristics	24
Market Share	25
International Paper	26
WestRock	27
Graphic Packaging	27
5. About This Report	29
Scope	29
Sources	30
Industry Codes	30
Freedonia Methodology	30
Resources	32

List of Tables & Figures

Figure 1 Key Trends in US Corrugated & Paperboard Box Demand, 2021 – 2026	4
Figure 2 US Corrugated & Paperboard Box Demand Trends, 2011 – 2021	6
Table 1 Key Indicators for US Corrugated & Paperboard Box Demand, 2011 – 2026 (US\$ bil)	7
Figure 3 US Corrugated & Paperboard Box Demand by Product, 2011 – 2026 (US\$ bil)	13
Table 2 US Corrugated & Paperboard Box Demand by Product, 2011 – 2026 (US\$ mil)	13
Figure 4 US Corrugated & Paperboard Box Demand by Product, 2011 – 2026 (%)	17
Figure 5 US Corrugated & Paperboard Box Demand by Market, 2011 – 2026 (US\$ bil)	18
Table 3 US Corrugated & Paperboard Box Demand by Market, 2011 – 2026 (US\$ mil)	18
Figure 6 US Corrugated & Paperboard Box Demand by Market, 2011 – 2026 (%)	22
Table 4 US Corrugated & Paperboard Box Supply & Demand, 2011 – 2026 (US\$ mil)	23
Figure 7 US Corrugated & Paperboard Box Market Share by Company, 2021 (%)	25
Table 5 Leading Suppliers to the US Corrugated & Paperboard Box Market by Product	26
Table 6 NAICS & SIC Codes Related to Corrugated & Paperboard Boxes	30

About This Report

Scope

This report forecasts to 2026 US corrugated and paperboard box demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- corrugated boxes
- folding paperboard cartons
- set-up paperboard boxes

Total demand is also segmented by market as follows:

- food and beverages
- nonfood nondurable goods
- durable goods
- nonmanufacturing markets such as foodservice, e-commerce, and moving/storage

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; production and the various segments are reported at five-year intervals for 2011, 2016, and 2021.

Excluded from this report are products such as:

- aseptic and gable top cartons
- composite cans
- non folding sanitary paperboard food containers
- non-box corrugated products (e.g., displays, pizza and cake circles, partitions and edge protectors)
- paperboard backings of blister packaging
- paperboard trays and related non-box foodservice items

Excluded from the market scope are large-scale, online business-to-business sales, such as bulk chemicals from a chemical producer to a motor vehicle parts manufacturer.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Corrugated & Paperboard Boxes: United States (FF30013) is based on *Corrugated & Paperboard Boxes*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group and Packaged Facts

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Corrugated & Paperboard Boxes

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322130	Paperboard Mills	2631	Paperboard Mills
322211	Corrugated and Solid Fiber Box Manufacturing	2652	Setup Paperboard Boxes
322212	Folding Paperboard Box Manufacturing	2653	Corrugated and Solid Fiber Boxes
322219	Other Paperboard Container Manufacturing	2657	Folding Paperboard Boxes, Including Sanitary

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published

data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Corrugated & Paperboard Boxes

Freedonia Industry Studies

Cannabis Packaging Opportunities

Food Packaging

Food Packaging Consumer Insights

Foodservice Single-Use Products in the US

Fresh Produce Corrugated Boxes

Fresh Produce Packaging

Frozen Food Boxes & Cartons

Frozen Food Packaging

Global Bulk Packaging

Global Corrugated Boxes

Global E-Commerce Packaging

Global Foodservice

Global Foodservice Single-Use Products

Global Packaging Machinery

Global Pharmaceutical Packaging

Global Pressure Sensitive Tapes

Global Protective Packaging

Meat, Poultry, & Seafood Packaging

Pharmaceutical Packaging

Protective Packaging

Rigid Bulk Packaging

Freedonia Focus Reports

Corrugated Boxes: United States

Frozen Food Packaging: United States

Global Labels

Meat Packaging: United States

Poultry Packaging: United States

Freedonia Custom Research

Packaged Facts

The Future of Grocery: Online Grocery, Meal Kits, & Direct-to-Consumer Food

Trade Publications

Beverage Industry

Packaging Digest

Packaging World

Paper 360°

PaperAge

Paperboard Packaging

Pharmaceutical & Medical Packaging News

Pulp & Paper International

Recycling Today

Agencies & Associations

American Forest & Paper Association

Association of Independent Corrugated Converters

Fibre Box Association

International Corrugated Case Association

Paperboard Packaging Council

United States Census Bureau

United States International Trade Commission