

# Corrugated & Paperboard Boxes

Industry Study with Forecasts for 2020 & 2025

Study #3398 | April 2016 | \$5500



Growth in corrugated and paperboard box demand will be relatively slow through 2020, especially in volume terms, as market maturity and competition from other packaging formats continue to limit gains. However, market value will register moderate growth as manufacturers seek to improve their competitive position or profitability through the addition of value-added features that allow the boxes to be sold at a price premium.

The expanding use of flexible formats such as stand-up pouches in food packaging has led to limited opportunities for paperboard boxes, which have historically derived a major part of demand from markets such as grain mill and bakery products. However, the implementation of custom box sizing and high-quality printing will allow these products to remain competitive in retail and e-commerce markets.

## High-quality printing offers distinction

Both corrugated and paperboard box manufacturers will benefit from greater demand for boxes with high-quality graphics. The incorporation of images with greater clarity on boxes is made possible by the use of specialized coatings and a growing range of printing techniques, including digital printing, that make reproduction of colorful graphics onto a box's surface easier and more economical. There is also a general shift toward corrugated boxes that incorporate value-added features such as easy-tear strips, and are customized specifically for the packaged contents.

## E-commerce & retail-ready applications spur growth

E-commerce and retail-ready applications will provide above average growth for corrugated and solid fiber boxes. The e-commerce market will continue to provide new opportunities for box manufacturers and users to transform commodity-like shipping containers into products that add to the marketing and branding potential of the packaged goods. Retail-ready packaging can help a product stand out on store shelves and can reduce labor costs by being easier to identify and stock.

## Food & beverages remain largest market

Food and beverages comprise the single largest market for corrugated and paperboard boxes, accounting for nearly 50 percent of demand in 2015. As brand proliferation and marketing opportunities for food continue to rise, so will demand for boxes that supply brand information or are needed to protect shipments in transit.

## Study coverage

This study analyzes the US market for corrugated and paperboard boxes. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for demand by product, material and market. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles 27 US industry competitors such as International Paper, Graphic Packaging, Georgia-Pacific, Packaging Corporation of America, and Westrock.

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  - Other Nondurable Goods
- Durable Goods

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### MARKETS

**Pharmaceuticals** - Pharmaceuticals were the largest segment of the chemical and pharmaceutical products box market in 2015, counting for 43 percent of total demand. Folding cartons comprised the largest percent of demand in this market in 2015, with corrugated and solid fiberboard boxes accounting for much of the remainder. Set-up boxes are also used to a limited extent. Box demand in the pharmaceutical market is forecast to increase by 1.5 billion in 2020, driven by growth in pharmaceuticals and related products, a rising population, a rising occurrence of prescription drug coverage, third-party payor systems, and trends favoring the elimination of unit-dose packaging in bottles and tubes in favor of faster gains.

Producers of OTC medicines and dietary supplements often use outer folding cartons to influence consumer buying decisions or upgrade packaging with tamper evident features. Usage of cartons with ethical pharmaceuticals is growing due to the increasing level of direct-to-consumer prescription drug advertising, which is prompting some pharmaceutical companies to upgrade the secondary packaging of top-selling products. Ethical drugs and biologicals sold in prefilled syringes, prefilled inhalers, transdermal patches, and other high value added delivery systems are also typically supplied in outer containers that provide for easier storage and to enhance security. Folding cartons are also commonly used as secondary packaging for medicines in blister pack form.

Standard flap reclosable boxes composed of latex-coated or solid bleached sulfate paperboard are the most common outer containers used in pharmaceutical packaging. Boxes for OTC medicines and dietary supplements usually incorporate enhanced graphics aimed at attracting attention.

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**TABLE V-11**

### CANDY & CONFECTION BOX MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Sugar & Confectionery Shipments (bil \$) \$ boxes/000\$ confections					
Candy & Confection Box Demand					
Corrugated Boxes					
Folding Paperboard Boxes					
Set-Up Paperboard Boxes					
% confection					
Food & Beverage Box Demand					

Source: The Freedonia Group

**TABLE IV-2**

### CORRUGATED & SOLID FIBER BOX SUPPLY & DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Manufacturers' Shipments (bil \$) \$ boxes/000\$ mfg					
Corrugated & Solid Fiber Box Demand					
+ net exports					
Corrugated & Solid Fiber Box Shipments					
Corrugated					
Solid Fiber					
\$/ton					
Corrugated & Solid Fiber Shpts (000 tons)					

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

## Related Studies

### Food Containers: Rigid & Flexible

US demand for food containers will rise 2.8 percent yearly to \$31.2 billion in 2020. Plastic containers will continue to supplant paperboard, metal and glass as the product mix shifts toward flexible packaging. Novel formats such as clear plastic cans and squeezable spouted pouches will continue to emerge as package redesigns outpace new food products. This study analyzes the \$27.1 billion US rigid and flexible food container market, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

#3367..... February 2016 ..... \$5400

### World Corrugated Boxes

World demand for corrugated boxes is expected to increase 3.7 percent annually through 2019, to 260 billion square meters. Gains will be driven by strong growth in e-commerce and a sustainability advantage over plastic containers. The Asia/Pacific region will account for the largest share of net growth. This study analyzes the 217 billion square meter world corrugated box industry, with forecasts for 2019 and 2024 by raw material and market for six world regions and 27 major countries. The study also evaluates company market share and profiles industry players.

#3339..... November 2015 ..... \$6400

### Produce Packaging

Demand for produce packaging in the US is forecast to increase 3.2 percent annually to \$6.0 billion in 2019. Plastic containers and stand-up pouches will be among the fastest growing package formats, based on their aesthetic appeal and capability to increase brand marketing and recognition. Corrugated boxes will remain the leading type. This study analyzes the \$5.1 billion US produce packaging industry, with forecasts for 2019 and 2024 by packaging type, application and end user. The study also evaluates company market share and profiles industry players.

#3319..... August 2015 ..... \$5300

### Wine Packaging

Demand for wine packaging in the US will increase 4.4 percent annually to \$3.0 billion in 2019. Glass bottles will remain dominant but will face increasing competition from alternative formats and sizes, such as single-serving plastic bottles, aseptic cartons, aluminum cans, and cups and goblets, as well as bag-in-box packaging. This study analyzes the \$2.4 billion US wine packaging industry, with forecasts for 2019 and 2024 by container, closure, accessory and bulk packaging type. The study also evaluates company market share and profiles industry competitors.

#3308..... August 2015 ..... \$5300

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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