

Global Corrugated Packaging Market Outlook to 2021



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Consumer electronics will be the leading market segment in the non-food sector. Due to growing demand for consumer electronics, the sector will gain some further market share in the corrugated packaging market.

Table 3.4: Corrugated packaging demand segmentations by non-food sectors (million tonnes)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Automotive									
Consumer electronics									
Foodservice disposables									
Furniture and timber products									
Glassware and ceramics									
Healthcare									
Home care									
Industrial chemicals									
Personal care									
Sports and fitness									
Stationery									
Textile and footwear									
Tobacco									
Others									
Total									













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Introduction- assumptions

- The report excludes the following types of boxes in demand estimation:
 - Liquid cartons
 - Rigid/setup box
 - folding carton
- Trade data may include rigid/setup box data for some countries.
- Demand in value terms is estimated by using local currencies and then converting to the US dollars.
- Some trade statistics are also converted from local currencies to the US dollars. For instance, the EU28 trade data converted from euro to the US dollar.
- The impact of Brexit is excluded in our future assessment as there is no definite timescale of triggering article 50. Moreover, the formal fully withdrawals of the UK from the EU may take years.

Market developments and their implications during the forecast period

Market response 2016-2021

Drivers & Challenges	Trend	Intensity	Implications
Rising production cost			<ul style="list-style-type: none"> Rising production costs will continue to negatively impact demand of corrugated packaging and can bolster demand of alternatives packaging. Some producers will also shift their production capacity to low-cost markets e.g from China to Indonesia and Vietnam.
			
			
			
			
			

Harvey Balls  Very high  High  Medium  Low  Very low

Brazil is one of the largest consumers of corrugated packaging in Central and South America. It accounted for 39% of the total regional consumption in 2015.

Table 3.11: Brazilian corrugated packaging demand, 2013-2021 (million tonnes, %)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Demand									
% Change									

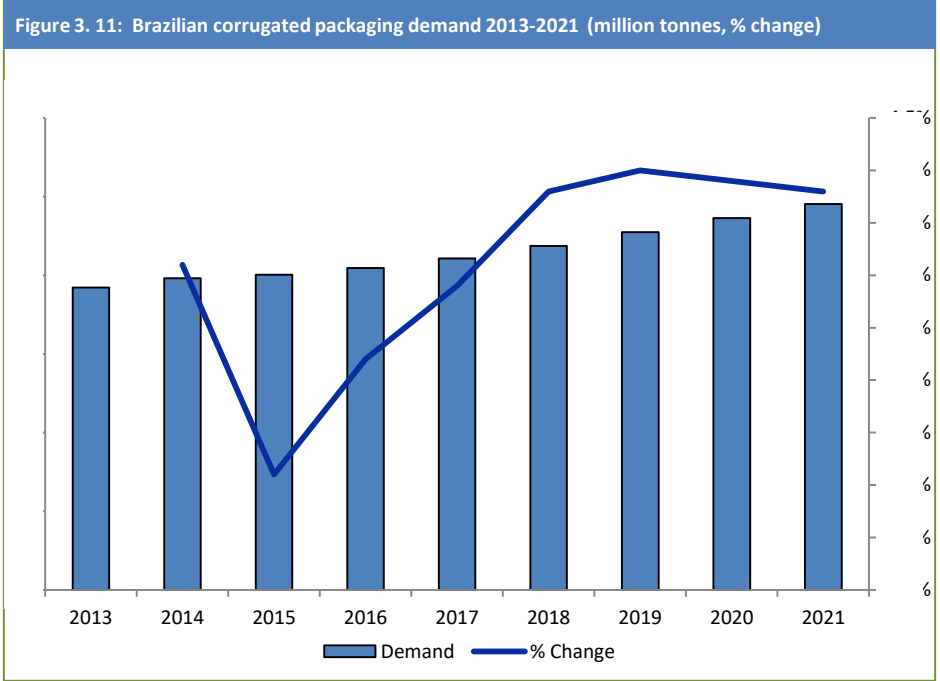
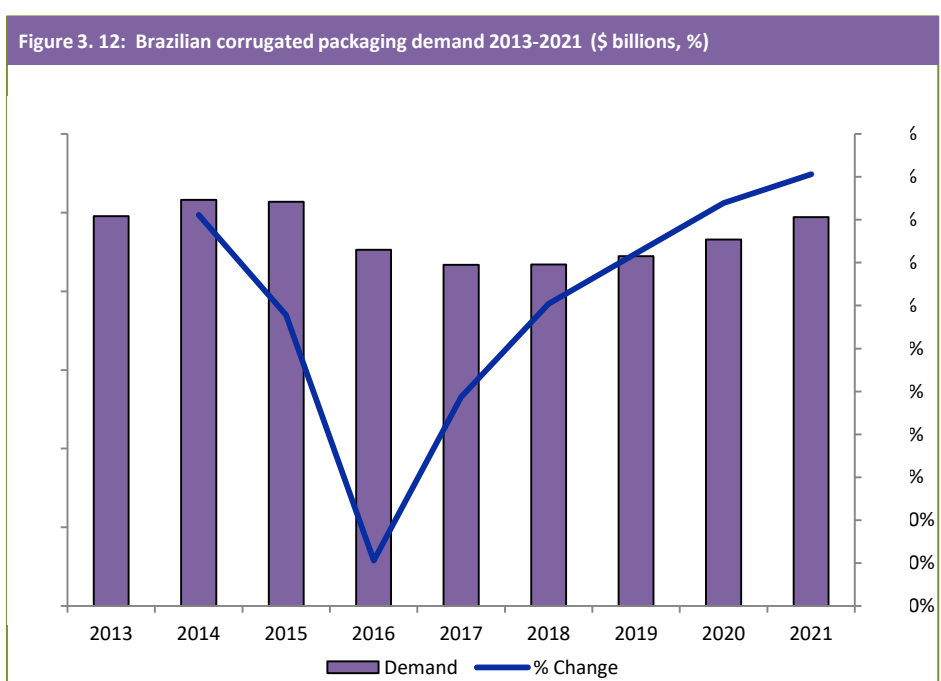


Table 3.12: Brazilian corrugated packaging demand 2013-2021 (\$ billions, %)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Demand									
% Change									



Die-cut and complex packaging will provide extra growth to corrugated paper packaging demand in Brazil.

- It is the export market which is quite lucrative. Given the current political and economic conditions, the Brazilian real is expected to weaken further which can underpin demand for finished goods to neighbouring countries. The weak currency will also attract foreign investors for acquisitions in the corrugated packaging market.

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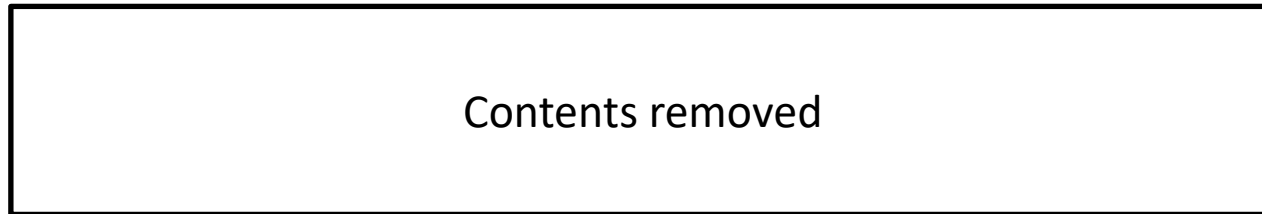
Sports and fitness market is expected to grow significantly over the forecast period particularly in the developed countries, and with a renewed growth in emerging markets.

- Sports and fitness market is expected to show some strengths in developed markets where people are getting increasingly conscious about their health and wellbeing. Governments and corporate initiatives have also underpinned demand in the market. Online retailing has also boosted demand for fitness equipment as people can see different features and reviews without physically going to see the equipment. Buyers have now the ability to buy through various online platforms such as Amazon and eBay which prove cheaper than buying from a high street shop (or at least its online store).

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International Paper (IP) is the world largest producer of containerboard and corrugated packaging.

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- We expect that falling paper demand will pose a threat to the profitability of IP's corrugated packaging business. Some of the idled paper capacity is likely to be used for making linerboard, which consequently can pressurise corrugated packaging prices and diminish profit margins for IP.

For further information about this report and additional research, please visit

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