

Global Corrugating Medium for Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Corrugating Medium for Packaging market size is expected to reach \$ 56568 million by 2032, rising at a market growth of 3.0% CAGR during the forecast period (2026-2032).

Corrugating medium for packaging refers to the roll-form paper grade used to form the fluted inner layer of corrugated board. It is a structural and cushioning base material in corrugated board and corrugated boxes. The product is generally manufactured from recovered corrugated containers, mixed recovered paper, semi-chemical pulp, chemi-mechanical pulp, or selected virgin fibres through continuous papermaking processes including pulping, screening, cleaning, fibre treatment, sheet forming, pressing, drying, winding, and rewinding. In downstream corrugators, the medium is heated, conditioned, fluted, and bonded with linerboard or kraftliner to produce single-wall, double-wall, or multi-wall corrugated board. Key specifications include basis weight, ring crush strength, contribution to edge crush performance, moisture profile, runnability, bonding performance, dimensional stability, wet-strength behaviour, and suitability for high-speed corrugating lines. It is widely used in e-commerce logistics, food and beverage packaging, fresh produce, consumer electronics, home appliances, industrial transport packaging, consumer goods, and retail-ready packaging. As a core paper-based packaging material, corrugating medium is characterized by large-volume demand, high regional supply dependence, strong exposure to recovered paper and energy costs, and a mature but still upgrading product structure.

In terms of price, the average global price range for corrugated base paper for packaging in 2025 is \$460-\$490/ton.

From an industry-definition perspective, corrugating medium for packaging is not a

finished corrugated box or corrugated board, but the base paper used to form the fluted core layer inside corrugated board. It belongs to the broader containerboard family together with linerboard, yet its functional and commercial logic is different. Linerboard is more closely linked to surface strength, burst resistance, printability and appearance, while corrugating medium is more dependent on ring crush strength, flute formation, bonding performance, moisture profile and runnability on high-speed corrugators.

From a demand perspective, corrugating medium is structurally tied to the movement of goods. E-commerce logistics, food and beverage distribution, fresh produce, consumer electronics, appliances, industrial goods, export packaging and retail-ready packaging are the main demand anchors. In mature markets, growth is mainly driven by packaging optimization, plastic substitution, retail channel shifts and cold-chain applications rather than broad volume expansion. In China and Southeast Asia, demand is additionally supported by manufacturing clusters, domestic consumption, cross-border e-commerce and export-oriented industrial supply chains. China's paper industry data show that corrugating medium production and consumption reached 31.45 million tonnes and 34.07 million tonnes respectively in 2024, confirming the scale and continuing relevance of the Chinese market. In the United States, containerboard production declined in 2025, but operating rates remained above 90%, indicating that mature-market demand is cyclical but still structurally embedded in the packaging system.

This report studies the global Corrugating Medium for Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Corrugating Medium for Packaging and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Corrugating Medium for Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Corrugating Medium for Packaging total production and demand, 2021-2032, (Kilotons)

Global Corrugating Medium for Packaging total production value, 2021-2032, (USD Million)

Global Corrugating Medium for Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Corrugating Medium for Packaging consumption by region & country, CAGR,

2021-2032 & (Kilotons)

U.S. VS China: Corrugating Medium for Packaging domestic production, consumption, key domestic manufacturers and share

Global Corrugating Medium for Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Corrugating Medium for Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Corrugating Medium for Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Corrugating Medium for Packaging market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Smurfit Westrock, International Paper, Nine Dragons Paper, Lee & Man Paper, PCA, Georgia-Pacific, Pratt Industries, Mondi, DS Smith / IP, SAICA, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Corrugating Medium for Packaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Corrugating Medium for Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Corrugating Medium for Packaging Market, Segmentation by Type:

Recycled Fibre Corrugating Medium

Semi-chemical Fluting

Virgin / Kraft-based Fluting

Other

Global Corrugating Medium for Packaging Market, Segmentation by Corrugated Board Structure:

Single-wall Board Medium

Double-wall Board Medium

Triple-wall / Heavy-duty Board Medium

Single-face / Protective Roll Medium

Other Board Structure Medium

Global Corrugating Medium for Packaging Market, Segmentation by Application:

E-commerce and Parcel Packaging

Food and Beverage Packaging

Fresh Produce and Cold-chain Packaging

Consumer Electronics and Appliances Packaging

Industrial and Heavy-duty Packaging

Retail-ready and Display Packaging

Other

Companies Profiled:

Smurfit Westrock

International Paper

Nine Dragons Paper

Lee & Man Paper

PCA

Georgia-Pacific

Pratt Industries

Mondi

DS Smith / IP

SAICA

Progroup

Prinzhorn / Hamburger

Stora Enso

Oji Holdings

Rengo

SCG Packaging

Shanying International

Sun Paper

Zhejiang Jingxing

Linping Development

Dongguan Jintian Paper

Jianhui Paper

Cheng Loong

YFY

Long Chen Paper

Daio Paper

Nippon Paper

Asia Paper

Tailim Paper

Shindaeyang Paper

GS Paperboard & Packaging

Muda Holdings

Indah Kiat / APP

Fajar Surya Wisesa

Astron Paper

Shree Ajit

Genus Paper

Klabin

Irani Papel e Embalagem

Bio Pappel

Grupo Gondi

Modern Karton

Kipa? Ka??t

Visy Industries

Opal

Wuhan Jin Feng Huang Paper Industries Co., Ltd.

Shandong Century Sunshine Paper Group

Liansheng Paper Industry (Longhai) Co., Ltd.

Zhejiang Rongsheng Environmental Protection Paper Co., Ltd.

Forest Packaging Group Co., Ltd.

Jiangsu Longchen Greentech Co., Ltd.

Henan Province Longyuan Paper Industry Co., Ltd.

Zhejiang Jinlong Recycled Resources Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Corrugating Medium for Packaging market?
2. What is the demand of the global Corrugating Medium for Packaging market?
3. What is the year over year growth of the global Corrugating Medium for Packaging market?
4. What is the production and production value of the global Corrugating Medium for Packaging market?
5. Who are the key producers in the global Corrugating Medium for Packaging market?
6. What are the growth factors driving the market demand?

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