

Global Corrugating Medium and Linerboard Market Growth 2026-2032

<https://marketpublishers.com/r/G908AB03F187EN.html>

Date: August 2026

Pages: 171

Price: US\$ 3,660.00 (Single User License)

ID: G908AB03F187EN

Abstracts

The global Corrugating Medium and Linerboard market size is predicted to grow from US\$ 154140 million in 2025 to US\$ 193970 million in 2032; it is expected to grow at a CAGR of 3.4% from 2026 to 2032.

Corrugating medium and linerboard are the two main materials for making corrugated board and cartons. Corrugating medium is mainly used to make the corrugated layer of corrugated board. It has high stiffness and pressure resistance to provide cushioning and support. Kraft linerboard is used for the surface layer of cartons. It is usually made of virgin wood pulp or recycled pulp. It has strong burst resistance, water resistance and compressive strength, and can effectively protect the internal items. The combination of the two can improve the overall strength and impact resistance of cartons, and is widely used in logistics, packaging and transportation industries.

The global corrugating medium and linerboard market continues to grow under the trend of e-commerce explosion, green packaging transformation and supply chain localization. The core drivers of demand come from the increase in e-commerce penetration (global e-commerce parcel volume is expected to reach 300 billion pieces in 2030, a 60% increase from 2023), the demand for lightweight packaging of food, beverages and consumer goods, and the industrialization process of emerging markets (manufacturing capacity expansion in Southeast Asia, India and other regions). As the world's largest producer and consumer (accounting for more than 45% of global production), China is transforming from ?quantity increase? to ?quality improvement?; driven by circular economy policies, the European and American markets continue to increase the use rate of recycled fibers (more than 85%) and the proportion of recycled cartons (the EU goal is to reach 90% in 2030).

Analysis of core influencing factors:

Environmental protection policies and circular economy transformation: Global "plastic ban" (such as the EU SUP directive) promotes paper packaging to replace plastic. The carbon neutrality goal forces companies to optimize their carbon footprint (carbon emissions per ton of paper are reduced to less than 0.8 tons), but rising environmental protection costs squeeze the profit space of small and medium-sized manufacturers.

Cost fluctuations and supply chain reconstruction: On the raw material side, the price of waste paper is dominated by the perfection of the recycling system (the price fluctuation of domestic waste paper in China is 20% lower than that of US waste paper) and energy costs (the European natural gas crisis in 2023 will cause the cost of pulp to rise by \$150 per ton).

Technology upgrade and product innovation: Lightweight and high-strength paper grades (the ring pressure index of boxboard paper is increased to more than 12N/m/g) reduce logistics costs by 15%-20%; digital printing technology (pre-printing accuracy reaches 1200dpi) supports customized packaging needs; smart factories (AI energy consumption optimization system reduces power consumption by 10%) and low-carbon pulping technology (enzymatic waste paper deinking technology improves efficiency by 30%) are the key to competition.

Competitive landscape and substitution challenges: Industry concentration has increased, and leading companies such as International Paper (IP), Nine Dragons, and Shanying have controlled more than 40% of the market share through vertical integration (forest pulp and paper integration); small and medium-sized manufacturers focus on regional market segments (such as cold chain special paper). In terms of substitutes, the penetration rate of degradable plastics (PLA/PHA) in high-end packaging has increased, but its cost (3-5 times higher than corrugated paper) and mechanical performance shortcomings restrict comprehensive replacement.

Future Outlook and Risks: In the short term (2024-2026), the market will benefit from the global consumption recovery and RCEP regional supply chain integration, but it faces three major challenges in the medium and long term: First, the economic downturn will lead to consumption downgrade (if the global GDP growth rate is lower than 2%, it will suppress packaging demand); second, digital reduction (such as RFID tags replacing outer box information printing) reduces paper intensity; third, extreme weather (such as drought affecting the growth of pulp raw material forests) exacerbates the risk of raw material supply. Enterprises need to build a dual barrier of cost and

green through the extension of the industrial chain (layout of waste paper recycling network), high-end products (nanocellulose enhanced paper-based materials) and global production capacity coordination (European and American recycled pulp + emerging market base paper production capacity) to cope with the deep game between cyclical fluctuations in the industry and sustainable transformation.

LP Information, Inc. (LPI) ' newest research report, the "Corrugating Medium and Linerboard Industry Forecast" looks at past sales and reviews total world Corrugating Medium and Linerboard sales in 2025, providing a comprehensive analysis by region and market sector of projected Corrugating Medium and Linerboard sales for 2026 through 2032. With Corrugating Medium and Linerboard sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Corrugating Medium and Linerboard industry.

This Insight Report provides a comprehensive analysis of the global Corrugating Medium and Linerboard landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Corrugating Medium and Linerboard portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Corrugating Medium and Linerboard market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Corrugating Medium and Linerboard and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Corrugating Medium and Linerboard.

This report presents a comprehensive overview, market shares, and growth opportunities of Corrugating Medium and Linerboard market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Corrugating Medium

Linerboard

Segmentation by Application:

Food and Beverages

Home Appliances

Apparel

Daily Chemicals

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

International Paper

Smurfit Westrock

Packaging Corporation of America

Georgia-Pacific

ND Paper

Lee & Man Paper

Klabin

Mondi Group

Shandong Sun Paper

Ilim Group

Mets? Board

Nippon Paper Group

Svenska Cellulosa Aktiebolaget

Stora Enso

New-Indy

Sappi

Shandong Bohui Paper Industrial

Arkhangelsk Pulp & Paper Mill

Cascades

Oji Holdings Corporation

Daio Paper

Rengo

Jingxing Paper

Greif

Shanying International Holdings

Longchen Paper & Packaging

Klingele

Key Questions Addressed in this Report

What is the 10-year outlook for the global Corrugating Medium and Linerboard market?

What factors are driving Corrugating Medium and Linerboard market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Corrugating Medium and Linerboard market opportunities vary by end market size?

How does Corrugating Medium and Linerboard break out by Type, by Application?

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