

# Fanfold Packaging Market Forecasts to 2032 – Global Analysis By Material (Corrugated Board, Kraft Paper, Cardboard, Recycled Paper and Other Materials), Thickness, Distribution Channel, Packaging, Technology, End User and By Geography

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## Abstracts

According to Statistics MRC, the Global Fanfold Packaging Market is accounted for \$6.03 billion in 2025 and is expected to reach \$8.66 billion by 2032 growing at a CAGR of 5.3% during the forecast period. Fanfold packaging, which is frequently kept in stacks or rolls, uses continuous corrugated cardboard sheets folded in a zigzag pattern. This design minimises wasteful material consumption and storage space by enabling on-demand, customised box production. Fanfold packaging makes it possible to efficiently pack a variety of product sizes without having to transition between different box types, making it perfect for e-commerce, manufacturing, and logistics. It is a sustainable and economical packaging option for dynamic production environments, and it is commonly used in conjunction with automated packing equipment to optimise shipping costs, reduce waste, and expedite operations.

According to a study published in the Confederation of European Paper Industries, total paper production in 2022 reached 84.8 million tonnes, with a decrease reported in almost all paper and board grades, except for household and sanitary grades.

Market Dynamics:

Driver:

Rise in E-commerce and logistics

Online merchants need packaging that is economical, effective, and flexible enough to accommodate a variety of product sizes. Fanfold packaging lowers material waste and transportation expenses by enabling automated processes to produce boxes of the proper size. Because innovative packaging increases shipment efficiency and improves warehouse operations, the logistics industry also gains. Additionally, fanfold packaging's capacity to reduce unnecessary packaging is consistent with the increased emphasis on sustainability. All things considered, the fanfold packaging business is expanding quickly because to the rise in internet shopping and sophisticated logistics.

Restraint:

High initial investment

Advanced equipment and technology required for production might be highly expensive. Small and medium-sized businesses could find it difficult to set aside enough money for these kinds of initiatives. This inhibits industrial growth and restricts market entrance. Furthermore, many prospective players are deterred by the lengthy payback time. As a result, high initial costs impede market innovation and broader acceptance.

Opportunity:

Growth of smart packaging

The expansion of smart packaging features like tamper-evident sealing and freshness indicators. Ingenious features boost product safety and shelf life, which increases consumer demand. The efficiency of fanfold packaging is enhanced by smart packaging, which also makes better supply chain management possible through tracking and authentication. Furthermore, fanfold materials with sensors and QR codes boost customer engagement and brand loyalty. The market is developing as a result of increased application in sectors like food, electronics, and medicines. Fanfold packaging and smart technology are therefore working together to create new opportunities and quicken the expansion of the sector.

Threat:

Competition from alternative packaging

More convenience, sustainability, or financial benefits can be obtained with substitutes including rigid containers, flexible pouches, and environmentally friendly packaging.

Customers are frequently drawn away from Fanfold solutions by these alternatives since they are more widely available and have better marketing assistance. Furthermore, technological developments in alternative packaging enhance their functionality and attractiveness, increasing their allure. The expansion potential and pricing power of fanfold packaging providers are restricted by the existence of such rival package variants. As a result, in order to preserve their market share, fanfold packaging makers are under pressure to innovate and save expenses.

### Covid-19 Impact

The COVID-19 pandemic had a dual impact on the fanfold packaging market. On the positive side, the surge in e-commerce due to lockdowns significantly increased demand for customizable and efficient packaging solutions, boosting the use of fanfold materials. Conversely, the industry faced challenges like supply chain disruptions, raw material shortages, and labor constraints, leading to production delays and cost escalations. Despite these hurdles, the market demonstrated resilience, with a heightened focus on sustainability and automation paving the way for future growth.

The corrugated board segment is expected to be the largest during the forecast period

The corrugated board segment is expected to account for the largest market share during the forecast period, due to its lightweight and sturdy nature, making it ideal for protective packaging. Its cost-effectiveness and recyclability align with growing environmental concerns, boosting demand. Corrugated board offers excellent printability and customization, attracting brands seeking attractive packaging solutions. The surge in e-commerce and shipping industries increases the need for durable fanfold packaging made from corrugated materials. Overall, the segment's versatility and sustainability significantly propel the growth of the fanfold packaging market.

The electronics & electricals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the electronics & electricals segment is predicted to witness the highest growth rate by demanding reliable and efficient protective packaging solutions for delicate components. As electronic devices continue to miniaturize and increase in complexity, fanfold packaging offers customizable cushioning that ensures product safety during transit. Additionally, the rising production and export of electrical goods globally boost the need for cost-effective, space-saving packaging formats like fanfold sheets. Moreover, the sustainability trends in electronics manufacturing promote

fanfold packaging due to its recyclability and reduced material usage. Consequently, this segment's expansion directly fuels innovation and increased adoption in the fanfold packaging market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share by booming online retail, urbanization, and growing manufacturing activity in countries like China, India, and Southeast Asia. Local companies are focusing on cost-effective, recyclable packaging materials, fuelling demand for fanfold corrugated formats. With governments promoting eco-friendly packaging alternatives and expanding export activities, regional manufacturers are increasingly investing in modern packaging machinery, creating strong growth potential in this sector.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to rising demand in e-commerce, logistics, and industrial sectors. Companies are adopting fanfold corrugated packaging for its flexibility and reduced waste, aligning with sustainability goals. The U.S. leads the region with advancements in packaging automation and custom sizing. Additionally, a strong presence of key packaging solution providers and robust supply chain infrastructure contribute to increased adoption across industries.

Key players in the market

Some of the key players profiled in the Fanfold Packaging Market include International Paper Company, WestRock Company, Smurfit Kappa Group, DS Smith Plc, Mondi Group, Georgia-Pacific LLC, Pratt Industries, KapStone Paper and Packaging Corporation, Packaging Corporation of America (PCA), Cascades Inc., Menasha Packaging Company, LLC, Rengo Co., Ltd., Sealed Air Corporation, Sonoco Products Company, Pro-Pac Packaging Group Pty Ltd, Oji Holdings Corporation, Nine Dragons Paper (Holdings) Limited and Stora Enso Oyj.

Key Developments:

In January 2024, International Paper announced its acquisition of UK-based DS Smith for \$7.2 billion. This strategic move aims to create a global leader in sustainable packaging solutions, enhancing IP's capabilities in corrugated packaging and expanding

its footprint in Europe.

In March 2023, WestRock collaborated with Clayco, initiated the construction of a 410,000-square-foot corrugated box plant in Longview, Washington. This expansion is a strategic move to strengthen WestRock's regional presence and meet the growing demand for corrugated packaging solutions.

#### Materials Covered:

Corrugated Board

Kraft Paper

Cardboard

Recycled Paper

Other Materials

#### Thicknesses Covered:

Single-Wall

Double-Wall

Triple-Wall

Microflute

#### Distribution Channels Covered:

Direct Sales

Distributors

#### Packagings Covered:

Die Cut Fan-Fold

Non-Die Cut Fan-Fold

Perforated Fan-Fold

Non-Perforated Fan-Fold

Other Packagings

#### Technologies Covered:

Flexographic Printing

Digital Printing

Offset Printing

Other Technologies

#### End Users Covered:

E-commerce & Retail

Food & Beverage

Pharmaceuticals

Electronics & Electricals

Automotive

Industrial Goods

Personal Care & Cosmetics

Homecare Products

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

## Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL FANFOLD PACKAGING MARKET, BY MATERIAL**

- 5.1 Introduction
- 5.2 Corrugated Board
- 5.3 Kraft Paper
- 5.4 Cardboard
- 5.5 Recycled Paper
- 5.6 Other Materials

## **6 GLOBAL FANFOLD PACKAGING MARKET, BY THICKNESS**

- 6.1 Introduction
- 6.2 Single-Wall
- 6.3 Double-Wall
- 6.4 Triple-Wall
- 6.5 Microflute

## **7 GLOBAL FANFOLD PACKAGING MARKET, BY DISTRIBUTION CHANNEL**

- 7.1 Introduction
- 7.2 Direct Sales
- 7.3 Distributors

## **8 GLOBAL FANFOLD PACKAGING MARKET, BY PACKAGING**

- 8.1 Introduction
- 8.2 Die Cut Fan-Fold
- 8.3 Non-Die Cut Fan-Fold
- 8.4 Perforated Fan-Fold
- 8.5 Non-Perforated Fan-Fold
- 8.6 Other Packagings

## **9 GLOBAL FANFOLD PACKAGING MARKET, BY TECHNOLOGY**

- 9.1 Introduction
- 9.2 Flexographic Printing
- 9.3 Digital Printing
- 9.4 Offset Printing
- 9.5 Other Technologies

## **10 GLOBAL FANFOLD PACKAGING MARKET, BY END USER**

- 10.1 Introduction
- 10.2 E-commerce & Retail
- 10.3 Food & Beverage
- 10.4 Pharmaceuticals
- 10.5 Electronics & Electricals
- 10.6 Automotive
- 10.7 Industrial Goods
- 10.8 Personal Care & Cosmetics
- 10.9 Homecare Products
- 10.10 Other End Users

## **11 GLOBAL FANFOLD PACKAGING MARKET, BY GEOGRAPHY**

- 11.1 Introduction
- 11.2 North America
  - 11.2.1 US
  - 11.2.2 Canada
  - 11.2.3 Mexico
- 11.3 Europe
  - 11.3.1 Germany
  - 11.3.2 UK
  - 11.3.3 Italy
  - 11.3.4 France
  - 11.3.5 Spain
  - 11.3.6 Rest of Europe
- 11.4 Asia Pacific
  - 11.4.1 Japan
  - 11.4.2 China
  - 11.4.3 India
  - 11.4.4 Australia
  - 11.4.5 New Zealand
  - 11.4.6 South Korea
  - 11.4.7 Rest of Asia Pacific
- 11.5 South America
  - 11.5.1 Argentina
  - 11.5.2 Brazil

- 11.5.3 Chile
- 11.5.4 Rest of South America
- 11.6 Middle East & Africa
  - 11.6.1 Saudi Arabia
  - 11.6.2 UAE
  - 11.6.3 Qatar
  - 11.6.4 South Africa
  - 11.6.5 Rest of Middle East & Africa

## **12 KEY DEVELOPMENTS**

- 12.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 12.2 Acquisitions & Mergers
- 12.3 New Product Launch
- 12.4 Expansions
- 12.5 Other Key Strategies

## **13 COMPANY PROFILING**

- 13.1 International Paper Company
- 13.2 WestRock Company
- 13.3 Smurfit Kappa Group
- 13.4 DS Smith Plc
- 13.5 Mondi Group
- 13.6 Georgia-Pacific LLC
- 13.7 Pratt Industries
- 13.8 KapStone Paper and Packaging Corporation
- 13.9 Packaging Corporation of America (PCA)
- 13.10 Cascades Inc.
- 13.11 Menasha Packaging Company, LLC
- 13.12 Rengo Co., Ltd.
- 13.13 Sealed Air Corporation
- 13.14 Sonoco Products Company
- 13.15 Pro-Pac Packaging Group Pty Ltd
- 13.16 Oji Holdings Corporation
- 13.17 Nine Dragons Paper (Holdings) Limited
- 13.18 Stora Enso Oyj

## List Of Tables

### LIST OF TABLES

Table 1 Global Fanfold Packaging Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Fanfold Packaging Market Outlook, By Material (2024-2032) (\$MN)

Table 3 Global Fanfold Packaging Market Outlook, By Corrugated Board (2024-2032) (\$MN)

Table 4 Global Fanfold Packaging Market Outlook, By Kraft Paper (2024-2032) (\$MN)

Table 5 Global Fanfold Packaging Market Outlook, By Cardboard (2024-2032) (\$MN)

Table 6 Global Fanfold Packaging Market Outlook, By Recycled Paper (2024-2032) (\$MN)

Table 7 Global Fanfold Packaging Market Outlook, By Other Materials (2024-2032) (\$MN)

Table 8 Global Fanfold Packaging Market Outlook, By Thickness (2024-2032) (\$MN)

Table 9 Global Fanfold Packaging Market Outlook, By Single-Wall (2024-2032) (\$MN)

Table 10 Global Fanfold Packaging Market Outlook, By Double-Wall (2024-2032) (\$MN)

Table 11 Global Fanfold Packaging Market Outlook, By Triple-Wall (2024-2032) (\$MN)

Table 12 Global Fanfold Packaging Market Outlook, By Microflute (2024-2032) (\$MN)

Table 13 Global Fanfold Packaging Market Outlook, By Distribution Channel (2024-2032) (\$MN)

Table 14 Global Fanfold Packaging Market Outlook, By Direct Sales (2024-2032) (\$MN)

Table 15 Global Fanfold Packaging Market Outlook, By Distributors (2024-2032) (\$MN)

Table 16 Global Fanfold Packaging Market Outlook, By Packaging (2024-2032) (\$MN)

Table 17 Global Fanfold Packaging Market Outlook, By Die Cut Fan-Fold (2024-2032) (\$MN)

Table 18 Global Fanfold Packaging Market Outlook, By Non-Die Cut Fan-Fold (2024-2032) (\$MN)

Table 19 Global Fanfold Packaging Market Outlook, By Perforated Fan-Fold (2024-2032) (\$MN)

Table 20 Global Fanfold Packaging Market Outlook, By Non-Perforated Fan-Fold (2024-2032) (\$MN)

Table 21 Global Fanfold Packaging Market Outlook, By Other Packagings (2024-2032) (\$MN)

Table 22 Global Fanfold Packaging Market Outlook, By Technology (2024-2032) (\$MN)

Table 23 Global Fanfold Packaging Market Outlook, By Flexographic Printing (2024-2032) (\$MN)

Table 24 Global Fanfold Packaging Market Outlook, By Digital Printing (2024-2032) (\$MN)

Table 25 Global Fanfold Packaging Market Outlook, By Offset Printing (2024-2032) (\$MN)

Table 26 Global Fanfold Packaging Market Outlook, By Other Technologies (2024-2032) (\$MN)

Table 27 Global Fanfold Packaging Market Outlook, By End User (2024-2032) (\$MN)

Table 28 Global Fanfold Packaging Market Outlook, By E-commerce & Retail (2024-2032) (\$MN)

Table 29 Global Fanfold Packaging Market Outlook, By Food & Beverage (2024-2032) (\$MN)

Table 30 Global Fanfold Packaging Market Outlook, By Pharmaceuticals (2024-2032) (\$MN)

Table 31 Global Fanfold Packaging Market Outlook, By Electronics & Electricals (2024-2032) (\$MN)

Table 32 Global Fanfold Packaging Market Outlook, By Automotive (2024-2032) (\$MN)

Table 33 Global Fanfold Packaging Market Outlook, By Industrial Goods (2024-2032) (\$MN)

Table 34 Global Fanfold Packaging Market Outlook, By Personal Care & Cosmetics (2024-2032) (\$MN)

Table 35 Global Fanfold Packaging Market Outlook, By Homecare Products (2024-2032) (\$MN)

Table 36 Global Fanfold Packaging Market Outlook, By Other End Users (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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