

Liquid Paperboard Packaging Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030)

> **Industry:** Paper, Corrugated & Board Packaging (Packaging)
> **Source:** https://www.mordorintelligence.com/industry-reports/liquid-paperboard-packaging-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 766.69 billion
Projected Forecast (2031)	USD 766.69 billion
Growth Rate (CAGR)	3.87 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Liquid Paperboard Packaging industry] (images/chart_2.png)

! [Liquid Paperboard Packaging Market Size] (images/chart_3.png)

! [Liquid Paperboard Packaging Market Share by Material Type, 2024] (images/chart_4.png)

! [Liquid Paperboard Packaging Market Share by Barrier Coating Type, 2024] (images/chart_5.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2019 - 2030 |
Market Volume (2025) | 4.47 Million tonnes |
Market Volume (2030) | 5.40 Million tonnes |
Growth Rate (2025 - 2030) | 3.87 % |
Fastest Growing Market | Asia Pacific |
Largest Market | Middle East and Africa |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Liquid Paperboard Packaging Market Analysis by Mordor IntelligenceThe liquid paperboard packaging market size stood at 4.47 million tonnes in 2025 and is projected to reach 5.40 million tonnes by 2030, translating into a 3.87% CAGR over the forecast period. The trajectory reflects the steady substitution of rigid plastics with fiber-based formats, the growing influence of design-for-recycling rules, and heightened brand investments in carton barrier innovations that lift renewable content without compromising shelf life. Rising online grocery penetration, coupled with the push to decarbonize beverage logistics, is steering volume toward compact, cube-efficient carton formats that fit automated fulfillment systems. At the same time, school milk programs in emerging economies, breakthroughs in bio-based barriers in Europe, and large-scale upstream mill conversions signal that the liquid paperboard packaging market retains ample headroom for both volume-driven and value-driven gains. Competitive intensity remains elevated as three multinational converter groups secure filling-machine placements, creating sizable switching barriers for brand owners. However, mill forward integration and digital printing are opening new paths for differentiation. On balance, the liquid paperboard packaging market is shifting from compliance-led adoption toward performance-led innovation, positioning fiber cartons as a credible mainstream alternative to aluminum foil and multilayer plastic systems.

- Key Report Takeaways*
- By material type, liquid packaging board held 68.43% of 2024 volume and is expanding at a 4.64% CAGR through 2030.
 - By carton type, gable-top formats led with 61.64% share in 2024, while shaped cartons are projected to grow at 5.35% annually to 2030.
 - By shelf life, long shelf-life cartons captured 74.75% of 2024 shipments and are advancing at a 4.87% CAGR.
 - By barrier coating, extrusion polymer-coated board represented 62.53% of 2024 demand, whereas bio-based barrier board is rising at 5.98% per year.
 - By end-use application, beverages held 67.42% of 2024 consumption, but nutraceuticals are pacing the field with a 6.01% CAGR to 2030.
 - By geography, Asia-Pacific commanded 40.32% of 2024 volume, while the Middle East and Africa region is set to climb at a 6.21% CAGR.

Key Market Trends

Market*Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising demand for convenient and shelf-stable beverages	+1.2%	Global with focus on Asia-Pacific and Middle East and Africa	Medium term (2-4 years)
Accelerating push toward sustainable and recyclable packaging	+1.5%	Europe and North America lead, Asia-Pacific following	Long term (≥ 4 years)
Expansion of aseptic cartons in plant-based dairy alternatives	+0.8%	North America, Europe, urban Asia-Pacific	Medium term (2-4 years)
Government-funded school milk carton programs	+0.6%	Asia-Pacific, Africa, Latin America	Long term (≥ 4 years)
Growth of online grocery boosting on-the-go cartons	+0.7%	Global with high uptake in North America, Europe, China	Short term (≤ 2 years)
Digital watermark adoption for closed-loop recycling	+0.4%	Europe and North America pilots, Asia-Pacific scale-up	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The liquid paperboard packaging industry displays moderate fragmentation. Tetra Pak, SIG Combibloc, and Elopak dominate filling-machine installations, creating proprietary ecosystems that tie consumable sales to equipment leases. Switching a single aseptic line can cost upward of USD 5 million, reinforcing vendor lock-in and underpinning pricing power. Mill groups, such as Stora Enso, are moving downstream, as evidenced by the EUR 1 billion Oulu conversion, which integrates digital twin controls and pursues co-branded environmental narratives.

Consolidation among box plants is also reshaping buyer power. The July 2024 merger of Smurfit Kappa and WestRock formed a USD 31 billion revenue giant spanning 62 mills and more than 500 converting sites, unlocking USD 400 million in synergy potential and a global procurement scale previously unmatched in fiber packaging. Smaller converters are differentiating through shaped-carton capability, digital printing, and aluminum-free barriers, creating niches where agile capex and faster product-launch cycles counterbalance incumbent scale.

Technology disruptors advance closed-loop goals. Digital watermarks, orchestrated by the HolyGrail 2.0 project, prove nearly perfect identification of multilayer cartons on sortation belts, foreshadowing region-wide rollouts that could lift carton recycling rates above 70%. On a parallel track, lab studies show solvent-based fiber-polymer separation processes achieving full material recovery, which, if commercialized, would erode the principal recycling critique levied against composite cartons. Collectively, these innovations sustain competitive churn and reinforce the forward momentum of the liquid paperboard packaging market.

Liquid Paperboard Packaging Industry Leaders* Tetra Pak International S.A.

* International Paper Company

* Amcor plc

* Smurfit WestRock

* Stora Enso Oyj

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Liquid Paperboard Packaging Market Report ScopeThe Liquid Paperboard Packaging Market encompasses the production and utilization of paperboard materials specifically designed for liquid packaging applications. These materials are engineered to provide durability, barrier protection, and sustainability, catering to industries such as beverages, food, nutraceuticals, and personal care.

The Liquid Paperboard Packaging Market Report is Segmented by Material Type (Liquid Packaging Board, Food and Cupstock Board), Carton Type (Gable Top Cartons, Brick Cartons, Shaped Cartons), Shelf Life (Long Shelf Life Cartons, Short Shelf Life Cartons), Barrier Coating Type (Extrusion Polymer Coated Board, Dispersion Coated Board, Bio Based Barrier Board), End Use Application (Beverage, Food, Nutraceuticals, Homecare and Personal Care, Other End Use Applications), and Geography (North America, South America, Europe, Asia-Pacific, Middle East and Africa). The Market Forecasts are Provided in Terms of Volume (Million Tonnes).

By Material TypeLiquid Packaging Board |
Food and Cupstock Board |

Segmentation Accordion Item

By GeographyNorth America | United States |

- | Canada |
- | Mexico |
- South America | Brazil |
- | Argentina |
- | Chile |
- | Rest of South America |
- Europe | United Kingdom |
- | Germany |
- | France |
- | Italy |
- | Spain |
- | Rest of Europe |
- Asia-Pacific | China |
- | Japan |
- | India |
- | South Korea |
- | Australia and New Zealand |
- | Rest of Asia-Pacific |
- |
- Middle East and Africa | Middle East | United Arab Emirates |
- | | Saudi Arabia |
- | | Turkey |
- | | Rest of Middle East |
- |
- | Africa | South Africa |
- | | Kenya |
- | | Nigeria |
- | | Rest of Africa |

Frequently Asked Questions

What is the projected 2030 volume for liquid paperboard cartons?

The liquid paperboard packaging market is expected to reach 5.40 million tons by 2030, growing at a 3.87% CAGR from 2025.

Which carton type is growing fastest?

Shaped cartons are advancing at a 5.35% CAGR as brand owners seek differentiated silhouettes for premium beverages.

Why are bio-based barriers gaining traction in beverage cartons?

They eliminate aluminum foil and cut polyethylene use, enabling cartons to meet European recyclability mandates while reducing carbon footprints.

Which region leads carton demand today?

Asia-Pacific holds just over 40% of global volume, driven by large dairy consumption and school milk programs.

How do cartons compare to cans and glass in logistics efficiency?

Aseptic cartons such as Tetra Recart ship 20% more product per pallet than cans and 50% more than glass, reducing freight costs and emissions.

What drives nutraceutical adoption of cartons?

High-protein and fortified drinks favor cartons for ambient distribution, lower carbon profiles, and a premium, eco-centric brand image.