

Paper-Based Containers in Asia Pacific

June 2021

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Scope

Key findings

REGIONAL OVERVIEW

Asia Pacific leads global market for paper-based containers

Folding cartons makes up the majority of paper-based containers

Spike in demand in 2020, driven by shift to at-home consumption

Folding cartons is gaining share, but only slightly

More mature markets stagnant, China and India leading growth

Southeast Asia dominated by folding cartons

Paper-based packaging largely growing across geographies

General increase across the board, with a few exceptions

Growth in paper-based trays despite its small size

Food packaging is largest contributor, via noodles, biscuits and ice cream

Board tubs: ice cream shows steady growth due to premiumisation trend

Folding cartons: largely sees growth; some exceptions in soap and spirits

Peel-off foil dominates, although other closures growing rapidly

Outside food applications, beverages sees some growth

Upsizing in packaged food in 2020

Outside of food packaging, 0-50 size band sees most application growth

FORECAST PROJECTIONS

Beverages: decline for cartons in 2020, but expected to normalise

Beverages: China baijiu prompts carton decline; growth in other markets

Food: strongest growth expected in China, India and Vietnam

Food: ready meals in Japan and noodles in Vietnam contribute to strong growth

Beauty and personal care: China expected to decline, growth in Indonesia

Beauty: population growth creates potential in Southeast Asia

Home care: Indonesia expected to drive growth in paper-based containers

Home care: insecticides key contributor to folding cartons in APAC

COUNTRY SNAPSHOTS

China – market context

China – competitive and retail landscape

Japan – market context

Japan – competitive and retail landscape

Indonesia – market context

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India – market context

India – competitive and retail landscape

Thailand – market context

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Vietnam – market context

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Hong Kong – competitive and retail landscape

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