



HAWKINS WRIGHT

# Defining the Global Market for Moulded Fibre

A multi-client report available from March 2025

Report prospectus



# Introduction

**Moulded fibre packaging** has emerged as one of the prime candidates for replacing plastic packaging in many applications. Innovation in manufacturing technology, especially thermoformed wet and dry-moulded fibre, has enable this type of product to compete with thermoformed plastic packaging.

The moulded fibre market is challenging to assess. It covers a range of products, and a large share of production happens in small and medium-size enterprises. Only for a few certain product groups do we see meaningful consolidation to a few larger multinational suppliers.

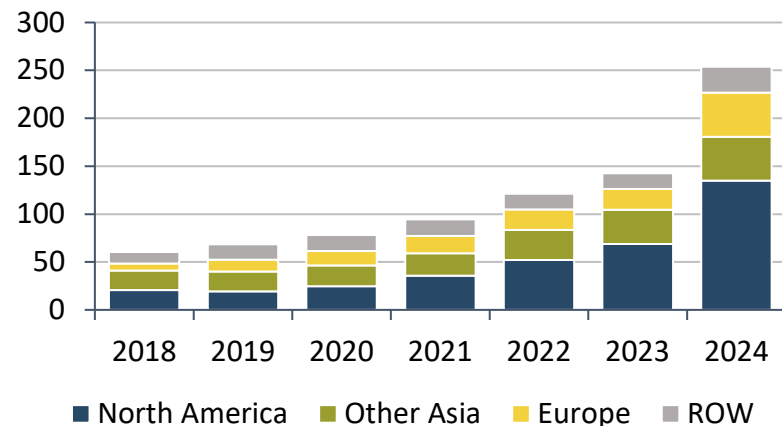
**China, North America** and **Europe** are the primary locations of production, though new capacity is also coming in Asia and Latam. We provide extensive vetted lists of producers in these regions and estimate their capacities.

Raw materials range from wastepaper to BEKP, BCTMP, various non-wood fibres and even fluff pulp. We explain the different raw material choices of producers depending on technology and target applications.

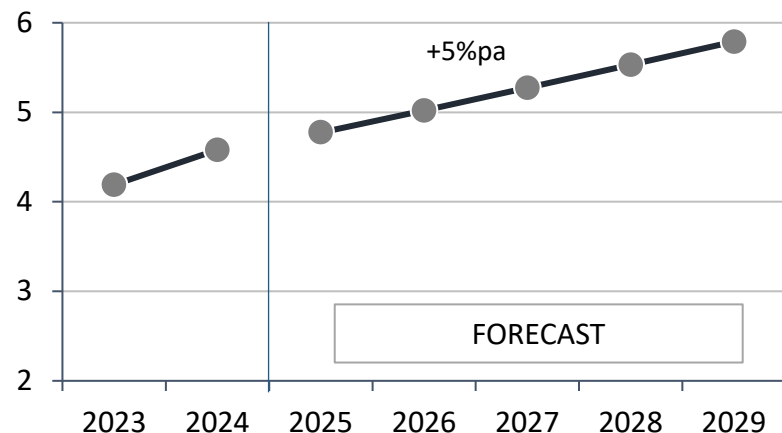
We compare **production costs**, including Capex and tooling costs for various technologies.

**Production forecasts** are presented in tonnes and converted to **pulp demand** by **raw material**, **technology** and **end-use**.

Chinese exports of moulded fibre products by destination (000s tonnes)



Global production of moulded fibre (millions of tonnes)





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### **METHODOLOGY**

Our estimates are produced by combining publicly available statistics and trade data with primary research and discussions with industry players.

Specific attention has been devoted to the more recent developments in the moulded fibre space where virgin fibres are often used as the primary raw material. Europe, China and North America have been given additional attention

**HAWKINS WRIGHT Technologies**

## I Thick-wall

**Thick-wall moulded fibre (type I)** is used for protective packaging, for example in the automotive industry. Raw materials are mainly old corrugated container, as this is a strong fibre that works well for high-load applications. The

**II Transfer moulded**

Page 13 Image source: Semple et al. (2021)

## Major end use areas

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End uses	Description	Growth rate
Industrial protective packaging	Heavy automotive parts and similar industrial components take advantage of the complex shapes that can be produced using moulded fibre. The used packaging is recyclable. Focus is on mechanical strength and stability, noton appearance. Mostly thick-wall production using OCC as raw material.	Low

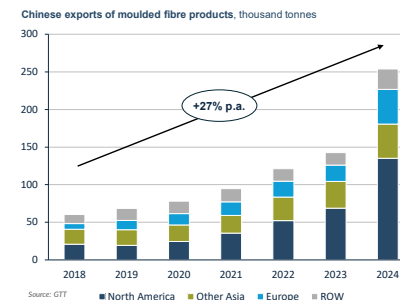
**HAWKINS WRIGHT Raw materials**

Wood-based	Non wood	Recycled
<ul style="list-style-type: none"> <li><b>CTMP</b> has a higher yield and is cheaper than chemical pulp. The higher yield means lignin is retained and fibres are stiffer. Enso and Rotterros use this raw material for their wet moulded fibre products.</li> <li><b>BKP</b> is preferred for high brightness example in Apple's packaging for iP. Hardwood gives better surface finish cheaper, but softwood can be mixed to improve mechanical properties.</li> <li><b>UKP</b> can be mixed in to enhance the properties of recycled product or used where brightness is of less importance.</li> <li><b>Fluff pulp</b>, normally used for hygiene products, is used as raw material for forming due to its roll format.</li> </ul>	<ul style="list-style-type: none"> <li><b>Bagasse</b> is the residual from sugarcane production. Available in many tropical and subtropical regions.</li> </ul>	<ul style="list-style-type: none"> <li><b>OCC</b> is mainly used in thick-wall products where high strength is important, e.g. for</li> </ul>

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## Chinese exports

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While the exports to Europe and North America are more focused on disposable tableware, the exports to Asia are more directed to serving the consumer electronics markets as companies in this space are diversifying their manufacturing base. Vietnam has emerged as a large importer of moulded fibre products from Guangxi and Guangdong provinces.

Chinese exports of moulded fibre products are growing rapidly, with North America as the primary target market.

Apart from waste paper, the primary raw materials used in Chinese moulded fibre production are bagasse and bamboo, as these non-wood fibres are cheaper than softwood pulp while still being well-suited for this application. These products are also targeting a group of consumers that considers non-wood alternatives to be more sustainable. Virgin wood pulp is primarily used for consumer electronics packaging.

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# Availability and cost

Available from March 2025, a subscription to Defining the Global Market for Moulded Fibre is priced at £2400 (existing subscribers to Hawkins Wright services qualify for a discount upon application).

The price includes an electronic copy of the main report; Hawkins Wrights responses to any (within reason) questions on global moulded fibre markets that may arise during the year; and a presentation meetings with one of our consultants. (Such meetings are normally arranged to coincide with major industry events – for example London Pulp Week – or when a consultant is travelling in the region. However, for specially arranged meetings we reserve the right to charge travel and subsistence costs. Such costs will always be agreed in advance.)

## Contact

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