

A Different Kind of Paperboard Partner in North America

The North American packaging market is the largest in the world, but it is also one of the most consolidated. A small number of vertically integrated players dominate the cartonboard market, producing the board, converting it into finished cartons, and in some cases supplying the packaging lines themselves. For brand owners and independent converters, that creates a marketplace with less supplier choice, including a pricing and innovation ceiling that gets harder to push through every year.

Increasing Packaging Independence

Stora Enso offers a different model. We are one of the few major non-integrated paperboard suppliers operating at scale in North America. We sell board. We do not convert cartons. That means independent converters can buy from us without buying from a potential competitor, and brand owners gain a genuine third option in the marketplace. For converters competing for business with the integrated players, that independence matters. For brands, it opens up transparency into materials and converting costs that is otherwise hard to achieve.

Beyond structure, the real story is in the material itself. Depending on the grade and end use, our boards are meaningfully lighter than comparable North American grades while matching or exceeding the strength performance of comparable domestic grades in our internal testing. I call lightweighting the “gift that keeps on giving,” because the savings compound at every stage of the value chain. Less material to ship from the mill. Less waste on the converting floor, less material to recycle.

Innovation Powers Transformation

More packages fit on each truckload, because paperboard reaches payload weight long before the trailer fills up. Weight comes out of the filling line, the warehouse, and ultimately the store shelf or the e-commerce box. For any brand shipping hundreds of millions of units a year, those percentages translate into real dollars. In the growing number of states with extended producer responsibility programs this increasingly means lower compliance fees as well.

EPR fees in most jurisdictions are calculated on the weight of packaging placed on the market, which means lightweighting is one of the most direct levers a brand has to reduce both its environmental footprint and its regulatory cost base. Not all boards are created equal. Quality is a distinction starting to show up as meaningful savings on the balance sheet.

Continuous improvement specialists spend years chasing even small, two percent gains, which makes a 25 percent reduction transformational.

Lightweighting is also where our sustainability story gets concrete. On a kilogram-for-kilogram basis, our boards carry typically at least 60 percent less CO₂ than the domestic baseline, verified through third-party data from AFRY, an independent engineering and consultancy firm. Once you factor in that you need 25 to 30 percent less of our material to do the same job, the total carbon differential approaches 80 percent. That difference is structural, rooted in a Nordic energy grid powered largely by renewable sources, in contrast with the fossil-heavy mix that still defines North American manufacturing.

Innovation Powers Operations

Performance matters, too. Our modern mills produce board with tighter tolerances, less dusting, and higher purity than domestic grades. Converters

running our material have reported up to 30 percent gains in converting efficiency, and brand owners have seen filling-line fault times drop by as much as 40 percent. That is the kind of efficiency gain that pays for the paperboard many times over.

Our open-stock inventory model lets customers order our finest boards at domestic speeds despite our Nordic origin. And with more than 700 years of forest stewardship, Stora Enso can back every claim it makes about sustainability. The core message is simple: if you are a North American brand owner or converter looking for a better partner, there is another option. And the math is on your side.