

## **Africa Flexible Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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### **Report description:**

The Africa Flexible Packaging Market is expected to register a CAGR of 5.35% over the forecast period from 2022 - 2027. Led by rising demand from the packaging industry and increasing demand for consumer goods, the flexible packaging market in the African region is expected to increase in the forecasted period. The way consumers view and interact with packages is changing. Due to the growing focus on sustainability, traditional rigid packaging solutions are being replaced by innovative and more viable flexible packaging. Increasing demand for consumer-friendly packages and enhanced product protection is expected to gain significant traction for flexible packaging as a feasible and cost-effective alternative.

□ The African region accounts for a significant and growing portion of worldwide food and feeds imports. Despite the violence and political uncertainty hanging over parts of the region, the growing populations and rising incomes drive higher demand for primary food and feed grains, soybeans, cotton, and meats. However, growing demand and climate-constrained production potential have forced the region to rely increasingly on food imports, raising its trade profile.

□ Various innovations have made it possible to develop sustainable and customized flexible packaging solutions, leading to an unprecedented rise in the flexible packaging market. Food and consumer goods imports into Africa make up a significant share of the flexible packaging market in the region. Rising demand for packaged foods, a need to keep costs down, and investments in food processing propel the growth of flexible packaging in the region. According to USDA Foreign Agricultural Service, the volume of rice imports to north Africa in 2019/2020 was 630 thousand metric tons, and in 2020/2021, it was 585 thousand tons.

□ Modern retailers are winning a larger share of the region's channel distribution. The shift from grocery retailers and open markets to supermarkets and hypermarkets has continued in Egypt in the last two years. Hypermarkets have shown the fastest growth rates in value share. They continue to offer comprehensive product ranges at competitive prices against traditional grocery

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retailers due to economical bulk packs and attractive price promotions. Moreover, amid political upheaval, curfews and safety concerns have made hypermarkets an engaging consumer environment. Metro, Hyper One, Carrefour, and Spinneys are burgeoning in the significant city outskirts.

□ Due to the effects of the pandemic, around 720 to 811 million people face hunger which was 120 million more than the previous year. The pandemic's more considerable impact was the disruption in the supply chain and the sudden change in demand. For consumers, the food security risk became more noticeable because of the compounded effect of the pandemic from the loss of livelihoods and jobs. The pandemic has highlighted the need for solid preparedness for health crises and the importance of always available and safe food.

#### Africa Flexible Packaging Market Trends

##### Pouches are Expected to Hold Significant Share

□ Pouch packaging is rapidly gaining popularity due to its highly convenient and portable solution. Stand-up pouches benefit and protect contents from moisture, vapor, odor, pests, air, and light. Consumers' preferences for aesthetic appeal and convenience of pouches with value-added attributes such as spouts, zippers, or handles are impacting the growth of stand-up pouches. The lighter weight, reduced material use, and lower shipping cost of stand-up pouches than the rigid packaging benefit the packaged food producers. With the beverage industry increasingly consuming pouches in the region, the demand from the market is expected to increase.

□ According to a recent study by the Flexible Packaging Association, rigid PET containers have a fossil fuel usage of 504% greater than the flexible stand-up pouch with a zipper. The weight of the package is six times heavier. Furthermore, the availability of numerous printing options for pouches helps innovative print designs on the pouch, thus improving the product's aesthetic appeal and reflecting the brand. Growing innovation has seen the emergence of flexible foam, papers, and aluminum foils, replacing the current use of plastic as a raw material for manufacturing pouches.

□ Growing innovation has seen the emergence of flexible foam, papers, and aluminum foils, replacing the current use of plastic as a raw material for manufacturing pouches. Further, African countries are increasing local production and growing investments from Asian and European countries. As a result, the existing foreign players, like Lupin and Dr. Reddy's, are expected to expand their production capabilities. This factor is expected to boost the demand for healthcare packaging, such as blister packs, caps and closures, pouches, and IV bags.

□ Increasing the adoption of pouch packaging for liquids, such as juices, detergents, and edible oil, has seen the emergence of pouches with excellent oxygen-barrier properties to preserve the liquid inside, thus, ensuring that the contents stay uncontaminated. For instance, in 2021, Nestle and Amcor partnered to launch the world's first recyclable flexible pouch for wet pet food. The two companies partnered to overcome the challenges in packaging structures to make them recyclable without compromising their functionalities.

##### South Africa is Expected to Hold Major Share

□ Despite its sophisticated food manufacturing sector and strong consumer market, South Africa faces slow domestic economic growth. Manufacturers face significant challenges in controlling production costs while still meeting consumer demand, which has remained steady. It could see more investment in better packaging to boost efficiencies and help manufacturers manage expenses. South African food manufacturers are also increasingly looking at the export market. They will likely focus on flexible packaging that supports product consistency and quality to meet global food standards.

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□ The South African government is prioritizing the sector: food and beverages are the most significant components of South Africa's manufacturing industry. The government actively encourages further development of agriculture and the agro-processing industry. South Africa's Department of Trade and Industry has, in the last three years, funded the food-processing sector to the value of ZAR 736 million in incentives, while its Enterprise Investment Programme (EIP) incentive has disbursed funds of ZAR 636 million and facilitated investments of ZAR 3.7 billion in the sector.

□ Flexible plastic packages are mainly used for packaging beauty products, as they can protect the inside materials from damages caused by oxidation and improve the shelf life. However, the cosmetics industry faces several challenges in South Africa due to the weakening economic conditions of the country. The country's GDP growth has slowed down significantly. Also, high unemployment and less personal disposable income create challenges for the cosmetic industry. Hence, the flexible packaging related to the personal care market is expected to slow growth.

□ In May 2021, Huhtamaki, a global manufacturer of sustainable packaging solutions, is setting up a manufacturing plant in South Africa to serve its new and existing packaging customers in the area with a wide range of packaging solutions. With this investment, the company will expand its flexible packaging manufacturing geographical footprint into South Africa, further strengthening its emerging market position.

#### Africa Flexible Packaging Market Competitor Analysis

The Africa Flexible Packaging Market is moderately fragmented, with significant players such as Hana Packaging Limited, PrimePak Industries Nigeria Ltd, Constantia Afripack Flexibles Ltd, and Huhtamaki Group occupying most of the market share. The regional companies are forming multiple partnerships and mergers to increase their market share.

□ Jan 2022 - Huhtamaki has fully owned its joint venture company Huhtamaki Smith Anderson from Smith Anderson Group Ltd. (SA). The company majorly deals in the manufacturing and selling of food service paper bags. Paper bags have become an essential part of Huhtamaki's product offerings, and the acquisition enables the company to grow its business further. The purchase took place for approximately EUR 2 million.

□ Sep 2021 - Huhtamaki has acquired Elif for USD 483 Million, a major sustainable, flexible packaging company, to global brand owners, whose products are already nearly all recyclable. This acquisition will help Huhtamaki increase its manufacturing capabilities and capacity.

#### Additional Benefits:

- <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li>

#### **Table of Contents:**

##### 1 INTRODUCTION

###### 1.1 Study Assumptions and Market Definition

###### 1.2 Scope of the Study

##### 2 RESEARCH METHODOLOGY

##### 3 EXECUTIVE SUMMARY

##### 4 MARKET DYNAMICS

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- 4.1 Market Overview
- 4.2 Industry Supply Chain Analysis
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
  - 4.3.1 Bargaining Power of Suppliers
  - 4.3.2 Bargaining Power of Consumers
  - 4.3.3 Threat of New Entrants
  - 4.3.4 Threat of Substitute Products
  - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Impact of COVID-19 on the Industry

## 5 MARKET DYNAMICS

- 5.1 Market Drivers
  - 5.1.1 The Increased Demand for Convenient Packaging
  - 5.1.2 Longer shelf life and changing lifestyle of people
- 5.2 Market Challenges
  - 5.2.1 Concerns related to the environment and recycling

## 6 MARKET SEGMENTATION

- 6.1 By Material
  - 6.1.1 Plastic
  - 6.1.2 Paper
  - 6.1.3 Aluminium Foil
- 6.2 By Product
  - 6.2.1 Bags
  - 6.2.2 Pouches
  - 6.2.3 Wraps & Films
  - 6.2.4 Other Products
- 6.3 By End-User
  - 6.3.1 Food
  - 6.3.2 Beverage
  - 6.3.3 Beauty & Personal Care
  - 6.3.4 Home Care
  - 6.3.5 Pharmaceutical
- 6.4 By Country
  - 6.4.1 South Africa
  - 6.4.2 Nigeria
  - 6.4.3 Egypt
  - 6.4.4 Morocco
  - 6.4.5 Kenya
  - 6.4.6 Rest of Africa

## 7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles\*
  - 7.1.1 Hana Packaging Limited
  - 7.1.2 Sonnex Packaging Nigeria Ltd
  - 7.1.3 Colpak Pty Ltd
  - 7.1.4 PrimePak Industries Nigeria Ltd

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7.1.5 Aristocrat Industries Ltd

7.1.6 CTP Flexibles Ltd

7.1.7 Constantia Afripack Flexibles Ltd

7.1.8 Huhtamaki Group

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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