

Middle East Pulp and Paper Industry - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Middle East Pulp and Paper Market is expected to reach a CAGR of 3.2% during the forecast period (2021 - 2026), owing to rapid changes in the lifestyle, an increase in consumer demand for packaged and fresh food and presence relative young population are some of the major drivers impacting the growth of paper packaging, thus raising the growth opportunities for the pulp market in the region. The outbreak of COVID-19 has negatively impacted this market. Some of the effects of lockdown include disruption of supply chain, lack of availability of raw materials used in the manufacturing process, labor shortages, fluctuating prices that may cause the production of the final product to inflate and go beyond budget, shipping problems, etc.?

Key Highlights

For instance, According to the BMI Risk/Reward Index report, the import net of re-exports was around AED 43 billion, with a domestic consumption size of AED 112 billion. 62% of the domestic food and beverage needs are derived from the local manufacturing industry that accounts for AED 69 billion. And so, the food and beverage sector is by far one of the most critical areas in terms of packaging, leading to increased growth of the pulp industry in the region.

The domestic market in the region is still weak due to the strong presence of international players and high energy prices, taxes, customs, and the dumping of imported papers. To cater to this problem, manufacturers are getting support from the government which are lowering natural gas prices and imposing protective tariffs on the imported paper to protect the domestic industry. Africa's pulp and paper sector have continued to operate as a critical business continuity service during the pandemic, supporting the manufacturing, processing, and distribution of essential goods such as tissue, toilet paper, paper packaging, face masks and personal hygiene products whereas in the Middle East with Iran, Saudi Arabia, Qatar, and UAE affected by significant coronavirus cases has reported increased local production in terms of the food industry. Also, the United Arab Emirates and Saudi Arabian governments have announced plans to boost their economy by investing AED 100 billion and SAR 120 billion, respectively. This is expected to foster lending and liquidity to SMEs in respective countries.?

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The increased demand for food delivery services in the Middle East region is expected to have a positive impact on the pulp and paper market as the demand for corrugated boxes and paper packaging increases. The ongoing spread of coronavirus has further proliferated the market for food delivery. For instance, in June 2020, Nana Direct, an online grocery shopping, and home delivery service in Saudi Arabia raised USD 18 million for expansion across the Middle East in order to meet the rising demand for delivery services created by the COVID-19 pandemic.

MEA Pulp & Paper Market Trends

Cosmetic Industry is Expected to Drive the Growth of the Market

The UAE and Saudi Arabia are estimated to motivate the demand for cosmetic products during the forecast period owing to the growing demand for halal cosmetic products that have motivated the market within the state. Therefore, the growing demand for cosmetic manufacturing is responsible for an upsurge in demand for the manufacturing of cosmetic packaging.

The consumers in the UAE have a wide variety of choices in terms of cosmetics and fragrances. Hence, to capture the maximum market share and enhance their market presence, the cosmetics and fragrances companies are enhancing their packaging with a variety of materials, some of which are designed for sustainability.?

Additionally, the consumers in the United Arab Emirates spent USD 247 per capita on cosmetics and personal care, more than any other country in the Middle East. The expenditure is forecast to grow to USD 294 by the end of 2020, with most people giving importance to their lifestyle, which fuels the upswing in the UAE cosmetics and skincare segments.

The country is also witnessing significant investments from across the world in the cosmetics industry to stimulate innovative and sustainable packaging solutions. Recently, the Beautyworld Middle East 2019, the region's largest international trade fair for beauty products, hair, fragrances, and wellbeing, was held in Dubai, which featured approximately 1,790 exhibitors from 66 countries.?

Africa is Expected to Witness Significant Growth

South Africa has witnessed high levels of urbanization over the last few years. As per a recent study, around 64% of South Africans are living in urban areas, and this is expected to rise to 71% by 2030. By 2050, eight in ten people are expected to live in urban areas.

As urbanization is picking up, and metros such as growing cities of Johannesburg, Durban, and Cape Town are attracting a younger generation of consumers, who are changing their consumption habits and are increasingly buying processed and packaged foods. This also creates more demand for Ready or on-the-go meals, which directly drive the demand for pulp and paper-based packagings and products such as tissue papers.

Moreover, South Africa is in the enviable position of being able to recycle up to 90% of its recovered waste paper locally into paper packaging, serving the agricultural, manufacturing and retail sectors which is far better than a country like Sweden which has high collection rates but only recycles 11%; the majority feeds waste-to-energy plants.

The players in the market are adopting the latest technologies and machinery to expand their presence in the regional market. For instance, in March 2020, South African tissue manufacturer Picknik Marketing Pty Ltd started up a MODULO-PLUS tissue machine supplied by Toscotec at its Johannesburg mill.

Moreover, the growing public-private partnerships in the region are expected to proliferate the market growth. Ghana is expected to produce its paper by establishing a pulp mill to boost the paper industry in the country and also for export to the West African sub-region. The 2.8 billion dollar project, which is under a Public-Private Partnership (PPP) agreement, is a joint venture between the government of Ghana, and Greenland Resources AB of Sweden is expected to produce 1.5million tons of pulp and paper

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annually to feed the paper industry in the country.

MEA Pulp & Paper Market Competitor Analysis

The market for pulp and paper in the Middle East region is partially consolidated, with the top five players having a significant position in the market and is expected to rise at a moderate rate, due to the well-performing industries starting from printing, consumer packaging, pharmaceutical, and construction, etc.

June 2020 - International Paper, a producer of renewable, fiber-based packaging, pulp, and paper, announced the launch of an innovative Space Divider series to cater to the demands of the new normal as some countries around the world are reducing COVID-19 related restrictions. The corrugated separators are offered in many different shapes and forms, enabling businesses, restaurants, schools, and public administration offices to meet social distancing requirements to keep people safe and prevent the spreading of the coronavirus.

December 2019 - United Carton Industries Company (UCIC), based in Saudi Arabia, has confirmed the installation of an EFI Nozomi C18000 six-color, single-pass LED inkjet printer provided by Electronics For Imaging, Inc. The printer is expected to bring new opportunities for UCIC to enter new market segments, expand its customer base, and create a competitive advantage in the region.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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