

Africa Bopp Films Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Africa BOPP films market is expected to grow at a CAGR of 3.4% over the forecast period. The demand for BOPP films in the African region is driven by the growing population and rapidly developing economies which increased retail sales with increased spending for food and other goods.

Key Highlights

Due to the growing interest in sustainability, traditional rigid packaging solutions are replaced by innovative and more practical flexible packaging. The increasing demand for consumer-friendly packaging and improved product protection is expected to drive the demand for BOPP film in packaging as a viable and cost-effective alternative in the country.

The increasing trend of a busy lifestyle in the country imposes consumers to go for convenience goods, creating market growth for BOPP films. Products that are simple to open, store, use, carry, and dispose of are in high demand due to changing consumer preferences brought on by busy lifestyles and reduced household sizes in the country. However, the growing development of environmentally friendly BOPP films is expected to restrain the market growth.

Market players are focusing on increasing the production line for films. Tempo Packaging announced an increase of 30% in its production capacity till 2022; Flexipack planned to open two BOPP lines. Further, some market players are focused on investing in CPP (Cast Polypropylene) lines and blow film lines.

The COVID-19 pandemic led to a significant increase in the demand for BOPP films with an increase in demand through the surge in online shopping, food takeaway, and retail sales, which have led to an upsurge in the amount of BOPP film used. At the same time, the accelerated shift towards e-commerce resulted in a permanent plateau in production. Furthermore, the Russia-Ukraine war has an impact on the overall packaging ecosystem.

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Africa BOPP Films Market Trends

Growing Demand from the Retail Sector

The demand for BOPP films in the African region is driven by the opening up of the retail sector in the emerging market and associated consumer spending on packaged food and other goods. In order to cater to the increasing demand, vendors are innovating new products and focusing on expanding their businesses. In December 2021, Flex P. Films Egypt, a part of India-based packaging materials and solutions company UFlex inaugurated a new production line for manufacturing and exporting high-barrier plastic films for the first time in the Middle East with a total investment of USD 100 million.

In East Africa, there is already a noticeable shift from the informal to the formal retail sector. Companies like Walmart and The Carrefour Group are expanding their reach across the continent. In August 2022, Walmart moved to acquire South Africa-based retailer and wholesaler Massmart to enter into the high-growth retail market in South Africa and bought outstanding shares of Massmart for ZAR 62 per share (USD 3.65).

In addition, with the growing population and steady recovery from the COVID-19 pandemic, the retail industry in Nigeria is showing promising growth and expansion, with the increasing number of retail players contributing 16% of the country's GDP. Moreover, in March 2022, South Africa's Shoprite Group, the largest grocery retailer in Africa, reported significant growth in its sales and profits. The retailer stated that the sale of merchandise increased by 10% to ZAR 91.1 billion (USD 5.9 billion) compared to the last year within the same period, regardless of the impacts of COVID-19 lockdown regulations.

South Africa Expected to Hold Significant Share

The South African government is prioritizing the sector. Food and beverages are the most significant components of South Africa's manufacturing industry, with the government actively encouraging further development of agriculture and the agro-processing sector. South Africa is witnessing increased demand for food and beverage packaging, where films are used in larger amounts. Retail sales in South Africa increased rapidly as the food retail sector expanded. According to the US Department of Agriculture, South African retail food sales totaled USD 40 billion in 2021 as the South African economy began to recover from the COVID-19 pandemic's effects. The expansion coincided with the relaxation of COVID-19 regulations and rising in-store shopping rates, increasing the demand for BOPP films.

Several innovations have enabled the development of sustainable and customized flexible packaging solutions, increasing the packaging market in South Africa. Exports of food and consumer goods from South Africa account for a significant portion of the country's packaging solutions. Rising packaged food demand, the need to keep costs low, and investments in food processing is driving the demand for BOPP films in packaging applications.

Africa BOPP Films Market Competitor Analysis

The African BOPP films market is fragmented, with the presence of several players operating with a considerable share of the market. The vendors operating in the market are undergoing organic and inorganic strategies in the market such as capacity expansion, mergers, acquisitions, product innovations, and others, to gain a competitive advantage for constituting a larger market share. Flex Films, elm films, COPACK Company, Taghleef Industries S.A.E, and Cosmo Films Ltd are some of the key market players.

In November 2022, Tempo Paper Pulp and Packaging PLC commissioned Cast Polypropylene (CPP) Line with an annual installed capacity of 11,000 MT. The installation of this new line increased the company's annual polypropylene film's installed capacity

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from 33,000 MT to not less than 44,000 MT. This new line commissioned is at Ota, Ogun State, which already houses a BOPP line and metalliser factory.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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