

Middle East & Africa Glass Bottles And Containers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Middle East & Africa Glass Bottles And Containers Market size is estimated at USD 1.91 billion in 2024, and is expected to reach USD 2.29 billion by 2029, growing at a CAGR of 3.73% during the forecast period (2024-2029).

Key Highlights

- The demand for glass bottles is rising across the African region due to the rising consumption of alcoholic beverages. Glass bottles are commonly used for packaging alcoholic beverages, including beer. One of the key factors fueling market expansion is the rise in beer consumption around the region. According to Statistics South Africa, the Consumer Price Index (CPI) in South Africa increased from 91.30 points in May 2019 to 104.4 points in May 2022.
- Increasing personal disposable income drives sales in different end-user industries, such as beverages, food, cosmetics, and pharmaceuticals. According to the SARB Personal Finance June 2021 edition, personal disposable income increased by 2.3% year-over-year. Over the past few years, the region has witnessed a growing focus on the glass bottles and containers market by setting up new plants.
- Companies operating in the region are more focused on sustainable packaging and are investing in the same. For instance, in the past two years, Ardagh Glass Packaging Africa (AGP - Africa) has invested twice to ramp up the facility's capacity of glass packaging in Nigel to meet the growing demand in Africa.
- Alcoholic drinks are the prominent end-user category of premium glass packaging due to glass's inherent characteristics, such as its barrier, premium look, chemical inertness, and easy recyclability. Regional players are launching premium products in evolved packaging to meet increased disposable income and urbanization demand. In August 2021, Castle Lager announced South Africa's first double malt lager with the introduction of Castle Double Malt. The premium double malt premium beer is launched in a 410ml pearl, green, and gold can and a premium 340 ml green bottle.
- Despite significant risks, investment in emerging markets is expected to boost profits. The top emerging economies are those of

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the BRICS (Brazil, Russia, India, China, and South Africa) countries. The classification of lower-tier economies may be done in a few different ways. Also, in November 2022, Saudi Pharmaceutical Industries & Medical Appliances Corporation (Spimaco), a market participant in the Kingdom's pharmaceutical industries sector, invested SAR 272 million (USD 73 million) in developing the new facility in the Qassim area. The new 2,800 square meter facility, which manufactures numerous risky pharmaceuticals, was established with AstraZeneca, a well-known international pharmaceutical business. Thanks to the investment, different glass packaging businesses in the nation would have prospects.

-However, traditionally, aluminum and glass are preferred materials across pharmaceutical packaging. Over time, these materials got expensive (due to raw material prices and other factors) and could not provide economically viable solutions for packaging products across mass consumption. That marked the advent of plastics as an option.

-The impact of COVID-19 on glass bottle manufacturing was depicted as an indirect linkage towards an important business that has been allowed to function. The Ethiopian glass container manufacturer, Addis Ababa Glass, and Bottle Share Company overlooks the capacity expansions. Additionally, amidst COVID-19, the South African area sought stringent measures, such as halting all alcohol production in the country and the concerned authorities to counter the spread of COVID-19. Besides, Fitch, a credit rating agency, estimated that the Coronavirus outbreak would negatively impact the short-term growth across sub-Saharan African areas, particularly in Ghana, Angola, Congo, Equatorial Guinea, Zambia, South Africa, Gabon, and Nigeria. This is due to such countries having close export relations with China.

Middle East and Africa Glass Bottles and Containers Market Trends

Pharmaceuticals Segment is Expected to Boost the Market Growth

- The healthcare industry in the MENA region has set strict regulations for drug delivery products due to the increasing importance of biotech and price-sensitive drugs. Numerous businesses in the pharmaceutical glass manufacturing sector are investing in pharmaceuticals due to their focus on packaging, which aims to extend a product's shelf life.

- For instance, identifying the opportunities available in the region, GlaxoSmithKline and Saudi Chemical Company Holding (SCCH), as early as June 2021, made a contract to produce pharmaceuticals in Saudi Arabia. AJA Pharmaceutical Industries, a division of SCCH, is expected to collaborate with GlaxoSmithKline Consumer Healthcare Saudi in a five-year, SAR 100 million (USD 26.66 million) manufacturing agreement. Additionally, the new alliance would contribute to expanding Saudi Arabian jobs in the country's pharmaceutical industry.

- Additionally, it is anticipated that increased lifestyle diseases and strong brand loyalty to foreign medicines in the region are projected to drive up pharmaceutical demand throughout the forecast period. Rising per capita income, a developing healthcare infrastructure, and higher penetration of health insurance firms in the Kingdom are other factors driving the growth of the pharmaceutical industry.

- Moreover, Saudi Arabia's rapidly expanding pharmaceutical packaging demand is primarily due to the rise in non-communicable diseases. Improving healthcare infrastructure and increasing healthcare expenditure are expected to support market growth. Further, according to Alpen Capital, the spending on healthcare for Saudi Arabia totaled USD 60.7 billion in 2022 and will likely reach USD 77.1 billion by 2027.

- Also, Pharmaceutical packaging in Saudi Arabia is dominated by MNCs, who hold a substantial market share. Rising healthcare costs and growing health awareness stimulate market growth during the forecast period.

South Africa is Expected to Experience Significant Growth

- South Africa is experiencing growth in glass bottles and containers with the establishment of several plants, expansion of the

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production capacity of existing players, and the entry of new players. In July 2022, Ardagh Glass Packaging Africa (AGP Africa), a subsidiary of Ardagh Group, commissioned a ZAR 1.5 billion (USD 95 million) extension of its Nigel production facility in Gauteng. The extension has increased the facility's ability to produce environmentally friendly glass packaging, which has more than doubled due to the Addition, including a new furnace and production lines.

- Further, in November 2022, Ardagh Glass Packaging Africa (AGP Africa) announced plans to add a third furnace (N3) to expand the glass capacity of its Nigel production facility in Gauteng, South Africa. The expansion announcement follows the recently commissioned ZAR 1.5 billion (USD 95 million) Nigel 2 expansion. The N3 will further ramp up the facility's capacity of glass packaging to support the present and projected growth in demand in the upcoming years.

- Similarly, In February 2023, Altajir Glass Industries' glass factory (Jebel Ali Container Glass Factory), glass bottles and containers manufacturer located in the Jebel Ali industrial zone of Dubai, manufactured glass bottles with a daily output of 4.5 million units. Such regional expansion and investment will boost and support market growth, bolster the government's economic recovery plans, and offer job opportunities in Ekurhuleni. This represents a significant inward investment into South Africa and other markets in which the company operates.

- It's also anticipated that non-alcoholic beverages like fizzy drinks will be included in more localized glass bottles. In line with the same, Coca-Cola declared in February 2022 that it would sell 25% of its beverages in returnable and reusable glass bottles by 2030, focusing most of its efforts on the markets in Africa, Latin America, and the Southwest of the United States. In Addition, according to Krones AG, a German packaging and bottling machine manufacturer, the consumption of packaged beverages in Africa and the Middle East stood at 118.4 billion liters in 2021 and is projected to reach 127.1 billion liters in 2024. Similar trends will be seen during the forecast period, boosting market growth.

Middle East and Africa Glass Bottles and Containers Industry Overview

The Middle East and Africa Glass Bottles and Container market are highly competitive and fragmented, primarily due to multiple players operating in the domestic and international markets. The players in the market are adopting strategies like partnerships and expansions to increase their product functionality and expand their geographic reach.

In January 2023, Coca-Cola Beverages Africa (CCBA), a franchise of American multinational beverages company Coca-Cola, announced plans to introduce new 1.25 returnable glass bottles that aligned with its sustainability and transparency goals.

In July 2022, Madhvani Group, an Africa-based Hindware products maker, AGI Greenpac, submitted a separate resolution planned to acquire bankruptcy, Kolkata-based bottle maker Hindusthan National Glass & Industries.

Additional Benefits:

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

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