

Middle East and Africa Aseptic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Middle East and Africa Aseptic Packaging Market size is estimated at USD 5.27 billion in 2024, and is expected to reach USD 8.66 billion by 2029, growing at a CAGR of 10.47% during the forecast period (2024-2029).

The ability of the packaging material to meet the demands for high, consistent product quality and excellent nutrient retention, as well as its capacity to avoid the bisphenol A (BPA) controversy, which is frequently found in can liners, are the main drivers of growth in the aseptic packaging market. All these requirements have been met by aseptic packaging, which also extends the shelf life of some items by an estimated six to twelve months without refrigeration.

Key Highlights

- Saudi Arabia is a prominent market in the Middle East and Africa region because of the growing pharmaceutical industry and increased R&D spending in the sector. Saudi Arabia's growing investments in the life sciences sector offer a tremendous opportunity for the aseptic packaging business in the pharmaceutical industry. For instance, in June 2022, Bandar Alkhorayef, the Saudi Minister of Industry and Mineral Resources and the Chairman of the Manufacturing Committee for Vaccines and Vital Medicines, announced the launch of many investment opportunities in the USD 3.4 billion vaccines and vital medicines sector. Saudi Arabia will become a significant hub for this promising industry thanks to the prospects that will help the country realize its pharmaceutical and health security goals.
- Similarly, the Middle Eastern region is witnessing various investments in the food and beverage sectors, driving the market studied. For instance, in April 2022, A USD 170 million fundraising round for the Saudi Arabian food and beverage technology startup Foodics was supported by Sequoia Capital India and Prosus NV, as international investors increasingly look to keep rapidly expanding Middle Eastern businesses. The money will be used by Foodics, a company located in Riyadh, to improve its offerings and grow internationally. The firm is considering possible acquisitions of rivals to aid in its expansion and plans to enter the

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fintech market once the Saudi central bank has granted it a license.

- Rapid urbanization and the variety of consumer goods are key factors promoting the development of aseptic packaging. The adoption of aseptic packaging is also driven by the rising demand for processed foods and disposable medical supplies.
- The regional aseptic packaging market is in its nascent stage. However, growing concerns regarding health and the shelf-life of products are some of the significant factors driving the growth of aseptic packaging in the region.
- Further, With the recent outbreak of COVID-19, aseptic packaging manufacturers have been flooded with a pool of issues that are expected to be present only for the short term. Some of the effects of lockdown include supply chain disruptions, lack of availability of raw materials used in the manufacturing process, labor shortages, fluctuating prices that could cause the production of the final product to inflate and go beyond budget, shipping problems, etc.
- Moreover, concerns regarding food hygiene due to COVID-19 are increasing the demand for aseptic packaging. In the coming years, customers will likely prefer disposable packaging to prevent themselves from more diseases, which would compel the vendors to think along the lines of sustainable aseptic packaging.

MEA Aseptic Packaging Market Trends

Increasing Demand for Longer Shelf Life of Products

- Consumers have been demanding products with extended shelf life and easier usage. This has necessitated the companies to develop alternate packaging solutions. With companies looking to expand their product offerings with less dependency on sophisticated cold storage chains, producing packages that provide longer shelf life has become imperative.
- The shelf life can be increased by protecting the products from potential deteriorating agents, such as oxygen, moisture, and microbes. To protect their products, companies need a packaging solution that can achieve the same and is cost-effective. Reducing wastage throughout the food supply chain is likely to become a crucial activity to reduce the environmental impact of agriculture and serve the increasing food demand. Therefore, investing in efficient, low-cost, and sustainable processing and packaging solutions to increase the shelf life of products (especially dairy, baby food, and nutraceuticals) is a viable solution, thus augmenting the requirement for aseptic packaging.
- Changing lifestyles and the consequent dependence of consumers on processed, packaged, and pre-cooked food is increasing the demand for aseptic packaging solutions. The advent of the supermarket culture has also altered the shopping landscape and has increased the need for packaging, especially in food and beverage products. The altering lifestyle of people has resulted in the shift from home-cooked to ready-to-eat products. In addition to this ease of use, these products should also be packaged in such a way as to ensure they are fresh and uncontaminated.
- Food packaging has no longer just a passive role in protecting and marketing a food product. The emphasis on decreasing preservatives is also a driving factor for the use of aseptic packaging, as aseptic food preservation methods enable processed food to be kept for a longer period without preservatives as long as they are not opened.
- According to International Trade Administration, Africa exported dairy products to the United States worth about USD 34 million in 2021. This amount was around USD 8.19 million in 2013. Aseptic packaging may be necessary to preserve dairy goods at reasonable costs due to the rising trend of exporting dairy products.

Pharmaceutical & Medical Sector is Expected to Witness Significant Growth During the Forecast Period

- Prefillable syringes overcome the disadvantages of parenteral drug delivery, such as lack of convenience, affordability, accuracy, sterility, and safety. These syringes enable easy management of chronic diseases, such as Diabetes and Rheumatoid Arthritis, which is expected to boost the use of auto-injectors and pen injectors over the forecast period. Thus, the growing prevalence of

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Diabetes and other chronic diseases in the Middle East and Africa region is expected to fuel the market demand over the forecast period.

- Prefilled syringes are emerging as one of the fastest-growing choices for unit-dose medication as the pharmaceutical industry seeks new and more convenient drug delivery methods. Also, Pharmaceutical companies minimize drug waste and increase product life span, while patients can self-administer injectable drugs in their homes instead of the hospital.
- Also, In 2021, according to International Diabetes Federation in the Middle East & North Africa region, 73 million persons (20-79) have Diabetes. It is anticipated that 95 million adults will have Diabetes by 2030 and 136 million by 2045. People with Diabetes are expected to grow 134% in Africa among those aged 20 to 79 between 2021 and 2045. At the same time, there will likely be an 87 percent surge across the Middle East and Africa. Thus, increasing insulin market growth is expected to drive the prefillable syringes market, which would further aid the development of the Aseptic Packaging Market.
- Around 80% of the vials and ampoules are made from glass, owing to their suitability with varied drug combinations, but they face challenges like delamination, breakage, etc. Alternative plastic vials, like Cycle Olefin Polymer (COP) and Cycle Olefin Co-Polymer (COC) formats, will likely gain significant market share over the next five years. Major players, such as Schott and Amcor, possess experience in COC for pharmaceutical applications. Such developments are driving the need for aseptic packaging in the region.
- Moreover, United Arab Emirates announced its plans to place itself as the global hub for various international pharmaceutical companies, with the number of manufacturing factories set to double by 2022. Favorable government regulations in the country may further enhance the healthcare sector, which is also expected to drive the demand for aseptic packaging in the region.
- For instance, in February 2022, a paper that examines the prospects and investments that would position the UAE to become a key regional center for pharmaceutical production was released by ADQ, an investment and holding firm with its headquarters in Abu Dhabi. The ADQ FWD paper focuses on how the UAE may realize its full potential to boost regional pharmaceutical capacity and establish seamless access to affordable medicines and innovative therapies.
- Also, in March 2022, a strategic alliance with the United Arab Emirates(UAE)-based Pharmax Pharmaceuticals was announced by Novartis, a prominent global pharmaceutical business. The collaboration covers the commercialization and co-marketing of Novartis products to Pharmax to improve patient access to medications and treatments for various Cardiometabolic diseases such as Diabetes and Hypertension. The collaboration is in line with the UAE's Ministry of Health and Prevention's vision to encourage partnerships between research-based pharmaceutical companies and manufacturers in the United Arab Emirates.

MEA Aseptic Packaging Industry Overview

The Middle East & Africa Aseptic Packaging Market is moderately competitive as a few vendors operate in domestic and international markets. The market appears to be highly concentrated, with the players adopting various strategies such as product innovation, mergers, and acquisitions, among others, primarily to expand their reach and stay competitive. Some of the major players in the market are Schott AG, and Tetra Pak International, among others.

- October 2021 - New Kenya Co-operative Creameries (NKCC), a Kenya-based prominent dairy industry, has selected IPI s.r.l. as a supplier for its new 500 ml thin packaging for Ultra Heat Treated (UHT) Milk. The Italian supplier, a pioneer in aseptic brick packaging of food and beverages, has installed the first system of its sort in Kenya. To package the 500 ml Slim brick, which was added to the current UHT milk cartons, the Italian company gave its customer an NSA EVO aseptic packaging process.
- October 2021 - Tetra Pak South Africa has announced an investment of ZAR 500 million to upgrade its aseptic packaging materials factory in Pinetown, KwaZulu-Natal, to ensure that the factory complies with international safety and sustainability standards. Along with enabling the business to serve the Southern African market, the investment helps the company pledge to become carbon neutral by 2030. The company continues by stating that the plant renovation will enable Tetra Pak to produce the entirety of its product line and packaging, create more jobs in the area, support the local supply chain, and significantly reduce lead times.

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