

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

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Report description:

The Middle-East and Africa Corrugated Packaging Market size is estimated at USD 8.83 billion in 2024, and is expected to reach USD 9.88 billion by 2029, growing at a CAGR of 2.28% during the forecast period (2024-2029).

Corrugated packaging is a preferred option for food and beverage packaging. It can be found in various foods, including soups, seasonings, and dairy products. Compared to glass and metal, it helps reduce the final product's total weight while maintaining its freshness.

Key Highlights

- The need for green packaging materials, particularly paper packaging solutions, is fueled by the enforcement of strict legislation regarding the ban on single-use plastic. In addition, the increasing use of e-commerce platforms in the region is boosting market demand. Fluctuations in raw material prices affect the production costs of corrugated products. Changes in production costs change manufacturers' profits. Pulp is harvested from trees and is in high demand in certain regions, and it is imported and exported in specified amounts.
- Food and beverage segments are expected to drive the region's demand for corrugated packaging. The need for convenience foods is on the rise due to the busy lifestyle of individuals. As corrugated packaging keeps moisture from the products and withstands long shipping times, companies are increasingly adopting it for a better customer experience. Processed and packaged foods, such as bread, meat, and other perishable items, drive the demand.
- The United Arab Emirates has an increased rate of packaged food consumption, owing to rapid urbanization and an increasing number of tourists and ex-pats that often prefer safer processed foods. This trend is expected to boost the market's growth in the region. The rising retail industries and the growing need for eco-friendly packaging materials are driving the market's expansion.
- The region's extreme weather conditions may act as a restraint for the market. Manufacturers must focus more on drying

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cardboard boxes when humidity levels are high. These factors can limit the market's ability to increase earnings.

-Despite a significant effect on the supply side of the packaging during the COVID-19 pandemic, considerable growth in end-user demand in specific applications significantly expanded the scope of the corrugated packaging industry.

MEA Corrugated Packaging Market Trends

Increased Demand from the E-commerce Sector to Drive the Market

- The growth of e-commerce dramatically changed the retail market. This megatrend that changed the dynamics of consumer behavior and retail business models is witnessing growth in the Middle East and offers significant potential for industry players. The main drivers of e-commerce growth in the Middle East, especially in the Gulf region, are high per capita income spending potential, well-developed transportation and logistics networks, increased internet penetration, and advanced technology.

- A growing young population that is tech-savvy and few market players are making the market an attractive destination for e-commerce investments. The region's e-commerce market is projected to grow due to low market barriers, high investment potential, improved infrastructure, easier licensing, and improved storage facilities.

- According to the International Trade Administration, Africa will have over 500 million e-commerce users by 2025. Grocery grew by 54% due to the pandemic and lockdown restrictions. Growth was also seen in most food delivery platforms, both in the grocery and fast food/convenience sectors. Consumers are price-sensitive and enjoy online promotions and coupons. South Africans spend much time looking for better prices online and checking social media for product recommendations. Such factors would leverage the market for corrugated packaging in the e-commerce sector.

- The evolving technological environment, increasing use of smartphones and social media, and changes in the region's traditional online shopping through e-commerce are driving significant growth. Many business owners and entrepreneurs are setting up online stores to trade and sell through social media platforms.

- For instance, one of the African e-commerce leaders, Jumia, released its Q2 2021 results, and one of the findings was an increase in orders on its e-commerce platform. The company's e-commerce platform witnessed an increase of 13% Y-o-Y, and total orders increased by almost 60%. The above figures show the increasing adoption of e-commerce on the African continent, and e-commerce services in Nigeria have benefited in the last few years.

- E-commerce companies are proving to be significant enablers of economic growth and social development in the country, despite the myriad challenges faced with the complex business environment. By providing online platforms for merchants, these companies continue to drive the growth of small and medium-sized businesses in the country, allowing them to reach a broader target audience.

United Arab Emirates to Register Significant Growth

- With the growth of end-user industries, primarily food and other non-food sectors, the demand for corrugated packaging is expected to grow over the forecast period. The food habits of the studied demographics are changing due to the increasing adult population. In the food sector, there is a strong demand for products like packaged foods, vegetables, and fruits. Ready-to-eat meal products are among the top adopters of cartons as the secondary form of packaging.

- Increasing tourism in the country led to the demand for packaging food or ready-to-eat substitute for three-course meals. In recent years, government and private packaging firms have switched to bio-degradable solutions, thus increasing the demand for corrugated packaging solutions.

- The accelerated growth of the UAE corrugated market is due to the increasing environmental awareness of the population, the demand for sustainable packaging solutions, the growing e-commerce market, and the increasing demand for electronic products

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and household and personal care products, along with economic development and rising per capita incomes.

- A growing concern from governments and regulators across the country relates to sustainable packaging and its cost benefits, which is driving the growth of the domestic corrugated market. For instance, the Abu Dhabi government introduced new policies to reduce single-use plastics. Due to its sustainability and recyclability properties and the ban on single-use plastics, the demand for corrugated packaging is expected to grow in many end-use industries.

- Propaper Dubai 2022 exhibition organizer, Verifair, stated that the UAE packaging market is projected to grow significantly to an estimated AED 21 billion over the next five years. Propaper 2022 was held amid the growth landscape of the MEA and Asia-Pacific paper industries, with niche segments, such as corrugated packaging, showing exponential growth, especially in the post-COVID scenario. The demand for corrugated boards in end-use industries such as medical, pharmaceutical, and personal care is increasing as consumers move toward e-commerce channels.

MEA Corrugated Packaging Industry Overview

The Middle East and African corrugated packaging market is fragmented. Some key market vendors operating in the region include Arabian Packaging Co. LLC, Napco National, Flacon Pack, and Cepack Group.

- In December 2022, Universal Carton Industries Company (UCIC), one of the United Arab Emirates' leading corrugated cardboard box manufacturing companies located in Ras Al Khaimah Economic Zone (RAKEZ), invested AED 55 million (USD 14.97 million) to expand its production volume to meet the growing demand for sustainable packaging solutions in the country and overseas. This expansion may help increase UCIC's production capacity by threefold to 100,000 tons per annum.

Additional Benefits:

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

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