

South Africa Plastic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The South Africa Plastic Packaging Market size is estimated at USD 2.59 billion in 2024, and is expected to reach USD 2.99 billion by 2029, growing at a CAGR of 2.89% during the forecast period (2024-2029).

Key Highlights

- In South Africa, plastic manufacturing has contributed to approximately 1.9% of the country's GDP and constitutes around 16.6% of the manufacturing sector, and has been defined as a crucial sector by the government. The biggest contribution of plastic production is the plastic packaging market, at around 53%, indicating the high potential of the market in 2018.
- 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 increase to 71% by 2030. By 2050, 8 in 10 people are expected to live in urban areas. Urbanization is picking up, and metros, such as the 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, directly driving the demand for Lids, trays, and flexible packaging.
- The country has also experienced growth in convenience stores, retailing, and fast food, including smaller formats, express stores, and small grocery shops, resulting in significant growth in the retail market.
- Moreover, there are applications where plastic packaging solutions offer functionality that is difficult to replicate with any other packaging material-for instance, barrier properties for food or product preservation. Within plastic solutions, flexible plastic packaging uses over 70% less plastic raw material than rigid-based packaging products, thereby reducing raw material input requirements.
- The market in the country had witnessed a slow growth in the past. With consumers being highly budget-constrained, the demand for value-for-money products is high in the country. However, with the quality perception of consumers being heavily

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dependent on the packaging, companies are finding a balance between cost and quality for packaging.

South Africa Plastic Packaging Market Trends

Aggressive Recycling Rates of Plastic Products within the Country and an increase in Waste Generation

- With the massive amount of plastic waste in the country, the recycling trend is growing at a healthy rate in the country, with government regulations and high consumer awareness. Companies, such as Coca-Cola, in South Africa, collected and recycled more PET than what was produced within the country.
- Furthermore, countries in Africa are making considerable efforts to increase local production, with the help of increasing investments from Asian and European countries. As a result, existing foreign players, like Lupin and Dr. Reddy's, are expected to expand their production capabilities in the region. This factor is expected to boost the demand for healthcare packagings, such as blister packs, caps and closures, pouches, and IV bags.?
- Plastics SA recently released a recycling report that stated that South Africa is amongst the best countries in the world with regard to plastics recycling. They noted that even developed nations with the sophisticated collection and sorting systems do not recycle as much plastic as South Africa.
- Incidences of infections are marking their presence in various countries across the world, thus increasing the need for sterilization of medical products and devices and contributing to the growth of the pouches segment. Therefore, companies are investing in technical innovations in sterile packaged pouches for medical devices.
- In January 2020, South African companies, including Unilever, Coca-Cola Africa, Danone, SPAR, and Massmart, announced to force Plastic Pact to reduce plastic usage, following similar commitments from the United Kingdom, France, Chile, and the Netherlands. The companies are aiming at all plastic packaging reusable, recyclable or compostable by 2025. Additionally, they are aiming to recycle 70% of plastic packaging and use 30% recycled content across any plastic packaging. More than 450 organizations have signed up for this vision as part of the New Plastics Economy Global Commitment.

Increasing Alcohol Consumption in the region

- According to a report published by Business Insider, 450 million liters of wine were sold in South Africa, out of which 177 million liters (about 39%) were sold in glass bottles. The demand for wine and CBD drinks is augmenting the demand for glass and PET bottles. Thus, the demand for aluminum caps and closure is likely to be driven by the increasing usage of glass bottles. This is expected to create demand for plastic bottles in the country.
- Companies in the country are actively seeking sustainable plastic bottle packaging solutions. In February 2020, Coca-Cola beverages, South Africa, has introduced a 2L returnable bottle made of PET plastic that can be reused 14 times. With this innovation, the company is looking to provide greater value for money.
- The consumption of beverages in the country is growing at a high rate, without the influence of external economic factors. Soft drink consumption is rising in the country, owing to climatic conditions, with the population increasingly drinking carbonated drinks. The consumption of bottled water also grew significantly, with severe water scarcity in the nation for the past two years. With PET bottles being the norm in the market, the consumption of plastic bottles grew parallelly.
- The demand for household goods is also growing, with many consumers spending more on essentials. The improving socio-economic climate in the country is influencing the market positively. The recycling trend is catching up with companies and individuals focusing on recycling.
- The demand for substances in South Africa has increased, and more funds are allocated to address the demand for substances, especially in the Western Cape

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South Africa Plastic Packaging Industry Overview

The South African Plastic Packaging Market is competitive and consists of a few influential players. In terms of market share, some of these important actors currently manage the market. These influential players with a noticeable share in the market are concentrating on expanding their customer base across foreign countries. These businesses are leveraging strategic collaborative actions to improve their market percentage and enhance their profitability.

- August 2021 - SPAR announced new sustainability goals with the introduction of several green initiatives for the next four years. SPAR has also committed to having 100% of plastic packaging which is reusable, recyclable, or compostable by 2025. A few of the included initiatives are; the introduction of 100% recycled plastic bags that will allow diverting nearly 4000 tons of waste from landfills and the introduction of new non-toxic, odorless, and eco-friendly firelighters made using dung sourced from rhinoceros.
- July 2021, The Austrian plastic packaging manufacturer Alpla Group acquired South Africa-based packaging manufacturer Verigreen Packaging to allow Alpla to expand its presence in southern Africa and offer them an inroad into a market segment in which the group does not operate in the region.
- July 2020 - Coca-Cola Beverages South Africa (CCBSA) expanded the roll-out of 2L returnable PET bottles across Northern Gauteng, Limpopo, and Mpumalanga to help reduce plastic waste after a successful pilot in the eastern cape pilot project in 2019.

Additional Benefits:

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

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