

Egypt Plastic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Egypt Plastic Packaging Market size is worth USD 2.41 Billion in 2025, growing at an 3.41% CAGR and is forecast to hit USD 2.85 Billion by 2030.

Key Highlights

- Several macro factors are set to propel the plastic packaging market, such as evolving lifestyles, a growing urban population, expanding economic activities, and the rising presence of online retailers.
- Flexible plastic packaging melds the strengths of plastic, paper, and aluminum foil, offering printability, durability, barrier protection, freshness, and user-friendliness. The flexible plastic packaging industry is fueled by escalating demands in key industries like food, beverages, cosmetics, personal care, and pharmaceuticals and is anticipated to witness substantial growth over the forecast period. Factors such as the rise of modern retail, growing consumer affluence, and the surge in e-commerce activities, especially in emerging regions, are set to propel the plastic packaging market.
- The plastic packaging market in Egypt is witnessing rapid growth, driven by several factors. These include the rising adoption of oxo-degradable plastics, escalating demand from end-user industries, technological advancements enhancing barrier solutions, and the integration of more active and intelligent packaging to align with heightened consumer expectations.
- Food companies opt for flexible plastic as secondary packaging to reduce competition and bolster profit margins. In line with its strategy to expand in emerging markets, Kellogg Company made a significant move by acquiring Egypt's leading cereal company, Mass Food Group. Leveraging Mass Food Group's local manufacturing prowess, established brands, and distribution network, as well as Kellogg's international sales expertise, renowned brands, and marketing acumen, the collaboration aims to bolster the growth potential of the cereal segment in Egypt and broader North Africa. This strategic horizontal integration not only enhances market presence but also promises improved profit margins.
- The rising alarm over mounting plastic waste in landfills has spurred a push toward a circular plastics economy. While Egypt's

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plastic recycling industry is nascent, a handful of startups are seizing the chance to recycle or trade the plastic waste that would otherwise fill landfills. In a bid to bolster sustainable initiatives and tackle e-waste recycling hurdles, PLASTEX 2024 in Egypt unveiled a novel Plastics Recycling Zone. This zone offers a platform for both budding entrepreneurs and established firms to showcase and exchange their recycling techniques and technologies.

- The industry faces a potential threat to its expansion in the coming years due to heightened sustainability awareness and stringent regulations aimed at curbing plastic pollution. The Egyptian General Organization for Standardization and Quality is set to introduce specifications for single-use plastic bags, mandating a minimum thickness of 50 microns.

Egypt Plastic Packaging Market Trends

Growing Demand for Flexible and Oxo-degradable Plastics

- The increasingly urbanized and fast-paced lifestyles of consumers are fueling the demand for flexible packaging. Compared to traditional alternatives, flexible plastic packaging consumes less resources and energy and boasts a 35% space-saving advantage on retail shelves, translating to significant cost savings.

- Dynamic shifts in the industry, notably spurred by new regulations, have accelerated the innovation of unique packaging solutions. Heightened awareness around biodegradable polymers and their environmental impact is compelling manufacturers to pivot toward safer, eco-friendly alternatives, like oxo-degradable plastics. With a focus on sustainability, manufacturers are gravitating toward packaging solutions that are resource-efficient, cost-effective in transportation, and offer extended shelf lives. This strategic shift not only alleviates cost pressures but also ensures the integrity of the packaged products.

- Over the past few years, Egypt witnessed a notable shift in its distribution channels, with retailers expanding their presence. This transition has seen a shift from traditional grocery merchants and open markets toward a preference for supermarkets and hypermarkets.

- Furthermore, as food and agricultural exports surge, the government is strategically positioning itself to harness the potential benefits for the agriculture sector. Egypt's Minister of Planning and Economic Development has outlined ambitious targets, which include elevating the agriculture sector's GDP contribution to 12% by 2024, alongside a parallel goal of boosting agricultural production by 30% within the same timeframe.

- The Chemical and Fertilisers Export Council's report highlighted that in 2023, Egypt's plastic product exports hit USD 1.75 billion, accounting for 27% of its chemical and fertilizers exports. According to the International Monetary Fund, Egypt's GDP per capita is expected to rise from USD 3,727.66 in 2023 to an estimated USD 4,534.36 by 2029. This rise in GDP per capita is poised to bolster the nation's standard of living, income levels, and infrastructure, thereby propelling the demand for plastic packaging.

Food is Expected to Hold a Significant Market Share

- Plastic packaging's appeal lies in its lightweight nature and cost-effectiveness. These attributes have fueled the rising popularity of both rigid and flexible plastic packaging in the food industry, leading to a notable shift from traditional paperboard, metal, and glass alternatives. Flexible packaging, favored for its versatility, finds its primary applications in frozen foods, dairy items, snacks, and confectioneries. In contrast, the nation predominantly employs flexible packaging for meat, poultry, and fresh produce, a trend bolstered by advancements like controlled environments and high-pressure processing.

- In Egypt, frozen food products primarily flow through convenience stores and hypermarkets/supermarkets. Recent advancements in the country's frozen food market involve bolstering the cold chain infrastructure to enhance product safety and quality. This effort includes the establishment of new cold storage facilities and warehouses. These investments are a response to Egypt's growing population and the resulting strain on the food supply.

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- The Egyptian Chamber of Food Industries reports over 7,000 active food manufacturing companies in Egypt. The industry's growth is primarily fueled by the nation's expanding population, which increases by approximately 2.3% to 2.5% annually. Egyptians allocate more than 30% of their income toward food expenses.
- According to the Hindawi report, Egypt's population, which exceeded 100 million in 2021, is anticipated to climb to 123 million by 2030. The country's population growth, while nearly linear, accelerates as the base number grows. This surge in population is set to compound Egypt's existing food supply challenges, thereby heightening the demand for frozen food, prized for its extended shelf life.
- As per Egypt's Central Agency for Public Mobilization and Statistics (CAPMAS), the inflation rate for food and non-alcoholic beverages in Egypt spiked to 14.8% in February 2023, up from 4.8% in November 2022. This surge was primarily driven by escalating prices in both core food and non-food items. Notably, the food inflation rate in Egypt witnessed a sharp rise, largely attributed to the fallout from the Russia-Ukraine War, particularly impacting wheat prices.

Egypt Plastic Packaging Industry Overview

The Egyptian plastic packaging market is semi-consolidated with the presence of a few major players. Some participants benefit from the enhanced market reputation and broader regional presence. The major players with a sizable market share, such as Amcor PLC, Huhtamaki Oyj, Rotografia Group, Uflex Limited, and ALPLA Group, are concentrating on expanding their customer base throughout the end-user industries. Some of the firms collaborate and innovate new products through mergers or acquisitions.

- November 2023 - Amcor PLC, one of the global companies operating across various countries, including Egypt, announced a Memorandum of Understanding (MOU) with polyethylene producer NOVA Chemicals Corporation for purchasing mechanically recycled polyethylene resin (rPE) for use in flexible packaging films. Increasing the use of rPE in flexible packaging applications is a critical element of Amcor's responsibility to support packaging circularity.
- January 2024 - Flex P. Films, a step-down subsidiary, initiated the commercial operations of a PET consumer recycling plant in Egypt under the banner of Flex P. Films (Egypt) SAE. This new plant, with an annual capacity of 18,000 MT, focuses on post-consumer recycling (PCR). Through advanced mechanical recycling techniques, the subsidiary aims to transform post-consumer PET bottles into recycled (rPET) PET flakes and pellets. This process involves sorting, washing, drying, and grinding the PET bottles to create the necessary flakes and pellets for PET film production.

Additional Benefits:

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

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