

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

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Report description:

The MEA Pharmaceutical Packaging Market is expected to register a CAGR of 6.7% during the forecast period.

Key Highlights

- The Middle East region accounts for a meager portion of 3.5% of the overall pharmaceutical packaging market. Over the last few years, plastics have emerged as the most widely used packaging materials in the pharmaceutical market owing to incremental technological changes and growth in generic and specialty drugs in the pharmaceutical sector. The increasing need for anti-counterfeiting techniques to protect the interests of patients has further strengthened the growth of pharmaceutical packaging.
- The growth prospects of the study market are expected to be dependent on the overall growth of the pharmaceutical and healthcare sector in GCC and other neighboring regions. An overall rise in living standards, coupled with an increase in the aging population and the endeavors of several governments towards improving their healthcare sector, can be seen as major factors contributing to the growth of the pharmaceutical sector in this region. Moreover, the role of packaging materials in the pharma sector has greatly evolved over the last few decades.
- They are now expected to comply with several regulatory standards and provide product information and ensure proper drug delivery in case of self-administering drugs. The pharmaceutical packaging materials have been distinctly categorized into primary, secondary, and closure systems. Pharmaceutical companies have to be mindful of their target patient base, product stability requirements, commercial viability, and regulatory considerations while opting for plastic packaging materials.
- The major drivers for growth in this market include growing health awareness in the region, proactive measures against counterfeit products, and increased contribution of nanotechnology and biotechnology practices in the pharmaceutical sector.
- The advent of new healthcare medicines and devices to counter endemics, respiratory diseases, and other prevalent ailments is one of the major drivers for growth in the pharmaceutical plastic packaging market. Conversely, environmental concerns related

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to the use of plastics and constant changes in compliance standards are expected to impede the growth in this market.

- In the Middle East and Africa, particularly South Africa, an unprecedented number of COVID-19 cases have resulted in the suspension of the medical packaging business. The decline in other medical product production sectors had a negative impact on medical packaging demand in the first month of 2020. Moreover, the decrease in the total production of packaging materials led to the termination of the medical packaging material production project, which led to a decrease in the demand for medical packaging materials. Similar trends were observed in other countries in the Middle East and Africa, namely Saudi Arabia and the UAE. However, the country is likely to overcome the decline in demand in this way, and economic activity is expected to recover, especially in early 2021.

MEA Pharmaceutical Packaging Market Trends

Bottle Packaging segment to hold biggest operating expense

Glass and Plastic Bottles are used for various kinds of drug packaging in the region. A considerable number of pharmaceutical formulations have been packaged using glass containers, and they are usually the first choice of packaging materials.

- Bottles have been the preferred mode of packaging tablets and capsules. They are also used for packaging liquid dosages like syrups, nasal and ophthalmic medications. Plastic bottles will continue to have the highest market share among primary pharmaceutical containers, reflecting the usage in the bulk and prescription dose packaging of oral ethical drugs and the packaging of solid dose oral over-the-counter medicines in large quantities.
- There are many kinds of medicine packaging plastic materials, including PVC, PE, PP, PS, PET, nylon, etc. The PE, PP, and PET account for the largest proportion; however, the amount of PVC is reducing. The largest share within plastic bottles is for ovals, square and round containers with threaded necks designed to fit a wide variety of closures.
- However, the market is getting progressively occupied by Plastic bottles. Plastic bottles manufactured using high-density polyethylene (HDPE) and polyethylene terephthalate (PET) are being used to pack pharmaceuticals than glass. This is due to high temperature and impact resistance, the excellent barrier to gas and moisture, and transparency and opacity properties.
- Moreover, bottles are used in large quantities for oral drugs that are distributed through prescription in the region. Bulk dose volumes that are mailed to pharmacies are conveniently packed in plastic bottles.
- Hence, based on the requirement and usage, the types of bottles are made. The ease of use and high demand for plastic bottles in the pharmaceutical packaging industry will help the market grow, and it will be the highest market shareholder in the forecast period of 2021-2026.

Saudi Arabia to hold profitable market share

Saudi Arabia has emerged as one of the most lucrative markets for the pharmaceutical packaging sector. Drug imports account for more than 80% of the market, as it heavily relies on external markets for meeting the ever-growing domestic demand. Pharmaceutical packaging materials are widely used for the repackaging and export of semi-finished medicaments processed in this region. These repackaged drugs are commercially sold in neighboring countries to address the demand-supply paradigm.

- Public spending on healthcare has improved considerably over the last few years; the rise in chronic diseases, especially COVID-19 and other health ailments, has contributed to the growth of the pharmaceutical sector. The use of specialty pharma drugs is expected to witness high growth in this region.
- Saudi Arabia is widely known as a pharma manufacturing hot spot in the Middle East. The country has been estimated to

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account for more than half of the GCC pharmaceuticals market. The Saudi government has been taking several proactive measures to diversify the domestic sector, which is heavily reliant on petroleum and oil. The Saudi Arabian healthcare sector is world-renowned as one of the most sophisticated healthcare networks.

- Moreover, the development of four 'economic' cities (namely KAEC, PABMEC, KEC, and JEC) is expected to create new opportunities for the establishment of pharmaceutical processing units in this region. Pharma giants like Pfizer have taken a keen interest in expanding their operations in a bid to gain more ground in the GCC region.
- However, collaborating with local companies remains a considerable challenge for global companies, as they are required to meet their quality standards and comply with regional regulations. The Saudi Food and Drug Authority, in conjunction with other GCC member countries, is responsible for the pricing of pharmaceutical products in this region. Pharmaceutical packaging companies could be prompted to cut down on their prices by drug manufacturers in a bid to keep the overall production costs under check.
- This region is currently growing through a transition due to the fluctuations in the oil prices; however, strong economic reserves are expected to offset the impact of the reduction in oil prices in the short term. These macroeconomic changes are anticipated to have an indirect impact on the pharmaceutical packaging market. However, the overall demand shall remain fairly high over the reporting period.

MEA Pharmaceutical Packaging Industry Overview

The Middle East and Africa Pharmaceutical Packaging Market are fragmented due to the presence of key players like Indevco group, Amcor Worldwide, General Plastics, Saudi Arabia Plastic Packaging Systems Co., and Sealed Air Corporation; all these players are investing in new innovations and for R&D upscaling the industry.

- April 2021 - Amcor developed breakthrough recyclable healthcare packaging, the new AmSky blister system, the recent innovation to transform the sustainability of healthcare packaging and to eliminate PVC from blister packaging, enabling Amcor healthcare to improve its recyclability. This innovation offers child-resistant and senior-friendly solutions for pharmaceutical packaging.
- Sep 2021 - SCHOTT AG acquired the Arizona-based microarray solutions company extending the company's presence and strengthening its bioscience capabilities. This acquisition helps customers to benefit from enhanced development and manufacturing capabilities, including high-density microarray printing.
- Nov 2021 - INDEVCO partners with the Alliance to End Plastic Waste to help reduce plastic waste in the Middle East and North Africa region. INDEVCO took on the role of Co-Chair to the Alliance to End Plastic Waste (AEPW), the Middle East & North Africa (MENA) Regional Task Group. The objective of the AEPW Regional Task Group (RTG) is to translate its global strategy for eliminating plastic waste into a regional strategy that tailors to the local resources, challenges, and needs.

Additional Benefits:

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

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