

## **MEA Soft Drinks Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The MEA Soft Drinks Packaging Market is expected to register a CAGR of 4% during the forecast period.

#### **Key Highlights**

- According to a study by Tetra Pack, the GCC consumed 3,733 million liters of dairy, 2,646 million liters of juice, nectars, and still drinks, 6,909 million liters of coffee and tea, 11,310 million liters of packaged water, and 2,981 million liters of carbonated soft drinks in 2018 for a total of 27,857 million liters.
- The beverage industry plays an essential role in the region. According to the Eighth Arab Beverages Conference, the beverage industry caters to about 300 million consumers in the region, with a production volume of about 10 billion liters per year. The beverage industry continues to play a significant role in shaping the region's economy.
- The demand for health drinks is expected to increase, influenced by the campaigns led by the ministries of health in various countries in the region. Due to the ban on alcohol in many countries in the region, soft drinks, such as energy and health drinks, are considered substitutes. According to Agriculture and Agri-Food Canada, the retail sales of fortified and functional energy drinks in the United Arab Emirates are expected to account for USD 344.8 million in 2020.
- The demand for bottled water increased significantly in the region. In addition, consumers are more conscious of the need for healthier diets. The increased demand for bottled water, in turn, is expected to augment the growth of the bottled water packaging market in the MEA region.
- Moreover, there is a significant demand for PET bottles for water and other soft drinks packaging. For instance, Almarai developed its business through strategic investments. It is the largest producer and distributor of soft drinks in the Middle East. As the leader in the juice market, Almarai installed two new Sidel PET complete lines, each one handling 54,000 bottles/hr, in its Al Kharj central processing plant (CPP).
- With the recent outbreak of COVID -19, the production of many manufacturers of soft drink packaging solutions decreased (due

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to lockdown situations in the region and the disruption in the supply chain). This factor impacted the manufacturing of packaging products among various companies. For example, on March 27, 2020, the UAE government closed the fresh food market for two weeks. The other countries in the region, such as Saudi Arabia and Qatar, also implemented the same. The Asir municipality ordered safe and secure packaging for food and beverage light of the pandemic situation.

- The African region is facing a decline in GDP due to the pandemic. This is expected to impact its supply chain, as it is heavily dependent on importing raw materials and goods. This, in turn, is expected to affect the manufacturing of packaging products in the region.

## Middle East and Africa Soft Drinks Packaging Market Trends

### Saudi Arabia to hold the highest market

- Saudi Arabia is one of the most extensive soft drinks packaging industries in the Middle Eastern region. The country has a vast consumer base, adding to the rapid growth in the demand for soft drinks packaging from the country every year.
- The factors, such as high disposable income, ease of availability, improvement in living standards wide variety, increasing tourism, presence of domestic, and the presence of the international players in the market, are fueling the growth of the beverages industry in the country.
- In addition, Saudi Arabia is one of the largest consumers of plastic products in the GCC region. According to the recent estimates of the GPCA, the country has about 95 kg per capita consumption of plastics, making it the largest consumer of plastic products in the entire GCC region.
- Despite the high demand and consumption, plastic packaging also has considerable drawbacks. The local manufacturers who source polymer or other plastic raw material from the country are often exposed to uncertainty caused by fluctuating crude oil prices and security incidents, affecting the cost of polymers and resins.
- Currently, Saudi Arabia recycles about 10% of its PET (polyethylene terephthalate) bottles. The recycling rate is expected to increase, with the increasing focus of the government on recycling. This, in turn, is expected to drive the demand for PET in the country.
- Companies are increasingly focusing on the urgency of recycling PET into food-grade products, such as beverage containers. For instance, The Coca-Cola Company intends to use 50% recycled PET in its containers by 2030.
- The Saudi Arabian-based SABIC developed new Flowpack PP impact copolymers to assist in manufacturing injection-molded rigid packaging. Flowpack PP was designed to produce rigid packaging, with volumes ranging between 200 ml and around 10 L. It can be used to manufacture closures and caps used for packaging soft drinks. The new Flowpack PP offers rigid packaging with enhanced stacking capabilities and makes transport and storage more economical.
- Stringent regulations for the use of plastic are imposed in the country. This is forcing the manufacturers to opt for new packaging alternatives, such as oxo-degradable plastics. According to the Larbi El-Attari of the Swiss Business Hub Middle East in Saudi Arabia, these regulations are equally applicable to the plastic produced in Saudi Arabia or imported to the country. As a result of this development, non-compliant products can no longer be brought through import channels.

### Glass Jars in Egypt are expected to Register a Significant Growth

- Glass Jar is among the most preferred packaging material for soft drinks as it preserves for the long term and avoids contamination. The ability of glass jars to preserve the aroma and flavor of the drink is driving the demand.
- Therefore, most restaurants use mason glass jars to serve as they are attractive, easy to wash, and reusable. The rise in environmental awareness among customers is also forcing manufactures to reconsider their packaging.

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- Many vendors in the market are modernizing their manufacturing plants by switching to advanced tools and production infrastructure to meet the needs of their quality-conscious customers.
- For instance, Arab Pharmaceutical Glass Co. has upgraded its manufacturing plants by switching to electronically controlled glass melting furnaces, six automated production lines, electronically controlled state-of-the-art forming machines, and inspection machines. It offers glass jars to pharmaceutical companies such as Gsk, Aventis Pharma, MEPACO, Novartis Pharmaceuticals, etc.

## Middle East and Africa Soft Drinks Packaging Industry Overview

The Middle East and Africa packaging market have a comprehensive portfolio of suppliers from the local and international markets. This factor leads to high competition among the vendors. In many cases, due to the absence of multiple distribution channels, the vendors directly interact with the end-users to sell their products. This scenario leads to long-term deals with end-users. Hence, the vendors often choose to retain their clients or make new clients by competitive pricing strategies.

Additionally, as most of the packaging material is sourced from imports, there is high competition among the suppliers to capture a limited number of players in the market. This factor intensifies the competitive rivalry among the local and foreign manufacturers. Some of the recent developments are:

- Jul 2020 - Huhtamaki launched a range of high-quality affordable and reusable face masks today. The Huhta Masks are suitable for everyday use and help reduce the spread of droplets into the environment. The comfortable masks are designed to be breathable and washable and are made of high-quality fabric with anti-microbial and fluid repellent properties.
- June 2020 - Tetra Pak launched a new, first-of-its-kind low-energy processing line for juice, nectar, and still drinks (JNSD) to take beverage processing to a new efficiency level. It uses a combination of Pasteurization, Filtration, and UV Light technology to treat beverages in two separate streams, aseptically blended into the final beverage.

## Additional Benefits:

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

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