

Middle East And Africa Paper And Paperboard - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Middle East And Africa Paper And Paperboard Market size is worth USD 15.67 Billion in 2025, growing at an 3.36% CAGR and is forecast to hit USD 18.48 Billion by 2030.

Driven by the growth of industries like food and beverages, personal care, healthcare, and e-commerce, the MEA paper and paperboard packaging market is poised for steady expansion. Additionally, the region's commitment to sustainability is boosting the adoption of recyclable paper and paperboard products.

Key Highlights

- Pulp, derived from wood and non-wood materials, is the foundation for producing paper and paperboard packaging. A significant source of wood pulp comes from recycled paper. Given its sustainability and affordability, wood pulp has become the go-to choice for various end-use industries in paper and paperboard packaging.
- In the Middle East, the market for sustainable packaging products is on the rise, primarily due to heightened awareness about reducing the carbon footprint of conventional packaging materials. In alignment with its National Vision 2030, the Qatari government has initiated multiple green economy programs to curtail reliance on non-renewable resources and minimize waste output.
- Similar to trends in the food and beverage sector, a surge in health-conscious consumers opting for grocery delivery and meal kits has led to a notable uptick in take-out preferences among food suppliers. Furthermore, global fast-food giants like McDonald's are seizing the momentum of eco-friendly food packaging, propelling market growth. Retail-ready packaging offers significant cost savings, with estimates suggesting a potential 50% reduction in shelf restocking and handling costs. This advantage has influenced food delivery services and heightened their focus on environmentally friendly, paper-based packaging.
- Moreover, rapid urbanization and a boom in tourism, with visitors prioritizing safer processed foods, have spurred the demand

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for packaged food and beverages. According to the General Authority for Statistics in Saudi Arabia, the food and beverage sector's revenue is projected to rise from USD 14.46 billion in 2020 to an estimated USD 16.03 billion by 2025. This upward trajectory is set to boost the demand for sustainable packaging solutions, like folding cartons and boxes, in the food and beverage domain.

- Furthermore, the e-commerce boom and technological advancements will likely spur growth in transport and industrial packaging. Given the market's promising outlook, domestic and international investors in the paper-based sector are keen on bolstering their presence and enhancing regional product capacity. The uptick in online shopping demand further underscores the rising interest in pulp and paper products.

- However, the burgeoning demand for paper packaging faces a daunting challenge: irresponsible deforestation. This not only threatens the paperboard packaging industry's raw material supply but also poses risks to vital ecosystems. Unsustainable practices in paper production can lead to ecosystem degradation and even social conflicts, especially in regions where such practices are still rampant.

Middle East And Africa Paper And Paperboard Market Trends

Demand For Corrugated Boxes Backed By E-commerce Growth

- As sustainability becomes a pivotal concern across the supply chain, corrugated packaging is gaining traction. The pulp and paper industry's advancements in producing modern containerboards from raw materials enhance its recyclability. Moreover, there's a growing preference for corrugated protective formats over polymer-based alternatives like foams.

- The rise of e-commerce has reshaped the retail landscape. This trend, which has altered consumer behavior and retail business models, is now expanding in the Middle East, presenting substantial opportunities for industry stakeholders. Key drivers fueling e-commerce growth in the Middle East include high per capita income, robust transportation and logistics networks, rising internet penetration, and technological advancements.

- Regulatory and governmental bodies nationwide are increasingly prioritizing sustainable packaging solutions, such as corrugated boxes, for their environmental benefits and financial advantages. This emphasis is further propelling market expansion. For example, in July 2023, Apex Business Trading inaugurated a new branch of its Corrugated Boxes Factory at the Facility Building in Samail Industrial City, Oman, and simultaneously launched four innovative products.

- According to the International Trade Administration, Africa is projected to have over 500 million e-commerce users by 2025. The grocery sector witnessed a 54% surge, primarily driven by the pandemic and subsequent lockdowns. Similar growth trends were evident across various food delivery platforms, encompassing both the grocery and fast food sectors. Consumers displayed price sensitivity, often capitalizing on online promotions and coupons.

- Saudi Arabia is ambitiously positioning itself as a key player in the global e-commerce landscape, aiming to establish a significant national, regional, and international presence. Cross Border Magazine, a prominent international digital commerce news outlet, projects Saudi Arabia's online revenue growth to maintain a robust annual rate of 13.5% through 2027. E-commerce sales in the kingdom are anticipated to soar to USD 30 billion by 2027, further escalating to USD 44 billion by 2030. This surge in e-commerce engagement is expected to drive demand for lightweight, air-free corrugated boxes and secondary and tertiary packaging solutions.

United Arab Emirates is Expected Witness the Fastest Market Growth

- As end-user industries expand significantly in the food and non-food sectors in the United Arab Emirates, the demand for containerboard, folding cartons, and corrugated boxes will rise during the forecast period. Changing food habits, driven by a growing adult population, are evident across the studied regions. This shift has intensified the food sector's demand for packaged

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foods, fresh vegetables, and fruits.

- The paper and paperboard packaging market in the United Arab Emirates is witnessing accelerated growth. This surge can be attributed to heightened environmental awareness among the populace, a rising demand for sustainable packaging solutions, and the need for appropriate packaging. Contributing factors include the burgeoning e-commerce market and an uptick in demand for electronic goods, household items, and personal care products, all spurred by economic growth and increasing per capita incomes.
- In light of the ban on single-use plastics, industry players are pivoting towards recyclable and reusable packaging solutions. The growing appetite for biodegradable packaging papers and boards further fuels this market expansion. A notable example is Khalifa Economic Zones Abu Dhabi (KEZAD Group), which recently announced the establishment of a new plant dedicated to producing recycled Kraft Paper Jumbo reels. This move diversifies the company's product offerings and aligns with the surging demand for biodegradable packaging materials in the United Arab Emirates.
- Ready-to-eat meal products prominently utilize cartons as their secondary packaging. Data from the USDA's Foreign Agricultural Service highlights the robust food and beverage landscape in the United Arab Emirates; as of April 2024, the country boasted 568 manufacturers and processors in this sector, predominantly small to medium-sized enterprises, and over 2,000 manufacturing companies. Notably, the United Arab Emirates's food processing sector caters to domestic needs and regional and global markets.
- Also, the growth in online food delivery services and takeaways would bolster the country's demand for paper packaging products. Food retail is the fourth largest e-commerce segment in the United Arab Emirates. Food e-commerce refers to items sold online from retailers or restaurants, whether groceries, packaged food, or ready-to-eat meals. According to the USDA Foreign Agricultural Service, the retail value of food e-commerce in the United Arab Emirates increased from USD 641 million to USD 1072 million in 2023. This growth is expected to be witnessed in the upcoming period with the rise in demand for products like folding cartons and boxes for packaging food.

Middle East And Africa Paper And Paperboard Industry Overview

The Middle East and African paper and paperboard market is fragmented. It consists of several major players, including International Packaging Company LLC, Arabian Packaging Co, United Carton Industries Company, Hotpack Packaging Industries, and others. Vendors with a focus on sustainability are enhancing the product line, leveraging strategic collaborative initiatives and acquisitions as a competitive advantage to expand their customer base further and gain market share.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Value Chain Analysis

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4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Threat of New Entrants

4.3.2 Bargaining Power of Buyers

4.3.3 Bargaining Power of Suppliers

4.3.4 Threat of Substitute Products

4.3.5 Intensity of Competitive Rivalry

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Growing Demand for Lightweight and Sustainable Materials

5.1.2 Increasing Growth of E-commerce Creates Demand for Various Paper and Paperboard Packaging Types

5.2 Market Restraint

5.2.1 Increasing Costs of Raw Materials

6 MARKET SEGMENTATION

6.1 By Product Type

6.1.1 Folding Cartons

6.1.2 Corrugated Boxes

6.1.3 Other Product Types

6.2 By End-user Industry

6.2.1 Food

6.2.2 Beverage

6.2.3 Healthcare

6.2.4 Personal Care

6.2.5 Electrical

6.2.6 Other End-user Industries

6.3 By Country***

6.3.1 United Arab Emirates

6.3.2 Saudi Arabia

6.3.3 Egypt

6.3.4 Morocco

6.3.5 South Africa

6.3.6 Nigeria

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 International Packaging Company LLC

7.1.2 Arabian Packaging Co. LLC

7.1.3 United Carton Industries Company (UCIC)

7.1.4 Tarboosh Packaging Co. LLC

7.1.5 Hotpack Packaging Industries LLC

7.1.6 International Paper

7.1.7 Al Rumanah Packaging

7.1.8 Green Packaging Boxes Ind LLC

7.1.9 Matco Packaging LLC

7.1.10 Global Carton Boxes Manufacturing LLC

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