

Packaging Industry In South Africa - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Packaging Industry In South Africa Market size is worth USD 11.31 Billion in 2025, growing at an 4.52% CAGR and is forecast to hit USD 14.11 Billion by 2030.

Key Highlights

- South Africa's market is witnessing momentum from a surge in young consumers, heightened consumer goods demand, and an expanding economy. The upswing in household disposable income, Statistics South Africa reported that in November 2023, the average monthly salary for South Africans in the formal non-agricultural sector exceeded 26,800 South African rands (about 1,500 U.S. dollars), marking a two percent annual increase. Over the reviewed period, earnings rose from 26,298 South African rands (around 1,410 U.S. dollars) in November 2022, showcasing a consistent positive growth trend.?
- As urbanization and mobility surge in the country, the shift toward smaller and multipack offerings gains prominence. This trend offers manufacturers a chance to sway consumer brand loyalties and entice traders. The appeal lies in these products' space-saving nature and their knack for driving sales through eye-catching packaging.
- Urbanization's rapid pace and heightened health awareness have fueled a surge in the consumption of food, beverages (both alcoholic and non-alcoholic), and other products. This, in turn, has spurred a need for diverse packaging solutions, leading to notable shifts in the preference for glass containers and bottles. Data from Statistics South Africa reveals that the Consumer Price Index (CPI) for food and non-alcoholic beverages in South Africa stands at 111.1 points as of October 2023, marking a 5.2-point increase from the preceding year.
- However, the market's growth is hindered by rising environmental concerns and a growing emphasis on recycling. Consequently, there is a rising demand for sustainable packaging solutions, especially as raw material prices for alternative packaging solutions continue to climb. This trend is pushing companies to innovate and develop eco-friendly packaging options to meet consumer expectations and regulatory requirements. The shift toward sustainability is influencing market dynamics, compelling businesses

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to adapt their strategies to remain competitive.

South Africa Packaging Market Trends

Growing Urbanization in the Country

- South Africa's rising economic expansion and rapid urbanization have bolstered its access to processed and fast food. With a significant portion of the population comprising busy, working-class professionals, the nation notably prefers ready-to-eat meals. This trend is expected to drive the demand for bags and pouches-based packaging solutions during the forecasted period.
- Leading global beauty and cosmetics firms are strategically leveraging the anticipated growth in Sub-Saharan Africa, often hailed as the industry's "next frontier." The region's population is set to double to 2.4 billion by 2050, bolstered by a burgeoning middle-income population and rapid urbanization. Projections indicate the beauty market here is poised to double in size over the coming decade.
- Urban consumers are embracing evolving trends and consumption patterns. In Sub-Saharan Africa, the demographic of 12 to 24-year-olds has been consistently growing, now representing a significant portion of the population, as reported by the World Bank. Given that this youthful demographic typically shows a higher propensity for spending on both alcoholic and non-alcoholic beverages, as well as on-the-go food, the demand for packaging is poised to escalate.
- As families shrink and urban living rises, homes are downsizing, leading to a demand for space-efficient packaging. Carton packaging emerges as the ideal solution, optimizing both storage and logistical efficiency.

Food and Beverage Industry to Add Significant Growth to the Market

- The South African government is prioritizing the food and beverage sector, recognizing its pivotal role within the country's manufacturing landscape. It is actively promoting the growth of both agriculture and the agro-processing industry.
- Technological advancements have spurred the creation of tailored, eco-friendly, flexible packaging solutions, leading to a remarkable upsurge in the packaging sector. A significant share of the packaging industry in Africa caters to imported food and consumer goods. This growth is primarily fueled by an increasing appetite for packaged foods, a drive to maintain competitive pricing, and substantial investments in food processing.
- In South Africa, the bakery sector is witnessing a surge in demand for cost-effective, ready-to-eat products, propelling the industry forward. Government support further bolsters this growth, particularly toward micro, home-based, cooperative bakeries and confectioneries. Despite facing challenges like Corporate Sustainability Programs, HSE legislative changes, and ensuring consistent electrical power supply, South Africa's process industry remains on a growth trajectory. Clients in the region are displaying resilience, actively strategizing to navigate these challenges and sustain growth.
- Younger consumers are increasingly favoring energy drinks. Notably, the rising preference for low and non-alcoholic beers alongside craft brews is a significant trend in the beer market. This shift is underscored by a broader industry move toward premiumization, emphasizing quality over quantity. Moreover, the government's removal of all alcohol sales restrictions is poised to boost alcohol sales, directly benefiting the glass packaging sector.
- Consumer preferences are shifting toward healthier and more natural options, fueling the rise of organic, plant-based, and functional beverages. South Africa also has a rising appetite for premium alcoholic beverages, a trend expected to persist in the coming years. Notably, local breweries are incorporating fruit hops in their craft beers, a move that resonates well with consumers, helping these companies carve out a premium niche and driving market expansion.

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South Africa Packaging Industry Overview

The South African packaging market is fragmented, with many players representing a considerable market share. These major players with a prominent market share focus on expanding their customer base worldwide and leveraging strategic initiatives to increase their market share and profitability.

- July 2024: Agile Capital acquired the shares in Berry Global Group Inc.'s Consumer Packaging International (CPI) division in South Africa, previously owned by WDB Investment Holdings.
- March 2024: Coleus Packaging, a prominent metal crown manufacturer, is gearing up to boost its production. The company aims to produce 7 to 8 billion metal crown closures. These closures are destined for bottling companies, breweries, and beverage industry players in South Africa and across the broader African continent. This strategic expansion follows Coleus Packaging's hefty investment of ZAR 40 million (USD 2.11 million) in the cutting-edge PMC500 metal crown manufacturing machine.

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 Definitions
- 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
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Threat of New Entrants
 - 4.3.2 Bargaining Power of Buyers/Consumers
 - 4.3.3 Bargaining Power of Suppliers
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Assessment of Macroeconomic Factors on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Growing Demand from Food and Beverage Industry
 - 5.1.2 Rising Demand for Packaging from Retail Sector
- 5.2 Market Challenge
 - 5.2.1 The Rising Environmental Concerns

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6 MARKET SEGMENTATION

6.1 By Packaging Material

6.1.1 Plastic

6.1.2 Paper and Paperboard

6.1.3 Metal

6.1.4 Glass

6.2 By Product Type

6.2.1 Bottles

6.2.2 Bags and Pouches

6.2.3 Corrugated Boxes

6.2.4 Metal Cans

6.2.5 Other Product Types

6.3 By End-user Industry

6.3.1 Food and Beverage

6.3.2 Household and Personal Care

6.3.3 Pharmaceuticals and Healthcare

6.3.4 Other End-user Industries

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Constantia Afripack Sacks (Constantia Flexibles)

7.1.2 Berry Astrapak

7.1.3 WestRock

7.1.4 Huhtamaki Springs South Africa

7.1.5 Mondi Merebank (Mondi PLC)

7.1.6 Sonoco Products Company

7.1.7 Tetra Laval Group

7.1.8 Win-Pak

7.1.9 Detpak

7.1.10 Dalgen Packaging CC

7.1.11 ACS Promotions (Pty) Ltd

7.1.12 Clear Crafts

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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