

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

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Report description:

The Saudi Arabia Rigid Plastic Packaging Market size in terms of production volume is expected to grow from 1.00 million metric tons in 2025 to 1.27 million metric tons by 2030, at a CAGR of 5.01% during the forecast period (2025-2030).

Key Highlights

- Major drivers for the market include the rising use of oxo-degradable plastics, heightened demand for rigid plastic packaging across various industries, technological advancements yielding better barrier solutions, and the introduction of active and intelligent packaging in response to consumer demand. In the Middle East, Saudi Arabia is a dominant player in the rigid plastic packaging market. The nation's expansive consumer base and diverse industrial activities (barring oil and gas) drive the surging demand for plastic packaging.
- New plastic regulations are set to impact a range of products, including plastic cases, containers, and packaging. Under the new directives from the Saudi Arabian organization SASO, all plastic products must utilize approved oxo-biodegradable materials. This mandate is poised to spur investments in innovation, paving the way over the next two years for novel rigid packaging solutions tailored to meet specific regulatory and end-user demands.
- In response to the escalating demand for rigid packaging, market vendors are fortifying their positions by launching new divisions. For instance, SABIC inaugurated a Caps and Closures division in Riyadh, Saudi Arabia. This division not only addresses challenges in the circular economy but also emphasizes eco-friendly materials and solutions. SABIC has cemented its stature in the Caps and Closures domain, broadening its reach across food, beverage, and non-food industries.
- In March 2023, Saudi Investment Recycling Company (SIRC), a subsidiary of KSA's sovereign wealth fund, the Public Investment Fund, secured a 60% stake in Masab Plastic Factory Company. Masab, renowned for exporting PET flakes, serves fiber and bottle manufacturers in regions like Australia, India, Thailand, Turkey, and the United Kingdom. These PET flakes, derived from crushed plastic waste, undergo heating and molding into various shapes, predominantly plastic bottles.

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Saudi Arabia Rigid Plastic Packaging Market Trends

Increasing Demand Across End-use Industry Segments to Drive the Market

- Demand for rigid plastic packaging solutions is surging, primarily fueled by end-use industries such as food, retail, consumer goods, cosmetics, and pharmaceuticals. This increase is largely linked to rapid urbanization, which often leads to heightened consumer spending, a surge in the production of consumer goods, a notable expatriate population, and shifting dietary preferences.
- As organized retail formats like hypermarkets, supermarkets, and e-commerce gain traction, the country's processed and packaged food market is witnessing significant growth.
- In a bid to diversify from its oil and gas dependence, the government is bolstering real estate projects and liberalizing the retail market. Such moves are anticipated to unlock new opportunities for rigid plastic packaging, driving demand across multiple industries.
- In the third week of May 2024, point-of-sale (POS) transactions in Saudi Arabia hit SAR 11.65 billion (USD 3.1 billion). The foodservice industry is also bolstering the Saudi Arabian rigid plastic packaging market. As reported by Redseer in December 2023, the Saudi Arabian foodservices market achieved a milestone of USD 31 billion in 2023, marking a notable 35% Y-o-Y growth. Quick-service restaurants are increasingly reliant on rigid plastic trays and foodservice boxes.
- Innovations in healthcare, pharmaceuticals, and cosmetics are set to sustain the rising demand for plastic packaging. The growing appetite for skincare and healthcare products, especially those with plastic packaging, is a primary market driver.

Polyethylene Terephthalate (PET) Holds a Major Market Share

- Polyethylene terephthalate (PET), an aliphatic polyester, is semi-crystalline in its stable form, widely utilized in everyday items, and boasts easy recyclability. Predominantly, it is employed in food and beverage packaging, among other uses. PET exhibits resistance to impacts, moisture, and solvents. Originating from polyethylene (PE), PET is part of the polyester family, catering to applications requiring lightweight, rigid, and flexible packaging.
- Due to its robust barrier properties and adaptability, PET stands out as a favored plastic for thermoforming. Before cooling, PET can be molded into diverse shapes, enhancing shelf life. This molding capability, combined with its resistance to tampering and external factors, renders PET ideal for sensitive uses, including food containers, beverage bottles, and medical device packaging.
- In the Saudi Arabian soft drinks market, consumer purchasing decisions are heavily swayed by convenience. The market's growth is propelled by ready-to-drink (RTD) formats, on-the-go packaging, and widespread availability through retail channels like supermarkets, convenience stores, and online platforms.
- In May 2024, Arab News highlighted a significant evolution in beverage choices within Saudi Arabia. Premium local beverages are being increasingly preferred over conventional sodas. This trend has ignited a renaissance in the Saudi Arabian beverages industry, emphasizing innovation and quality. Al-Jameel International, a Saudi Arabian enterprise, astutely tapped into this shift, launching 'Kinza,' a carbonated drink, which quickly resonated with the local audience back in 2022.
- The Saudi Arabian beauty market, especially luxury and fashion products, is rapidly ascending, marking it as one of the GCC's swiftest-growing market segments. This surge is attributed to rising disposable incomes and increased consumer expenditure. The industry is also undergoing a digital metamorphosis, with e-commerce and social media amplifying the reach of beauty products. A notable trend is the growing preference for halal beauty products, reflecting the heightened societal engagement of Muslim women. Recognizing this global fascination with beauty, both businesses and consumers have responded, leading to a pronounced demand for rigid plastic packaging, including jars, containers, and cosmetic bottles.

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- As per GPCA, the GCC's chemical production saw a 1.9% uptick, reaching 159 million tons from 2022 to 2023. This growth can be largely attributed to the expansion of polyethylene and polypropylene plants across the Gulf. With increased availability from these raw material plants, the market for PET bottles in Saudi Arabia is poised for growth.
- Insights from the Saudi Food Show underscore the promising future of the Saudi Arabian food and beverage industry. Projected to grow at an annual rate of 3.44%, the industry is set to reach USD 27.83 billion by 2029. This trajectory solidifies Saudi Arabia's position as a central hub for food and beverages, drawing both domestic and international stakeholders. The rising demand, particularly for rigid plastic bottles like PET, opens up numerous opportunities.

Saudi Arabia Rigid Plastic Packaging Industry Overview

The rigid plastic packaging industry is highly fragmented in Saudi Arabia, with the presence of market incumbents such as Obeikan Investment Group, Zamil Plastic Industries Co., Arabian Plastic Industrial Company Limited, Takween Advanced Industries, and 3P Gulf Group accompanied by several regional Saudi Arabian contract packaging firms. Although the barriers to entry for new players are high, regional packaging companies are witnessing value in foraying, especially in the rigid packaging industry, owing to significant demand from industrial, food, beverage, and other end-user segments.

- August 2023: Future Plus, located in Riyadh, Saudi Arabia, is the sister company of Future Plast Industries LLC, a processor based in Abu Dhabi, United Arab Emirates. Future Plast specializes in producing single-piece and two-piece closures, including the 1881 neck finish for carbonated soft drinks (CSDs). Additionally, it manufactures standard 30/25 high neck and 29/25 short neck closures for still water applications. This is achieved using six Sacmi compression molding machines. Given this background, the decision to introduce closures to the portfolio in Saudi Arabia, utilizing the newly acquired system, could be just the initial step. Recently, the Saudi Machine Park welcomed an Engel E-Motion 380 injection molding machine specifically for closures. This machine, ordered in 2023, has since commenced production. It boasts a 72-cavity mold from the Austrian manufacturer Z-Moulds, achieving an impressive cycle time of just 2.8 seconds.
- July 2023: MenaBev, a key bottling operator in MENA and a franchisee of PepsiCo in Saudi Arabia, partnered with Sidel, a division of the multinational Tetra Laval, to introduce seven new bottle formats across two PET lines. Sidel collaborated closely with MenaBev, based in Jeddah, to swiftly convert the two Combi PET lines at MenaBev's expansive 300,000 sq. m MEGA Plant. This transformation, completed in just a week, not only enhanced line performance but also introduced a lighter design for the renowned Aquafina brand, emphasizing efficiency and sustainability.

Additional Benefits:

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

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