

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

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Report description:

The South Africa Plastic Packaging Market size is worth USD 2.66 Billion in 2025, growing at an 2.89% CAGR and is forecast to hit USD 3.07 Billion by 2030.

The plastic packaging industry in South Africa has grown owing to its distinct advantages, including stiffness, high impact strength, and high barrier qualities.

In South Africa, plastic manufacturing contributes approximately 1.9% of the country's GDP, constitutes around 16.6% of the manufacturing sector, and has been defined as a crucial industry by the government.

South Africa has witnessed high levels of urbanization over the last few years. As per a recent study, around 64% of South Africans live in urban areas, which is expected to increase to 71% by 2030. Urbanization is picking up, and metros, such as the growing cities of Johannesburg, Durban, and Cape Town, are attracting the younger generation of consumers who are changing their consumption habits and are increasingly buying processed and packaged foods. This also creates demand for ready or on-the-go meals, directly driving the demand for plastic packaging.

Plastic packaging, lauded for its durability and ability to prolong product shelf life, is gaining traction in various industries, such as personal and home care. Aseptic packaging enables the food and beverage industry to forgo preservatives, allowing products to stay fresh longer. E-commerce businesses, emphasizing extended shelf life, are increasingly turning to advanced packaging technologies, a trend that will persist in the coming years.

According to the US Department of Agriculture, in July 2023, five significant players dominated the South African retail food

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market. They are Shoprite Holdings Ltd, Pick n Pay Retailers Pty Ltd, Spar Group Ltd, Massmart (a subsidiary of Walmart), and Woolworths Holdings Ltd. Together, they command an impressive 80% share of the market, leaving the remaining 20% mainly to the informal retail industry. Critical trends in South Africa's retail foods industry for 2024 underscore a sustained surge in e-commerce and home delivery services. Such trends would push the demand for plastic packaging in the country.

Plastic packaging is facing hurdles in market growth, such as mounting environmental concerns and a push for recycling. Consequently, the need for sustainable packaging is rising, especially as raw materials for alternative packaging solutions become pricier. Moreover, manufacturers of plastics and plastic products grapple with escalating input costs, such as fossil fuels for plastic production and primary plastics for the end products.

South Africa Plastic Packaging Market Trends

Polyethylene to Witness Growth in the Industry

- Polyethylene is a common type of consumer plastic used in many everyday products. It is a thermoplastic product that can be repeatedly melted into a liquid and cooled back into a solid. Different processing conditions produce different grades of polyethylene, which can be used for various purposes. Polyethylene is generally classified as one of several significant compounds, including LDPE and HDPE.
- Polyethylene is leakproof and impermeable to water vapor and can be heat-sealed. It can be wrapped around the product and fixed with an airtight seal. In addition to protection, it is highly adaptable, offering excellent advertising opportunities to match the product. The material provides a variety of thicknesses and transparencies, as well as a range of designer colors for more customized options.
- According to the Department of Trade, Industry, and Competition of South Africa, while a significant portion of South Africa's domestic consumption relies on locally sourced ethylene, the production levels of PE-LD, PE-LLD, and PE-HD fall short of meeting the nation's needs.
- Despite this, South Africa still finds itself importing polyolefin polymers, mainly grades not produced domestically, to address seasonal shortages and diversify its supplier base. Additionally, the nation imports substantial quantities of both finished and semi-finished plastic products, including those crafted from polymers it exports.
- Furthermore, according to Statistics of South Africa, the revenue from the wholesale trade of food, beverage, and tobacco in 2020 was USD 27.6 billion and reached USD 30.19 billion in 2023. The rise in the wholesale trade of food and beverages in the country would further fuel its plastic packaging industry.

Food Industry in the Country is Anticipated to Witness Growth

- The expanding food industry in the country is driving the growth of the market studied. Mounting consumption of processed and ready-to-eat meals, a surging focus on innovation in the food industry, and soaring demand for processed and packaged food are driving factors. Flexible packaging is one of the widely used plastic types. The rising demand for packaging foods in portable and convenient formats has driven the usage of flexible packaging across industries.?
- The South African plastic packaging industry, primarily driven by the food segment, is witnessing robust growth. Consumers increasingly prioritize attributes like cost-effectiveness, sustainability, lightweight design, reusability, recyclability, convenience, and heat resistance in their packaging choices. This rise in demand, especially for portable and convenient food formats, is fueling the adoption of plastic packaging in the food industry and across diverse industries.
- The country is poised to witness a surge in demand for fresh food packaging in the upcoming years. This uptick is primarily fueled by escalating household expenditures, which, in turn, are bolstering the appetite for convenient food products.?

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- According to the Statistics of South Africa, the revenue from processing and preserving fruit and vegetables in 2020 was USD 2.41 billion, which reached USD 2.78 billion in 2023. The rise in the revenue from processing and preserving fruits and vegetables is expected to drive the market demand for plastic packaging in the country.
- Key players in the South African plastic packaging industry include Huhtamaki, specializing in sustainable packaging solutions. Its product range spans beverages, catering, retail, and, notably, fresh foods. The company's molded fiber designs for egg and fruit packaging underscore the brand's commitment to robust, sustainable, and secure packaging solutions, amplifying the appeal of fresh food offerings by the business.?

South Africa Plastic Packaging Industry Overview

The South African plastic packaging industry is fragmented and consists of a few influential players, such as Amcor PLC, Constantia Flexibles, Mpact Ltd, Tetra Pak International SA, and ALPLA Group. In terms of market share, some of these important players currently manage the market. These influential players with a noticeable share in the market are concentrating on expanding their customer base across foreign countries. These businesses are leveraging strategic collaborative actions to improve their market percentage and enhance their profitability.

- January 2024 - Tetra Pak South Africa officially joined the South African organization at an event held at Monte Casino. This partnership signifies a pivotal step in the company's dedication to bolstering the South African economy and serving its clientele. The event was attended by Mr. Martin Jornrud, the 1st Secretary of Trade and Economic Affairs at the Swedish Embassy, along with representatives from key South African government bodies, including the Department of Trade and Industry (DTIC), the Department of Environmental Affairs (DFFE), and the KwaZulu Natal Department of Trade and Industry.

Additional Benefits:

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

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