

## **Middle East and Africa High Density Polyethylene (HDPE) Market Outlook - Forecast Trends, Market Size, Share and Growth Analysis Report (2025-2034)**

Market Report | 2025-06-28 | 151 pages | EMR Inc.

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### **Report description:**

Middle East and Africa high density polyethylene (HDPE) market size reached around 4.69 Million Tons in 2024. The market is projected to grow at a CAGR of 2.80% between 2025 and 2034 to reach nearly 6.18 Million Tons by 2034.

#### Middle East and Africa High Density Polyethylene (HDPE) Market Growth

Increasing export of food and beverage products is a key driver for the growth of the Middle East and Africa high density polyethylene (HDPE) market due to the growing need for durable, non-toxic, and cost-effective packaging materials. HDPE packaging is widely used for bottles, containers, and wrapping films as they possess high strength, are lightweight and flexible, and have effective barrier property against moisture and contamination. According to the World Bank, Saudi Arabia and UAE lead the food export market in the MEA region accounting for 5% and 3% of the global share in 2022. As the demand for food grows across the world, these exports are further expected to expand, creating an overall high density polyethylene (HDPE) demand growth for manufacturing packaging materials.

Another significant factor for the HDPE market growth is the use of HDPE pipes in district seawater cooling systems due to their high resistance against corrosion, durability, and ability to handle high pressures and extreme temperatures. With growing investments in such systems, industry leaders are gaining new market opportunities for increasing the supply of HDPE pipes, thereby resulting in the growth of Middle East and Africa high density polyethylene (HDPE) industry revenue.

#### Key Trends and Recent Developments

Growing construction industry, adoption of recycled HDPE, and technology-driven production is increasing the Middle East and Africa high density polyethylene (HDPE) market value.

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February 2024

Head of the State of Qatar, Sheikh Tamim bin Hamad Al Thani officially inaugurated the Ras Laffan Petrochemical Complex, one of the world's largest petrochemical production facilities, with an estimated capacity of 14 million tonnes per annum by the end of 2026. The facility also included two polyethylene production units which increased the country's annual output of HDPE polymer products to 1.7 million tonnes.

January 2024

The Southern African Plastic Pipe Manufacturers Association (SAPPMA) announced the launch of Project "Superior Quality 2024" (SQ24) to ensure that all product quality standards were upheld in the HDPE plastic pipes manufactured by the organisation. These include the non-inclusion of third-party recycled material, prevention of price-cutting measures, and adequate official certification. This will significantly support the Middle East and Africa high density polyethylene (HDPE) market.

June 2023

Maire Technimont S.p.A announced that its subsidiaries Technimont and Technimont Arabia Limited were awarded two EPC contracts related to a petrochemical expansion at the SATORP Refinery in Jubail, Kingdom of Saudi Arabia. The overall value of the contracts was around USD 2 billion and one of them included the execution of the high-density polyethylene (HDPE) and Logistic Area package under which two polyethylene units and the relevant product logistic facilities were required to be built.

January 2023

KPS, an industrial pioneer in the Middle East and Africa, launched the world's first 6-inches wide conductive high-density polyethylene (HDPE) double wall piping system. This new system consisted of a 160 mm primary pipe and a 200mm secondary pipe offering an extra layer of protection and was suitable for transferring sensitive liquids such as petrol, diesel, biodiesel, ethanol blends, AdBlue, Jet-A1, alcohols, acids and other chemical products.

Growing automotive & automotive aftermarket is increasing the Middle East and Africa high density polyethylene (HDPE) market revenue

HDPE is widely used in the automotive industry to produce fuel tanks, bumpers, and internal components owing to several features such as lightweight, impact resistance, and durability. Besides, its role in the automotive aftermarket is also growing due to the rising need for repairing and replacing damaged auto parts as well as manufacturing fuel containers with better and more sustainable plastic materials, thus supporting the Middle East and Africa high density polyethylene (HDPE) market. Encouraged by the trend, the Saudi Arabia Basic Industries Corporation (SABIC) devised a new high-density polyethylene (HDPE) material with 30% mechanically recycled post-consumer plastic content, custom-developed for blow moulding motor oil and lubricant bottles.

Increasing construction activities fuelling the high density polyethylene (HDPE) demand

Saudi Arabia's booming construction sector is driving the overall high density polyethylene (HDPE) demand across the region. HDPE is extensively used for manufacturing crucial building components such as plastic lumber, geocells, and piping systems for water and gas owing to its corrosion-resistant quality. According to the International Trade Administration, Saudi Arabia's construction market size in 2024 was estimated at USD 70.33 billion and was projected to reach USD 91.36 billion by 2029. This expansion is expected to further surge the demand for HDPE across the MEA region.

Adoption of recycled HDPE is a key trend of Middle East and Africa high density polyethylene (HDPE) market.

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Growing environmental concerns are boosting the adoption of recycled HDPE for manufacturing packaging materials, pipes, and other plastic products. This is further driven by the imposition of strict policies and regulations on minimising unsustainable plastic usage and the growing consumer awareness for eco-friendly products. Hence, key players in Middle East and Africa high density polyethylene (HDPE) market are going the extra mile to recycle HDPE plastics, enhancing their supply in the market. The ALPLA Group, an active leader in the HDPE industry launched a new brand ALPLA Recycling in July 2023 to consolidate all its HDPE recycling activities in different countries across the Middle East and Africa.

Technology-driven production process enhancing the productivity of high density polyethene (HDPE) industry in Middle East and Africa

As per the Middle East and Africa high density polyethylene (HDPE) market report, the integration of advanced technologies in the HDPE manufacturing process has increased its productivity and improved product quality, efficiency, and performance with added strength, flexibility, and chemical resistance. For instance, France-based Veolia drew a new partnership with TotalEnergies Marketing Middle East (TEMME) to launch its new HDPE recycling initiative in the UAE by deploying its digital recycling solution Recapp. It helped TotalEnergies optimise its HDPE recycling processes at TMME service centres.

Middle East and Africa High Density Polyethylene (HDPE) Market Trends

Oil and gas industry is creating a major high density polyethylene (HDPE) demand growth in Middle East and Africa

HDPE is extensively used to manufacture pipelines for the transportation of oil and gas, thus driving its growth in the MEA region. Its high strength-to-density ratio, resistance to chemicals and corrosion, and ability to withstand extreme temperatures make it an ideal choice for the purpose. Besides, they are flexible and easy to install compared to their counterparts and are hence suitable for remote locations, challenging terrains, as well as harsh environments such as deserts.

To meet their growing demand in the oil and gas sector, national and international market players are stepping into HDPE production across the MEA region. For instance, North American giant, Perma-Pipe International Holdings, Inc. announced the establishment of its new 6-hectare factory in the U.A.E. in 2023 to manufacture HDPE pipes for oil and gas transportation networks. Such efforts and investments are key to the overall growth of Middle East and Africa high density polyethylene (HDPE) market.

Middle East and Africa High Density Polyethylene (HDPE) Industry Segmentation

The EMR's report titled "Middle East and Africa High Density Polyethylene (HDPE) Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Application:

- Film and Sheet
- Injection Moulding
- Blow Moulding
- Wire and Cables
- Pipes and Tubes
- Others

Market Breakup by Feedstock:

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- Naphtha
- Natural Gas
- Others

Market Breakup by End Use:

- Packaging
- Transportation
- Electrical and Electronics
- Building and Construction
- Industry and Machinery
- Others

Market Breakup by Country:

- Saudi Arabia
- United Arab Emirates
- Nigeria
- South Africa
- Others

Middle East and Africa High Density Polyethylene (HDPE) Market Share

Packaging films and sheets are driving the Middle East and Africa high density polyethylene (HDPE) market expansion

The increasing sales of goods through e-commerce platforms are increasing the demand for HDPE packaging films and sheets, as they are durable, lightweight, cost-effective and sustainable, making it easy to transport goods to different locations. Besides, they are easy to recycle and hence generate minimal waste at the end of their life cycle. According to the Dubai Chamber of Commerce and Industry, UAE, one of the most developed e-commerce markets in the Middle East and Africa, is projected to generate almost USD 8 billion worth of sales by 2025 due to 100% mobile and internet coverage throughout the country. This is further expected to boost the demand for HDPE films and sheets in the region, leading to the growth of the Middle East and Africa high density polyethylene (HDPE) market.

Besides, the use of HDPE pipes and tubes in irrigation systems is also a key driver for market growth. The Middle East and African region mostly experiences a dry climate, making irrigation an essential requirement for agricultural productivity. Modern irrigation techniques such as drip and sprinkler systems use HDPE pipes and tubes for this purpose, as they are durable, flexible, and resistant to moisture as well as corrosion, increasing their demand in the agriculture industry.

Growing natural gas production is increasing the high density polyethylene (HDPE) consumption in Middle East and Africa

Natural gas is one of the highest-produced fossil fuels in the Middle East and Africa region. Manufacturers use natural gas as a raw material to produce ethylene which is further polymerised to form HDPE resin for various industrial applications such as making plastic pipes, containers, and packaging materials. In 2022, natural gas production in the Middle East exceeded 24 million terajoules, with Iran, Qatar, Saudi Arabia and UAE being the leading producers. As their share in gas production rises further during the coming years, the supply of HDPE in the market is expected to witness a sharp surge.

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Further, naphtha is also considered a cost-effective feedstock for the Middle East and Africa high density polyethylene (HDPE) market. Its leading producers in the region include Saudi Arabia, UAE, and Algeria. While the former two exceeded their production by over 16,000 metric tonnes in 2021, the latter exceeded its production by over 7,000 metric tonnes during the same period. With a further rise in naphtha production in these countries, the market for cost-effective HDPE is expected to grow enormously.

Growing Electricity Consumption is Leading the Middle East and Africa high density polyethylene (HDPE) market in the Electrical and Electronics Industry

The rising electricity consumption has resulted in the expansion of the power network across the Middle East and African region raising the consumption for electrical conduit pipes and cables. These pipes primarily contain HDPE due to its insulation properties, lightweight nature, and resistance to moisture as well as environmental stress. HDPE can also withstand high voltages, resist chemicals, and provide long-term durability supporting both the longevity and performance of electrical conduits and cables. As per the estimates of the World Bank, the Middle East accounted for 4.965MWh per capita of electricity consumption in 2022, with Qatar, Kuwait, UAE, and Saudi Arabia occupying the majority share. With a further increase in electricity consumption, the market for HDPE-based electrical conduit pipes and cables is expected to witness a sharp rise, thereby accelerating the Middle East and Africa high density polyethylene (HDPE) market development.

Middle East and Africa High Density Polyethylene (HDPE) Market Regional Analysis

Telecom Industry Driven by 5G Subscriptions is Increasing HDPE Consumption in Saudi Arabia

As per the Middle East and Africa high density polyethylene (HDPE) market report, telecom companies in Saudi Arabia are investing heavily in the expansion of 5G networks and infrastructure across the country, increasing the need for durable, high-performance materials such as HDPE for cable conduits and wires. HDPE conduits are lightweight and easy to install, which reduces the cost and hassle for telecom companies in urban as well as remote locations. Industry reports suggest that 5G users in Saudi Arabia by the end of 2022 exceeded 11.2 million, accounting for more than a quarter of the country's total mobile phone users. Further growth, expected in the coming years, will boost the HDPE demand in the country's telecom sector at a rapid pace.

Followed by Saudi Arabia, is the growing telecom sector of South Africa, which accounted for 4.4% of the total 5G subscriptions in the African Union in 2022. During this period the country's 5G subscriber base exceeded 5 million. Besides, UAE stood third in line with over 3.5 million 5G subscriber base in the Middle East, accounting for 17.5% of the region's share. This indicated an expansion of 5G infrastructure across these countries with the help of high-quality HDPE conduits and cables.

Competitive Landscape

Middle East and Africa high density polyethylene (HDPE) market key players are spanning their scope across several industries such as packaging, telecom infrastructure, automotive, and construction to meet the growing demand. Besides, they are increasingly adopting recycled HDPE to enhance the long-term growth and sustainability of the market.

Dow Inc.

The Dow Chemical Company, founded in 1897, Headquartered in Michigan, United States, the company makes various types of plastics, like polystyrene, polyurethane, polyethylene, polypropylene, and synthetic rubber. It also produces significant amounts of ethylene oxide, different acrylates, surfactants, and cellulose resins.

Exxon Mobil Corporation

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Exxon Mobil Corporation was formed by the merger of Exxon and Mobil in November, 1999. It is an oil and gas company, and its main portfolio includes providing products that enable modern life, including energy, chemicals, lubricants, and lower emissions technologies. The company also has investments and operations in petroleum and natural gas, coal, nuclear fuels, chemicals, and mineral ores.

#### Saudi Basic Industries Corporation (SABIC)

Established in 1976, SABIC is a global chemical company that manufactures and sells chemicals, plastics, metals, and fertilizers. Based in Riyadh, it is one of the largest petrochemical manufacturers in the world. The company produces a variety of products, including methanol, ethylene, propylene, benzene, toluene, xylene, industrial gases, thermoplastic resins, polyester, urea fertilizers, and both hot and cold rolled steel products.

#### Jam Petrochemical Company

JPC is the largest petrochemical company in Iran, making products like olefins, linear polyethylene, butadiene, and butane. Its headquarters are in Bushehr Province, Iran. JPC became a public joint stock company in 2010 and produces ethylene, propylene, and HDPE using advanced technologies so that they can be utilised in a variety of industrial applications including packaging.

Other key players considered in the Middle East and Africa high density polyethylene (HDPE) market report are the Ilam Petrochemical Co., LyondellBasell Industries N.V., Amir Kabir, Petrochemical Company, Marun Petro Chemical Group, and National Industrialization Company SJSC (Tasnee), among others.

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