

## **Middle-East And Africa Paper Cups - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Middle-East And Africa Paper Cups Market Analysis

The Middle-East and Africa paper cups market was valued at USD 734.09 million in 2025 and estimated to grow from USD 767.27 million in 2026 to reach USD 956.89 million by 2031, at a CAGR of 4.52% during the forecast period (2026-2031). A robust tourism rebound reinforces growth, the proliferation of food-delivery platforms, and sustained investments by regional converters in barrier-coating innovation. Regulatory deadlines in the Gulf Cooperation Council (GCC) nations are accelerating material substitution, while improving mill efficiency and corporate net-zero roadmaps strengthen demand for certified compostable coatings. Competitive intensity is moderate: multinational incumbents consolidate regional footprints to reduce costs, and local champions deploy capital toward solar-powered plants and biodegradable technologies to secure brand accounts across hospitality and quick-service restaurant (QSR) channels. Although raw-material volatility and electricity shortages persist in several import-dependent and Sub-Saharan markets, a diversified end-user base-spanning specialty cafes, institutional catering, and convenience retail-maintains a favorable baseline for revenue expansion in the paper cups market.

Middle-East And Africa Paper Cups Market Trends and Insights

Surging on-the-Go Hot-Drink Culture

Specialty coffee chains, workplace catering, and transit hubs are normalizing grab-and-go consumption across GCC cities, causing a structural uplift in premium hot-cup demand in the paper cups market. GCC hospitality revenue is projected to reach USD 48.1

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

billion by 2028, marking a 7.5% CAGR from 2022, and international arrivals are on an 8.1% annual trajectory to 116.2 million visitors. Hotels and cafes leverage differentiated cup graphics to reinforce brand identity, particularly during Dubai's targeted 400 global events and Qatar's 80-plus annual exhibitions. A 5.25% CAGR in coffee-chain volume through 2030 mirrors shifting consumer preferences among younger demographics who balance Western cafe culture with traditional Arabic coffee rituals. With every incremental store opening, operators standardize sustainable hot-cup specifications, thereby deepening penetration of the paper cups market.

#### Government Single-Use Plastic Bans (GCC, SADC)

Regulatory regimes gained momentum after COP28, prompting immediate procurement switches from plastic to paper. The UAE banned rigid polystyrene cups as early as 2006 and, through staged policies led by the Environment Agency - Abu Dhabi, extended restrictions to lids, stirrers, and cutlery in 2022. Dubai airports eliminated single-use plastics in 2020, while Saudi Arabia executed a three-stage plastic phase-out between 2017 and 2019. These frameworks force QSR chains, hotels, and retailers to favor fiber-based formats compliant with recyclability and future extended producer responsibility (EPR) mandates, underscoring the regulatory pull on the paper cups market.

#### Fragmented Converter Base Squeezing Margins

Hundreds of small converters compete primarily on unit price, limiting scale economies and dampening investments in high-performance coatings. As Huhtamaki consolidates UAE production and Hotpack Global ramps a multi-line Dubai plant, a two-tier structure emerges where large players secure hotel and multinational QSR contracts, while small firms remain trapped in commodity niches. Margin pressures restrict R and D budgets among smaller facilities, slowing broad-based technology diffusion in the paper cups market.

Other drivers and restraints analyzed in the detailed report include:

Food-Delivery Platform Expansion Tourism Rebound Powering HORECA Outlets Chronic Pulp Price Volatility Tied to Currency Swings

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Cold variants represented the fastest-moving segment with a 4.74% CAGR projection, even as hot cups accounted for a dominant 62.40% share of the paper cups market size in 2025. Technical advances such as Smart Planet's EarthCoating-Bio, which trims plastic content by up to 51%, address condensation and barrier limitations in chilled-drink formats. QSR chains and convenience retailers extend beverage menus to smoothies and protein shakes, elevating demand for durable cold cups that uphold product quality in 40 C ambient conditions common across the Gulf. Hot cups retain primacy in institutional catering and office coffee service, but double-wall innovations help hospitality operators reduce sleeve inventory and elevate guest comfort, ensuring sustained volume within the paper cups market.

In warmer months, iced beverage volumes surge, prompting retailers to order seasonal cold-cup SKUs with custom prints for brand promotion. This seasonal swing aligns with inbound tourism peaks, reinforcing revenue concentration in the summer quarters. Meanwhile, micro-roaster cafes and boutique tea houses favor textured hot-cup finishes for tactile differentiation. Continuous investments in both segments assure balanced growth across the paper cups market.

Polyethylene linings captured 70.80% of the overall paper cups market share in 2025, thanks to predictable performance and cost competitiveness. Yet polylactic acid and other compostable coatings are gaining a 4.83% CAGR edge as corporate buyers adopt

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

zero-plastic procurement guidelines. Water-based dispersion technology demonstrates recyclability in standard paper streams while matching grease and moisture barriers, easing municipal waste-sorting processes. GCC hotel chains already stipulate compostable credentials in tender documents, signaling a structural pivot toward eco-coatings.

PE-lined cups remain entrenched for high-temperature fill operations because of thermal-sealing robustness, but hybrid substrates that cut plastic content by one-third enjoy faster regulatory clearances. Converters investing early in aqueous or mineral-blend barriers gain first-mover advantages among multinational foodservice brands, consolidating premium tiers of the paper cups market.

The Middle-East and Africa Paper Cups Market is Segmented by Cup Type (Hot Paper Cups, Cold Paper Cups), Material Lining (Polyethylene Coated, Polylactic-Acid Compostable, and More), Application (Quick-Service Restaurants, Institutional Catering, Coffee Chains and Cafes, Retail and Convenience Stores), Capacity (Up To 7 Oz, 8-12 Oz, 13-16 Oz, Above 16 Oz), and Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Hotpack Packaging Industries LLC Huhtamaki Oyj Graphic Packaging International LLC Detpak South Africa (Pty) Ltd Gulf East Paper & Plastic Industries LLC Golden Paper Cup Manufacturing LLC Maimoon Papers Industry LLC Falcon Pack Industries LLC Al Bahri Packaging Materials Industry LLC Jass Pack Industries SAE Multipack International FZC Droup Al-Jubail Undertaking Est. Alexander Foods (Portion Cups) Pty Ltd Eco-Products South Africa (Pty) Ltd Vegware Ltd. (Regional Hub) Dart Container Corporation Go-Pak UK Ltd Seda International Packaging Group SpA Kap Cones Pvt Ltd

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 LANDSCAPE

- 4.1 Market Overview
- 4.2 Value / Supply-Chain Analysis
- 4.3 Regulatory Landscape
- 4.4 Technological Outlook
- 4.5 Market Drivers
  - 4.5.1 Surging On-the-Go Hot-Drink Culture
  - 4.5.2 Government Single-Use Plastic Bans (GCC, SADC)
  - 4.5.3 Food-Delivery Platform Expansion
  - 4.5.4 Tourism Rebound Powering HORECA Outlets
  - 4.5.5 Data-Centric Plant Efficiency Programs in Regional Mills

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.5.6 Rise of Plastic-Free Water-Based Barrier Cups
- 4.6 Market Restraints
  - 4.6.1 Fragmented Converter Base Squeezing Margins
  - 4.6.2 Chronic Pulp Price Volatility Tied to Currency Swings
  - 4.6.3 Under-Developed Cup-Recycling Streams
  - 4.6.4 Electrical-Energy Shortages in Sub-Saharan Africa
- 4.7 Import and Export Analysis (MEA Focus)
- 4.8 Industry Value Chain and Supply Chain Analysis
- 4.9 Regulatory Landscape
- 4.10 Technological Outlook
- 4.11 Porter's Five Forces Analysis
  - 4.11.1 Bargaining Power of Suppliers
    - 4.11.1.1 Bargaining Power of Buyers
    - 4.11.1.2 Threat of New Entrants
    - 4.11.1.3 Threat of Substitute Products
    - 4.11.1.4 Intensity of Competitive Rivalry

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Cup Type
  - 5.1.1 Hot Paper Cups
  - 5.1.2 Cold Paper Cups
- 5.2 By Material Lining
  - 5.2.1 Polyethylene (PE) Coated
  - 5.2.2 Polylactic-Acid (PLA) / Compostable
  - 5.2.3 Water-Based Barrier / Plastic-Free
- 5.3 By Application
  - 5.3.1 Quick-Service Restaurants (QSR)
  - 5.3.2 Institutional Catering
  - 5.3.3 Coffee Chains and Cafes
  - 5.3.4 Retail and Convenience Stores
- 5.4 By Capacity (oz)
  - 5.4.1 Up to 7 oz
  - 5.4.2 8 -12 oz
  - 5.4.3 13 -16 oz
  - 5.4.4 Above 16 oz
- 5.5 By Country
  - 5.5.1 Saudi Arabia
  - 5.5.2 United Arab Emirates
  - 5.5.3 Egypt
  - 5.5.4 South Africa
  - 5.5.5 Nigeria
  - 5.5.6 Turkey
  - 5.5.7 Kenya
  - 5.5.8 Rest of Middle East and Africa

## 6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 6.2 Strategic Moves

## 6.3 Market Share Analysis

6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

### 6.4.1 Hotpack Packaging Industries LLC

### 6.4.2 Huhtamaki Oyj

### 6.4.3 Graphic Packaging International LLC

### 6.4.4 Detpak South Africa (Pty) Ltd

### 6.4.5 Gulf East Paper & Plastic Industries LLC

### 6.4.6 Golden Paper Cup Manufacturing LLC

### 6.4.7 Maimoon Papers Industry LLC

### 6.4.8 Falcon Pack Industries LLC

### 6.4.9 Al Bahri Packaging Materials Industry LLC

### 6.4.10 Jass Pack Industries SAE

### 6.4.11 Multipack International FZC

### 6.4.12 Droup Al-Jubail Undertaking Est.

### 6.4.13 Alexander Foods (Portion Cups) Pty Ltd

### 6.4.14 Eco-Products South Africa (Pty) Ltd

### 6.4.15 Vegware Ltd. (Regional Hub)

### 6.4.16 Dart Container Corporation

### 6.4.17 Go-Pak UK Ltd

### 6.4.18 Seda International Packaging Group SpA

### 6.4.19 Kap Cones Pvt Ltd

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-needs Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Middle-East And Africa Paper Cups - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-25"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

