

Nigeria Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 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:

Nigeria Packaging Market Analysis

The Nigeria packaging market was valued at USD 0.92 billion in 2025 and estimated to grow from USD 0.95 billion in 2026 to reach USD 1.09 billion by 2031, at a CAGR of 2.93% during the forecast period (2026-2031). Demographic momentum, accelerating urbanization and local-content policies continue to anchor demand even as foreign-exchange pressures challenge raw-material procurement. Plastic remains the dominant substrate because of cost advantages and established filling lines, but sustainability mandates and e-commerce logistics are shifting growth toward paper and flexible formats. Domestic resin supply from the new Dangote polypropylene complex is set to curb import exposure, while tighter monetary rules are pushing converters to deepen local sourcing. Investors that align with recycling infrastructure, barrier solutions for agro-exports and anti-counterfeit closures are best positioned to capture long-term value in the Nigeria packaging market.

Nigeria Packaging Market Trends and Insights

Surge in Beverage Demand

Nigeria's beverage producers are scaling filling lines and secondary packaging to serve a consumer base exceeding 230 million. Nigerian Bottling Company alone operates nine plants and 36 distribution points, driving sustained PET, glass, and aluminum orders. Coca-Cola's Apapa collection hub, inaugurated in 2025, processes 13,000 t of PET annually and underpins a target of 35-40% recycled content by 2035. The trend toward larger pack sizes, typified by 60 cl carbonated drinks, lifts absolute material

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

consumption per unit sold. Breweries such as Guinness Nigeria, now under Tolaram ownership, are likewise pursuing volume strategies that reinforce demand for caps, labels, and cartons in the Nigeria packaging market. Sustained beverage volume growth is therefore set to add around 0.8 percentage points to the market CAGR through 2030.

Growing Penetration of E-Commerce and Last-Mile Delivery

Digital-commerce spending is accelerating on the back of smartphone uptake and improved payment rails. Urban merchants increasingly specify tamper-evident, brandable mailers, and low-minimum flexible pouches offered by firms like Pack Hub meet this need. Logistics enablers such as Terminal Africa are expanding export documentation services, broadening addressable demand for protective transit packaging. E-commerce buyers value damage-free delivery and unboxing aesthetics, propelling corrugated mailers, void fills and laminated film demand within the Nigeria packaging market. The segment's growth adds roughly 0.6% to the forecast CAGR and rewards converters capable of rapid customization and short print runs.

Strict Environmental and Recycling Mandates

NESREA's Extended Producer Responsibility rules require producers to finance take-back schemes and recycled-content thresholds, increasing compliance costs. Lagos State's enforcement of waste regulations sets the benchmark, and the federal Climate Change Act compels companies with 50+ employees to publish carbon plans. The first government-approved e-waste facility, inaugurated in 2024, demonstrates regulators' intent to expand circular-economy principles. Converters must redesign packs for recyclability or biodegradable performance, raising near-term capex and shaving 0.4% from the Nigeria packaging market CAGR.

Other drivers and restraints analyzed in the detailed report include:

Urban Middle-Class Expansion and Convenience Culture
Government Local-Content Push for FMCG Packs
FX Volatility Inflating Polymer and Paper Costs

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

Segment Analysis

Plastic retained a 48.02% share of the Nigeria packaging market in 2025, benefiting from ingrained filling lines across drinks, personal care, and industrial goods. The March 2025 start-up of Dangote's 900,000 tpa polypropylene plant ensures a steady resin supply that shields converters from currency swings. Rigid PET bottles and HDPE closures particularly gain from localized feedstock. Flexible polyolefin pouches, offered in minimum runs of 50 units by Hazken Digital, cater to SMEs seeking colorful, laminated prints. Nonetheless, ESG pressure and retail e-commerce lifting corrugated demand push paperboard to a 4.08% CAGR, the highest among major substrates.

Converters are diversifying into coated-paper wraps and molded-fiber trays to secure procurement from multinational FMCG firms committed to reducing virgin plastic. Coca-Cola's PET collection hub illustrates value-chain investments aimed at integrating recycled resin streams. Mohinani Group's PET recycling plants are expected to supplement recycled feedstock volumes regionally. Although biodegradable film suppliers like Bonniebio are piloting starch-based bags, adoption remains niche because of a 30-40% cost premium. Metal cans face aluminum price volatility, whereas container glass benefits from import bans on bottles above 150 ml that shield Beta Glass from Asian competition.

The Nigeria Packaging Market Report is Segmented by Packaging Type (Plastic Packaging, Paper Packaging, Container Glass, Metal Cans and Containers), Packaging Format (Flexible, and Rigid), End-Use Industry (Food, Beverage, Pharmaceuticals and

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Healthcare, Personal Care and Cosmetics, Industrial, E-Commerce, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Avon Crowncaps & Containers Nigeria Limited Beta Glass Plc Nampak Ltd Greif, Inc. Twinstar Industries Limited PrimePak Industries Nigeria Limited Sonnex Packaging & Plastic Industries Limited UB Packaging Nigeria Limited Quantum Packaging Nigeria Limited Victor Oscar Plastics & Packaging Company Limited Amcor plc Sealed Air Corporation Mondi plc Huhtamaki Oyj Tetra Pak International S.A. Crown Holdings, Inc. International Paper Company Silgan Holdings Inc. Alpla Werke Alwin Lehner GmbH & Co KG

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 Market Drivers
 - 4.2.1 Surge in demand from beverage industry
 - 4.2.2 Growing penetration of e-commerce and last-mile delivery
 - 4.2.3 Urban middle-class expansion and convenience culture
 - 4.2.4 Investments in on-shore converting capacity
 - 4.2.5 Government's local-content push for FMCG packs
 - 4.2.6 Export-oriented agri-value chains needing barrier packs
- 4.3 Market Restraints
 - 4.3.1 Strict environmental and recycling mandates
 - 4.3.2 FX volatility inflating polymer and paper costs
 - 4.3.3 Weak logistics infrastructure causing product damage
 - 4.3.4 Import restrictions on advanced filling machinery
- 4.4 Industry Value Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Bargaining Power of Suppliers
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitute Products
 - 4.7.5 Intensity of Competitive Rivalry

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.8 Impact of Macroeconomic Factors on the Market

4.9 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Packaging Type

5.1.1 Plastic Packaging

5.1.1.1 By Type

5.1.1.1.1 Rigid Plastic Packaging

5.1.1.1.1.1 By Material Type

5.1.1.1.1.1.1 Polyethylene (PE)

5.1.1.1.1.1.2 Polypropylene (PP)

5.1.1.1.1.1.3 Polyethylene Terephthalate (PET)

5.1.1.1.1.1.4 Polyvinyl Chloride (PVC)

5.1.1.1.1.1.5 Polystyrene (PS) and Expanded Polystyrene (EPS)

5.1.1.1.1.1.6 Other Material Types

5.1.1.1.1.2 By Product Type

5.1.1.1.1.2.1 Bottles and Jars

5.1.1.1.1.2.2 Caps and Closures

5.1.1.1.1.2.3 Trays and Containers

5.1.1.1.1.2.4 Other Product Types

5.1.1.1.1.3 By End-use Industry

5.1.1.1.1.3.1 Food

5.1.1.1.1.3.2 Beverage

5.1.1.1.1.3.3 Pharmaceutical

5.1.1.1.1.3.4 Cosmetics and Personal Care

5.1.1.1.1.3.5 Industrial

5.1.1.1.1.3.6 Other End-use Industry

5.1.1.1.2 Flexible Plastic Packaging

5.1.1.1.2.1 By Material Type

5.1.1.1.2.1.1 Polyethylene (PE)

5.1.1.1.2.1.2 Biaxially Oriented Polypropylene (BOPP)

5.1.1.1.2.1.3 Cast Polypropylene (CPP)

5.1.1.1.2.1.4 Other Material Types

5.1.1.1.2.2 By Product Type

5.1.1.1.2.2.1 Pouches and Bags

5.1.1.1.2.2.2 Films and Wraps

5.1.1.1.2.2.3 Other Product Types

5.1.1.1.2.3 By End-use Industry

5.1.1.1.2.3.1 Food

5.1.1.1.2.3.2 Beverage

5.1.1.1.2.3.3 Pharmaceutical

5.1.1.1.2.3.4 Cosmetics and Personal Care

5.1.1.1.2.3.5 Industrial

5.1.1.1.2.3.6 Other End-use Industry

5.1.1.2 By Product Type

5.1.1.2.1 Bottles and Jars

5.1.1.2.2 Pouches and Bags

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.1.1.2.3 Bulk-Grade Products
- 5.1.1.2.4 Other Product Types
- 5.1.1.3 By End-use Industry
 - 5.1.1.3.1 Food
 - 5.1.1.3.2 Beverages
 - 5.1.1.3.3 Cosmetics and Personal Care
 - 5.1.1.3.4 Pharmaceuticals
 - 5.1.1.3.5 Industrial
 - 5.1.1.3.6 Other End-use Industry
- 5.1.2 Paper Packaging
 - 5.1.2.1 By Product Type
 - 5.1.2.1.1 Folding Carton
 - 5.1.2.1.2 Corrugated Boxes
 - 5.1.2.1.3 Liquid Paperboard
 - 5.1.2.1.4 Other Product Type
 - 5.1.2.2 By End-use Industry
 - 5.1.2.2.1 Food
 - 5.1.2.2.2 Beverages
 - 5.1.2.2.3 E-commerce
 - 5.1.2.2.4 Other End-use Industry
- 5.1.3 Container Glass
 - 5.1.3.1 By Color
 - 5.1.3.1.1 Green
 - 5.1.3.1.2 Amber
 - 5.1.3.1.3 Flint
 - 5.1.3.1.4 Other Colors
 - 5.1.3.2 By End-use Industry
 - 5.1.3.2.1 Food
 - 5.1.3.2.2 Beverage
 - 5.1.3.2.2.1 Alcoholic
 - 5.1.3.2.2.2 Non-Alcoholic
 - 5.1.3.2.3 Personal Care and Cosmetics
 - 5.1.3.2.4 Pharmaceuticals (excluding Vials and Ampoules)
 - 5.1.3.2.5 Perfumery
- 5.1.4 Metal Cans and Containers
 - 5.1.4.1 By Material Type
 - 5.1.4.1.1 Steel
 - 5.1.4.1.2 Aluminum
 - 5.1.4.2 By Product Type
 - 5.1.4.2.1 Cans
 - 5.1.4.2.2 Drums and Barrels
 - 5.1.4.2.3 Caps and Closures
 - 5.1.4.2.4 Other Product Type
 - 5.1.4.3 By End-use Industry
 - 5.1.4.3.1 Food
 - 5.1.4.3.2 Beverage
 - 5.1.4.3.3 Chemicals and Petroleum

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.1.4.3.4 Industrial
- 5.1.4.3.5 Paints and coatings
- 5.1.4.3.6 Other End-use Industry
- 5.2 By Packaging Format
 - 5.2.1 Flexible
 - 5.2.2 Rigid
- 5.3 By End-use Industry
 - 5.3.1 Food
 - 5.3.2 Beverage
 - 5.3.3 Pharmaceuticals and Healthcare
 - 5.3.4 Personal Care and Cosmetics
 - 5.3.5 Industrial
 - 5.3.6 E-commerce
 - 5.3.7 Other End-use Industry

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 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 for key companies, Products and Services, and Recent Developments)
 - 6.4.1 Avon Crowncaps & Containers Nigeria Limited
 - 6.4.2 Beta Glass Plc
 - 6.4.3 Nampak Ltd
 - 6.4.4 Greif, Inc.
 - 6.4.5 Twinstar Industries Limited
 - 6.4.6 PrimePak Industries Nigeria Limited
 - 6.4.7 Sonnex Packaging & Plastic Industries Limited
 - 6.4.8 UB Packaging Nigeria Limited
 - 6.4.9 Quantum Packaging Nigeria Limited
 - 6.4.10 Victor Oscar Plastics & Packaging Company Limited
 - 6.4.11 Amcor plc
 - 6.4.12 Sealed Air Corporation
 - 6.4.13 Mondi plc
 - 6.4.14 Huhtamaki Oyj
 - 6.4.15 Tetra Pak International S.A.
 - 6.4.16 Crown Holdings, Inc.
 - 6.4.17 International Paper Company
 - 6.4.18 Silgan Holdings Inc.
 - 6.4.19 Alpla Werke Alwin Lehner GmbH & Co KG

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

- 7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Nigeria Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 100 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="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

