

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

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Report description:

Saudi Arabia Packaging Market Analysis

The Saudi Arabia packaging market is expected to grow from USD 11.2 billion in 2025 to USD 11.49 billion in 2026 and is forecast to reach USD 13.06 billion by 2031 at 2.59% CAGR over 2026-2031. Vision 2030's industrial-localization push, mandatory shelf-life labeling by the Saudi Food and Drug Authority (SFDA), and rapid e-commerce expansion together elevate packaging from a cost center to a competitiveness lever. Domestic FMCG producers now specify multilayer high-barrier films to meet longer shelf-life targets, while online retail adds volume to corrugated transit packs. Growth is therefore premium-driven: companies pay more for compliance, traceability, and sustainability. Corrugated converters, high-barrier film suppliers, and PET recyclers report healthier margins, even though overall tonnage grows modestly.

Saudi Arabia Packaging Market Trends and Insights

E-commerce Boom Driving Demand for Corrugated and Last-Mile Formats

National online sales hit USD 52.64 billion in 2024, a 25.82% jump that rippled directly into corrugated board orders. Parcel integrity over multi-node delivery now outranks aesthetic factors, so converters design double-wall boxes with edge-crush targets above 40 ECT. Logistics infrastructure, backed by a USD 266 billion spend, shortens lead times and pushes SKU proliferation. Retailers such as BinDawood allocate USD 390 million to new delivery hubs, locking in long-term corrugated contracts. E-commerce platforms additionally request inside-print branding for customer unboxing, increasing average unit value. The net

effect is a structural uplift in quality and margins for corrugators despite subdued macro volume.

Mandatory Shelf-Life Labeling Reform Accelerating Adoption of High-Barrier Films

SFDA now requires explicit "expiry" coding and tighter migration limits; brand owners, therefore, specify EVOH-based or metallized laminates that extend ambient shelf life beyond 12 months. Pharmaceutical fillers migrate from PVC to multilayer PP for blister packs to avoid halogens. Domestic food processors targeting GCC exports must also conform to EU-style barrier criteria, incentivizing local film extruders to invest in seven-layer lines. Capital intensity is high, but margins of up to 18% attract both SABIC downstream units and niche converters. Continuous SFDA audits reinforce adoption, anchoring premium price realization.

30% Excise Tax on Single-Use Plastics

Excise duties mirror earlier sugary-drink taxes and immediately raise PET and PS input costs. Brand owners explore oxo-biodegradable or reusable formats to bypass the levy, but supply is limited. Small foodservice SMEs struggle to absorb the hit, potentially switching to unlabeled imports that risk compliance breaches. For converters, near-term volume losses occur until substitute materials attain scale.

Other drivers and restraints analyzed in the detailed report include:

Vision 2030 Localization Incentives for FMCG Manufacturing
Rapid Growth of Ready-to-Eat Meal Services
Delayed Implementation of Food-Grade rPET Standards

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

Segment Analysis

Plastic held 35.29% of Saudi Arabia's packaging market share in 2025, equal to USD 3.95 billion of the Saudi Arabian packaging market size, yet faces volume headwinds from excise taxes and recycling targets. Paper and paperboard, boosted by e-commerce shipments, is set to outpace with a 3.18% CAGR. Strong domestic resin supply from SABIC and Sadara underpins plastic's cost edge, ensuring continued use in beverage, dairy, and industrial drums.

However, Oxo-biodegradable law phases and DRS programs force converters toward ISCC+ certified polymers. Paper's growth rests on corrugated demand and consumer appetite for fiber-based retail packs. Metal cans stay resilient in beverages because of infinite recyclability, while glass retains niche pharma applications. The material split, therefore, tilts gradually toward renewables without displacing plastic entirely.

Paper and paperboard products commanded 44.10% of 2025 volumes, equivalent to USD 4.94 billion Saudi Arabia packaging market size. Metal products, led by beverage cans, ride a 3.04% CAGR tailwind from carbonated-drink reformulation and energy-drink launches. Carton and rigid-box makers benefit from Vision 2030 localization incentives, supplying export-ready FMCG lines. Corrugated boxmakers secure long-term contracts with e-commerce retailers, anchoring cash flows.

Metal pack growth stems from can-line conversions and aerosol demand in personal-care categories; Crown Holdings' multi-year shipment growth validates resilience. Flexible film pouches and rigid plastic bottles remain essential in fast-moving segments but increasingly incorporate PCR. The hierarchy of product types thus depends on function, regulatory tolerance, and recycling economics rather than material cost alone.

The Saudi Arabia Packaging Market Report is Segmented by Material Type (Paper and Paperboard, Plastic, Metal, Container Glass),

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Product Type (Paper and Paperboard Products, Plastic Products, Metal Products, Container Glass Products), Packaging Format (Rigid Packaging Format, and Flexible Packaging Format), End-User (Food, Beverage, Pharmaceutical and Medical, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Napco National Company Obeikan Investment Group Saudi Arabian Packaging Industry W.L.L (SAPIN) Arabian Packaging Co. LLC Akram K. Bader & Partner Co. Printopack Abee Saudi Printing and Packaging Company Al-Shams Printing, Packaging and Trading Company PACFORT Limited Amcor plc Greif, Inc. Mauser Packaging Solutions Holding Company Tetra Pak Arabia Area AG Huhtamaki Saudi Arabia Ltd. International Paper Company Saudi Arabia Saudi Basic Industries Corporation (SABIC) Sealed Air Corporation Saudi Arabia Crown Packages Ltd. ASPCO

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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