

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

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Report description:

Saudi Arabia Paper And Paperboard Packaging Market Analysis

Saudi Arabia paper and paperboard packaging market size in 2026 is estimated at 1.69 million tonnes, growing from 2025 value of 1.62 million tonnes with 2031 projections showing 2.09 million tonnes, growing at 4.32% CAGR over 2026-2031. Government-led economic diversification, a 54% jump in industrial investments to SAR 1.5 trillion (USD 0.39 trillion) in 2024, and SAR 41.2 billion (USD 10.9 billion) in manufacturing FDI, elevate demand for protective and retail-ready formats across food, e-commerce, and chemical export supply chains. Corrugated boxes hold structural primacy because food and beverage producers account for 57.31% of end-use consumption, while folding cartons capture premium positioning as the fastest-growing format at 6.21% CAGR on the back of SKU proliferation. Vision 2030's 30-year income-tax waivers for regional headquarters lower operating costs for international converters, yet imported kraft-liner volatility and rising power tariffs press margins for local mills. Recycled fiber uptake is accelerating at 5.16% CAGR, but virgin grades still dominate because food-grade rules constrain circular options in direct-contact applications.

Saudi Arabia Paper And Paperboard Packaging Market Trends and Insights

Food and Beverage Demand Surge for Corrugated Transit Packaging

Robust population growth and rising disposable incomes sustain double-digit volume gains in packaged foods sold across supermarket, hypermarket, and quick-service channels. Non-oil exports hit SAR 458 billion (USD 122 billion) in 2023, with the food

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segment benefiting from 13.4% export expansion in Q1 2025 that necessitates moisture-resistant corrugated transit formats for longer shipping distances. Food processors widening halal-certified lines for GCC and African markets require barrier-coated liners that withstand ambient storage, a capability that lifts local demand for high-performance corrugating medium. Government food-security projects incentivize domestic cultivation of tomatoes, poultry, and dairy, amplifying secondary packaging volumes. Temperature-controlled logistics now reach 90% of Riyadh supermarkets, further advancing corrugated use. The combined effect underpins the Saudi Arabia paper and paperboard packaging market as a strategic growth engine for converters servicing food clients.

Plastic-Ban Policies Boosting Paper Conversion Volumes

Municipal bans on single-use plastic bags in Riyadh and Jeddah accelerate substitution to kraft paper carriers as retailers seek compliant options. Saudi Investment Recycling Company's 81% recycling target pushes brand owners toward fiber-based formats compatible with municipal recovery streams. QSR chains including AlBaik shifted in-store cups and wraps to paper-lined composites, raising short-run flexo orders for domestic converters. Government eco-labeling pilots reward products in recyclable paperboard, nudging FMCG portfolios toward folding cartons. Early adopters gain shelf visibility, reinforcing paper's environmental halo. The regulatory momentum shortens payback periods for new curtain coater and aqueous-barrier lines, sustaining capital expenditure by leading mills.

Imported Kraft-Liner Price Volatility

Global pulp supply tightness lifted kraft-liner spot prices 18% between 2023 and 2024, translating into margin compression for Saudi converters who import 92% of their linerboard. Hedging instruments remain limited on the regional commodity exchanges, exposing balance sheets to FX swings. Middle East Paper Company's 7% net loss in 2024 showcases how price spikes erode profitability even with integrated recycling capacity. Smaller plants resort to shorter customer contracts or pass-through surcharges, risking volume loss to plastic alternatives when box prices surge.

Other drivers and restraints analyzed in the detailed report include:

E-commerce Same-Day Delivery Fueling Lightweight Mailers
FMCG SKU Proliferation Requiring Short-Run Digital
Cartons
Power-Tariff Hikes Raising Mill OPEX

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

Segment Analysis

Corrugated boxes generated 44.86% of the Saudi Arabia paper and paperboard packaging market size in 2025 as retailers, food processors and e-commerce shippers sought rugged, stackable formats for palletized distribution. Folding cartons are closing the gap by registering 6.1% CAGR to 2031 thanks to digital printing flexibility that suits frequent artwork changes. The Saudi Arabia paper and paperboard packaging market continues to rely on virgin kraft fluting for heavy produce and industrial chemicals, yet high-performance recycled liners are gaining share in lighter fruit crates. Packages integrating water-based barrier coatings now appeal to dairy brands pursuing plastic-free aseptic alternatives.

Growing investments in multi-color flexo and high-speed gluers position local players to capture value from demand nuances, such as single-piece die-cut boxes for GCC cross-border exports. Liquid cartons, while smaller in tonnage, receive capital inflows from firms like Elopak seeking to localize production under Vision 2030 and thereby shorten lead times for dairy co-packers. Paper sacks benefit from infrastructure projects that ship bulk cement and gypsum across desert corridors, expanding volume beyond consumer channels. The expanded format mix presents converters with diversification options while preserving core corrugated

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scale economies, sustaining the Saudi Arabia paper and paperboard packaging market as a broad-based growth vehicle.

Food and beverage held 56.74% share of the Saudi Arabia paper and paperboard packaging market size in 2025, anchored by domestic processing capacity and the Kingdom's growing role as a date and poultry exporter. Online retail is the fastest-expanding customer vertical at 5.82% CAGR, driving demand for dimension-optimized mailing cartons that slash void space and freight cost. The Saudi Arabia paper and paperboard packaging market gains resilience from cross-sector pull: pharmaceuticals require tamper-evident cartons, while personal-care producers favor foil-laminated boxes for premium positioning.

Industrial users, including petrochemical and construction materials, source heavy-duty triple-wall corrugated for chemical drums and bulk bags, a niche that commands higher margins due to stringent burst strength specs. Quick-service restaurants pivot to grease-resistant wraps and clamshells as plastic bans tighten, reinforcing volume in specialty grease-barrier papers. Diversification across end-users cushions converters against cyclical shocks in any single sector while maintaining a food-centric revenue core.

The Saudi Arabia Paper and Paperboard Packaging Market Report is Segmented by Packaging Type (Folding Cartons, Corrugated Boxes, Liquid Cartons, Paper Bags and Sacks, and Other Packaging Types), End-User Industry (Food and Beverage, and More), Material Source (Virgin Fiber, and More), Packaging Level (Primary Packaging, and More), and Geography. The Market Forecasts are Provided in Terms of Volume (Tonnes).

List of Companies Covered in this Report:

Gulf Carton Factory Company Eastern Pak Limited United Carton Industries Company (UCIC) Gulf East Paper & Plastic Industries LLC Obeikan Investment Group NAPCO National Middle East Paper Company (MEPCO) Western Modern Packaging Co. Ltd Tetra Pak Arabia Smurfit Westrock plc Hotpack Packaging Ind. LLC Al Kifah Paper Products

Additional Benefits:

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

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