

## **Saudi Arabia Plastic 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:**

Saudi Arabia Plastic Packaging Market Analysis

The Saudi Arabia plastic packaging market is expected to grow from USD 8.59 billion in 2025 to USD 8.86 billion in 2026 and is forecast to reach USD 10.31 billion by 2031 at 3.15% CAGR over 2026-2031. The steady pace of expansion aligns with Vision 2030's localization incentives that draw global converters into specialized clusters such as NEOM and Ras Al Khair. Rising non-oil exports, a vibrant food-and-beverage sector, and sustained population growth underpin demand for lightweight, high-barrier formats. Brand owners are shifting toward multilayer pouches and recyclable mono-material films to curb logistics costs and comply with Saudi Standards, Metrology and Quality Organization (SASO) requirements. Meanwhile, integrated petrochemical producers leverage feedstock advantages to stabilize resin pricing for domestic converters amid global volatility.

Saudi Arabia Plastic Packaging Market Trends and Insights

Rising Demand from Food and Beverage Sector for Convenient Lightweight Packaging

Rapid urbanization and a median age below 30 propel on-the-go consumption that favors portion-controlled pouches and resealable stand-up bags. Domestic manufacturers expanding chilled ready-meal lines rely on multilayer films to prolong shelf life and cut food waste. Vision 2030's 'Saudi Made' labeling initiative magnifies export opportunities, driving converters to adopt higher oxygen-barrier laminates fit for trans-continental shipping. Retailers also push for downgauged rigid bottles to reduce freight emissions, helping the Saudi Arabia plastic packaging market achieve incremental volume gains without proportional resin

**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)

growth.

## Government Regulations Promoting Oxo-Biodegradable Plastics Compliance

The National Center for Waste Management targets a 40% recycling rate by 2035, spurring mandatory oxo-biodegradable additives in single-use shopping bags. Early adoption zones in NEOM and Ras Al Khair function as regulatory sandboxes where converters test ISCC+-certified resins supplied by SABIC under its TRUCIRCLE program. As SASO standards tighten life-cycle assessments, brand owners lock in longer-term supply contracts for certified polymers, supporting mid-single-digit price premiums that buoy margins across the Saudi Arabia plastic packaging market.

## Volatility in Crude-Derived Resin Prices Squeezing Converter Margins

Spot LDPE prices swung 27 % across 2024-2025, eroding the gross margin of non-integrated converters by nearly 400 basis points. SABIC posted a SAR 1.2 billion net loss in early 2025, citing unfavorable spreads between naphtha and polyethylene. Smaller film companies struggle to hedge costs, prompting accelerated interest in long-term off-take with domestic crackers.

Other drivers and restraints analyzed in the detailed report include:

Expansion of E-commerce and Modern Retail Accelerating Flexible Packaging Uptake  
Growing Pharmaceutical Manufacturing Under Vision 2030  
Boosting Sterile Packaging  
Low Domestic Plastic Recycling Infrastructure Limiting Circular Packaging Adoption

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

## Segment Analysis

Rigid containers generated 52.12% of 2025 revenue, anchored by PET water bottles and HDPE jerrycans that satisfy stringent SASO drop-test criteria. That base ensures predictable throughput across the Saudi Arabia plastic packaging market size even as unit growth slows to 2.03% annually. Flexible formats, however, are tracking a 4.25% CAGR, thanks to better cube efficiency and lower last-mile damages for e-commerce shipments. Converter orders for 11-layer blown-film lines surged 18% in 2024, allowing local firms to supply high-oxygen-barrier snack pouches previously imported. Supermarkets amplify uptake by dedicating 15% more shelf space to stand-up bags of rice and pulses, validating retailer willingness to reconfigure planograms in favor of flexible packs.

Demand drivers vary by channel: HORECA buyers cling to rigid gallon jugs for water dispensers, whereas beauty brands launch refill pouch programs that cut plastic weight by 70% per use cycle. The combined result supports a gradual, rather than disruptive, substitution pattern that keeps overall tonnage balanced while lifting value density in the Saudi Arabia plastic packaging market.

Polyethylene retained 31.05% revenue share in 2025, its versatility spanning shrink film, squeezable tubes, and detergent bottles. Volume resilience ensures that polyethylene still represents over one-third of the Saudi Arabia plastic packaging market share despite feedstock gyrations. Specialty barriers led by EVOH, cyclic olefins, and metallized PET record a 4.32% CAGR, buoyed by date export pouches and pharma blister demand. SABIC's pilot plant for advanced barrier resins inside Riyadh Techno-Valley will scale to 50 kt/yr by 2027, offering local converters secure supply of high-oxygen-barrier grades.

Polypropylene enjoys steady traction in snack-food overwraps where stiffness and clarity edge out LDPE. PET remains dominant in carbonated soft drinks due to carbonation retention and cost parity with returnable glass. Conversely, PVC clings to industrial chemical duty lines but faces gradual phase-out in consumer goods following SASO hazard labeling updates.

**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)

The Saudi Arabia Plastic Packaging Market Report is Segmented by Packaging Type (Rigid Plastic, and Flexible Plastic), Material (Polyethylene, PET, Polypropylene, Polystyrene and EPS, PVC, EVOH and More), End-User Industry (Food, Beverage, Healthcare and Pharmaceutical, Personal Care and More), Pack Format (Bottles and Jars, Caps and Closures, Pouches and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

National Paper Products Company Akram K. Bader and Partner Co. Sealed Air Saudi Arabia Co. Ltd Saudi Basic Industries Corporation (SABIC) Arabian Plastic Industrial Company Limited (APICO) Zamil Plastic Industries Co. Arabian Plastic Industrial Company Limited Takween Advanced Industries Advanced Flexible Packaging Co. Gulf Packaging Industries Ltd Octal Group Obeikan Investment Group Al Watania Plastics Filling and Packing Materials Mfg Co. (FIPCO) Amcor plc Al-Rowad National Plastic Co.

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 Rising demand from food and beverage sector for convenient lightweight packaging
- 4.2.2 Government regulations promoting oxo-biodegradable plastics compliance
- 4.2.3 Expansion of e-commerce and modern retail accelerating flexible packaging uptake
- 4.2.4 Growing pharmaceutical manufacturing under Vision 2030 boosting sterile packaging
- 4.2.5 Localization incentives for polymer conversion in Ras Al Khair and NEOM clusters
- 4.2.6 Surge in date exports driving high-barrier multilayer pouch adoption

#### **4.3 Market Restraints**

- 4.3.1 Volatility in crude-derived resin prices squeezing converter margins
- 4.3.2 Low domestic plastic recycling infrastructure limiting circular packaging adoption
- 4.3.3 Water rationalization initiatives reducing bottled-water demand
- 4.3.4 Import duty exemptions for paper-based substitutes eroding plastic share

#### **4.4 Industry Value Chain Analysis**

#### **4.5 Regulatory Landscape**

#### **4.6 Technological Outlook**

#### **4.7 Porter's Five Forces Analysis**

##### **4.7.1 Threat of New Entrants**

**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)

- 4.7.2 Bargaining Power of Buyers
- 4.7.3 Bargaining Power of Suppliers
- 4.7.4 Threat of Substitutes
- 4.7.5 Intensity of Competitive Rivalry

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Packaging Type
  - 5.1.1 Rigid Plastic
  - 5.1.2 Flexible Plastic
- 5.2 By Material
  - 5.2.1 Polyethylene (HDPE, LDPE, LLDPE)
  - 5.2.2 Polyethylene Terephthalate (PET)
  - 5.2.3 Polypropylene (PP and BOPP/CPP)
  - 5.2.4 Polystyrene and EPS
  - 5.2.5 Polyvinyl Chloride (PVC)
  - 5.2.6 Ethylene-Vinyl Alcohol (EVOH) and Other Barrier Plastics
- 5.3 By End-user Industry
  - 5.3.1 Food
  - 5.3.2 Beverage
  - 5.3.3 Healthcare and Pharmaceutical
  - 5.3.4 Personal Care and Cosmetics
  - 5.3.5 Household and Industrial Chemicals
- 5.4 By Pack Format
  - 5.4.1 Bottles and Jars
  - 5.4.2 Caps, Closures and Dispensing Systems
  - 5.4.3 Pouches and Sachets
  - 5.4.4 Trays, Cups and Tubs
  - 5.4.5 Stretch and Shrink Films

## 6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves and Developments
- 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 National Paper Products Company
  - 6.4.2 Akram K. Bader and Partner Co.
  - 6.4.3 Sealed Air Saudi Arabia Co. Ltd
  - 6.4.4 Saudi Basic Industries Corporation (SABIC)
  - 6.4.5 Arabian Plastic Industrial Company Limited (APICO)
  - 6.4.6 Zamil Plastic Industries Co.
  - 6.4.7 Arabian Plastic Industrial Company Limited
  - 6.4.8 Takween Advanced Industries
  - 6.4.9 Advanced Flexible Packaging Co.
  - 6.4.10 Gulf Packaging Industries Ltd
  - 6.4.11 Octal Group
  - 6.4.12 Obeikan Investment Group

**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)

- 6.4.13 Al Watania Plastics
- 6.4.14 Filling and Packing Materials Mfg Co. (FIPCO)
- 6.4.15 Amcor plc
- 6.4.16 Al-Rowad National Plastic Co.

## 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](mailto:support@scotts-international.com)

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

## Saudi Arabia Plastic 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="2026-02-10"/>
		Signature	

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

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

www.scotts-international.com



**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)