

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

Market Report | 2026-02-09 | 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:

South Africa Plastic Packaging Market Analysis

The South Africa plastic packaging market is expected to grow from USD 2.66 billion in 2025 to USD 2.74 billion in 2026 and is forecast to reach USD 3.15 billion by 2031 at 2.86% CAGR over 2026-2031. Demand holds firm as e-commerce fulfillment, food processing expansion, and localization incentives offset electricity supply volatility and resin price swings. Material substitution toward mono-material films accelerates the shift from rigid to flexible formats, while recycling investments anchor circular-economy value chains across beverages and personal care. Converter margins remain under pressure from rand depreciation and feedstock costs, yet off-grid power solutions and digitalized operations bolster productivity. Intensifying regulatory scrutiny of single-use plastics simultaneously sparks innovation in biodegradable resins and premium recycled content, positioning the South Africa plastic packaging market to capture both domestic and export opportunities into the Southern African Customs Union.

South Africa Plastic Packaging Market Trends and Insights

Growing Demand for Consumer Goods

Household final-consumption expenditure rebounded 1.4% quarter-on-quarter in Q2 2024, restoring packaging volumes across food, beverages, and personal care. Flexible pouches absorbed much of this lift, capturing 28.42% market share in 2024 owing to portion control, portability, and value positioning. Township retail expansion fuels demand for small pack sizes that match

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

disposable-income realities, while the Small Enterprise Manufacturing Support Programme helps converters tap these micro-market niches. Food producers extend shelf life via oxygen-barrier films that also curb food waste in rural distribution corridors. As brand owners prioritize on-shelf differentiation, the South Africa plastic packaging market gains further impetus from graphics-rich laminates and lightweight rigid options.

Expansion of E-commerce Logistics and Last-mile Delivery

Online retail penetration surpasses 5% of total commerce in 2025, triggering sizeable secondary-pack demand for shippers and cushioning inserts. Reusable corrugated-plastic hybrids lower return-trip damages, whereas lightweight mailers cut fulfillment freight costs by up to 20%. Tamper-evident and moisture-barrier pouches dominate pharmaceutical and beauty shipments that require product integrity assurance. Packaging equipped with QR-enabled track-and-trace boosts consumer confidence and reduces reverse-logistics friction. Collectively, these dynamics reinforce volume upside for the South Africa plastic packaging market in dense urban nodes and emerging secondary cities.

Volatile Resin Prices and Environmental Concerns

Rand depreciation magnifies global crude-linked resin swings, compressing converter margins and complicating contract pricing. Brand owners adopting plastic-reduction targets stall volume growth in legacy rigid formats. Import reliance on specialty additives exposes local plants to shipping delays, while limited domestic petrochemical capacity restricts hedging options. Heightened consumer eco-awareness channels demand toward bio-based or recycled inputs, forcing converters to retool lines and qualify new suppliers. These factors collectively temper upside for the South Africa plastic packaging market despite underlying consumption gains.

Other drivers and restraints analyzed in the detailed report include:

Localization Incentives under South Africa's Industrial Policy
Rising Adoption of Mono-material Flexible Packs for Recyclability
Electricity "Load-shedding" Disrupting Production Lines

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

Segment Analysis

Polyethylene retained 32.05% of the South Africa plastic packaging market share in 2025, thanks to unrivaled versatility across carrier bags, shrink films, and pharmaceutical vials. Metallocene-catalyst grades permit thinner gauges without sacrificing seal integrity, lowering resin use per SKU and helping brand owners meet plastic-reduction pledges. Polypropylene follows, leveraging heat resistance critical for microwave-able ready meals.

Polyethylene terephthalate is projected to post the highest 3.71% CAGR, buoyed by bottle-to-bottle recycling that tightens closed-loop supply and enhances food-grade credentials. Capital injections at Extrupet's Germiston plant coupled with PETCO's collection network elevate rPET content in beverage bottles well beyond the statutory 30% threshold. Polyvinyl chloride applications persist in IV-fluid bags and blister packs where chemical resistance trumps substitution efforts, while niche biodegradable polymers gain modest traction under premium organic-food labels.

Pouches captured 28.10% of the South Africa plastic packaging market size in 2025, underpinned by urban consumer preference for portability, tear-open convenience, and resealability. Coffee, pet food, and cosmetics increasingly migrate into stand-up pouches with laser-scored easy-open spouts.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Films and wraps will accelerate at a 3.55% CAGR through 2031 as produce exporters adopt high-oxygen-transmission films that delay ripening and slash wastage in cross-border supply chains. Bottles and jars retain beverage and personal-care footholds due to merchandising familiarity, yet lightweight PET iterations shave gram weight by 9% on 500 ml formats without compromising top-load. Technical consultations with the University of Pretoria spotlight changeover optimization that trims downtime on multi-format lines.

The South Africa Plastic Packaging Market Report is Segmented by Material (Polyethylene, Polypropylene, Polyvinyl Chloride, and More), Product Type (Bottles and Jars, Pouches, and More), Packaging Format (Rigid, and Flexible), End-User Industry (Food, Beverages, Healthcare and Pharmaceuticals, Personal and Home Care, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Amcors plc Nampak Ltd Mpack Ltd Constantia Flexibles GmbH Mondi plc Sealed Air Corporation Tetra Pak International SA Italtac (Pty) Ltd Niroo Plastics (Pty) Ltd ALPLA Werke Alwin Lehner GmbH & Co KG Plastipak Holdings Inc. Transpaco Ltd Polyoak Packaging Group (Pty) Ltd Boxmore Packaging (Pty) Ltd Greif Inc. Cibapac (Pty) Ltd Hosaf (Pty) Ltd Mpack Plastics (Pty) 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 Market Drivers
 - 4.2.1 Growing Demand for Consumer Goods
 - 4.2.2 Favourable Material Properties of Plastics
 - 4.2.3 Expansion of E-commerce Logistics and Last-mile Delivery
 - 4.2.4 Localisation Incentives under South Africa's Industrial Policy
 - 4.2.5 Surge in Cannabis-derived Food and Pharma Packaging
 - 4.2.6 Rising Adoption of Mono-material Flexible Packs for Recyclability
- 4.3 Market Restraints
 - 4.3.1 Volatile Resin Prices and Environmental Concerns
 - 4.3.2 Stricter Regulations on Single-use Plastics
 - 4.3.3 Electricity "Load-shedding" Disrupting Production Lines
 - 4.3.4 Recycled-resin Supply Constraints from Informal Collection
- 4.4 Industry Value Chain Analysis
- 4.5 Regulatory Landscape

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 4.6 Technological Outlook
- 4.7 Impact of Macroeconomic Factors on the Market
- 4.8 Porter's Five Forces Analysis
 - 4.8.1 Threat of New Entrants
 - 4.8.2 Bargaining Power of Buyers
 - 4.8.3 Bargaining Power of Suppliers
 - 4.8.4 Threat of Substitute Products
 - 4.8.5 Intensity of Competitive Rivalry
- 4.9 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Material
 - 5.1.1 Polyethylene (PE)
 - 5.1.2 Polypropylene (PP)
 - 5.1.3 Polyvinyl Chloride (PVC)
 - 5.1.4 Polyethylene Terephthalate (PET)
 - 5.1.5 Other Materials
- 5.2 By Product Type
 - 5.2.1 Bottles and Jars
 - 5.2.2 Pouches
 - 5.2.3 Bags
 - 5.2.4 Films and Wraps
 - 5.2.5 Other Product Types
- 5.3 By Packaging Format
 - 5.3.1 Rigid
 - 5.3.2 Flexible
- 5.4 By End-user Industry
 - 5.4.1 Food
 - 5.4.2 Beverages
 - 5.4.3 Healthcare and Pharmaceuticals
 - 5.4.4 Personal and Home Care
 - 5.4.5 Other End-user Industries

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 Amcor plc
 - 6.4.2 Nampak Ltd
 - 6.4.3 Mpact Ltd
 - 6.4.4 Constantia Flexibles GmbH
 - 6.4.5 Mondi plc
 - 6.4.6 Sealed Air Corporation
 - 6.4.7 Tetra Pak International SA
 - 6.4.8 Italtac (Pty) Ltd

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 6.4.9 Niro Plastics (Pty) Ltd
- 6.4.10 ALPLA Werke Alwin Lehner GmbH & Co KG
- 6.4.11 Plastipak Holdings Inc.
- 6.4.12 Transpaco Ltd
- 6.4.13 Polyoak Packaging Group (Pty) Ltd
- 6.4.14 Boxmore Packaging (Pty) Ltd
- 6.4.15 Greif Inc.
- 6.4.16 Cibapac (Pty) Ltd
- 6.4.17 Hosaf (Pty) Ltd
- 6.4.18 Mpact Plastics (Pty) Ltd

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

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

Market Report | 2026-02-09 | 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

