A Ten Year Strategic Outlook for the Global Flexible Plastic Packaging Market

Sample pages

Commodity Inside Ltd

Sample Pages- A Ten Year Strategic Outlook for the Global Flexible Plastic Packaging Market

Chapter 1- Executive summary

1.1 Changes in the global flexible plastic packaging industry

1.2 Cost effectiveness to drive the market in emerging markets

1.3 Trends and developments in flexible plastic packaging industry

1.4 End use sector dynamics

1.5 Methodology

Chapter 2- North America

2.1 Market review

2.2 Outlook

2.3 Major companies

2.4 Salient statistics

Chapter 3- Europe

3.1 Market review

3.2 Outlook

3.3 Major companies

3.4 Salient statistics

Chapter 4- Latin America

4.1 Market review

4.2 Outlook

4.3 Major companies

4.4 Salient statistics

Chapter 5- Asia

5.1 Market review

5.2 Outlook

5.3 Major companies

5.4 Salient statistics

Chapter 6- Middle East and Africa

6.1 Market review

6.2 Outlook

6.3 Major companies

6.4 Salient statistics

Chapter 7- Oceania

7.1 Market review

7.2 Outlook

7.3 Major companies

7.4 Salient statistics

Chapter 8- Trends and developments

8.1 Increased substitutions

8.2 Pouch a leading driver

8.3 Macroeconomic indicators

8.4 Population growth

8.5 Support from end use sectors

8.6 Emerging markets

8.7 The changing consumer behaviour

8.8 Cost effectiveness and the rising middle class

8.9 Rigid plastic packaging versus flexible plastic packaging

List of tables

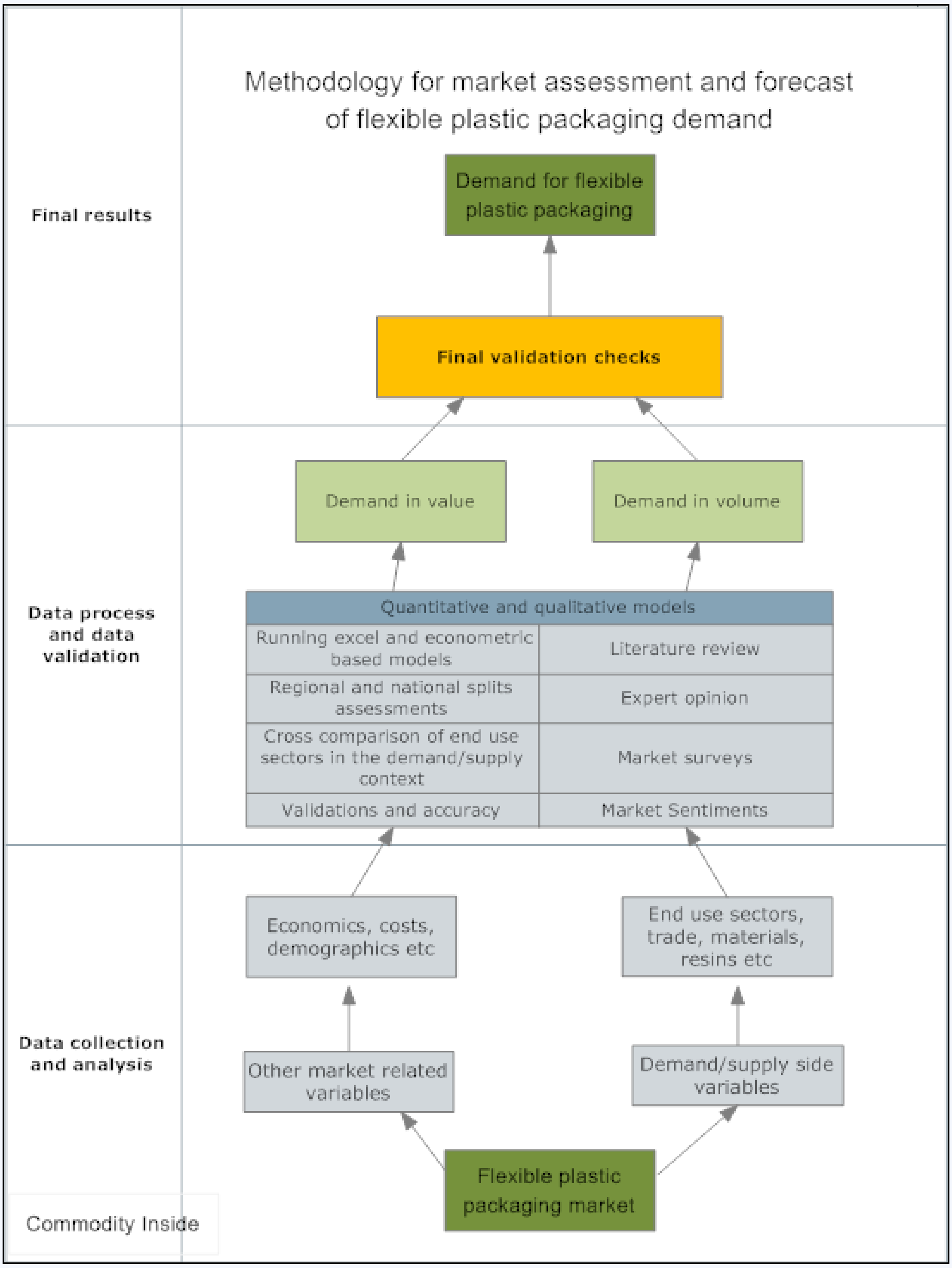
List of figures

1.6 Methodology

We have used a broad range of primary and secondary data to assess the market for the flexible plastic packaging in both volume and value terms as well as its end use markets. The starting point of our research was employing a literature review and extensive market research where we used a number of external sources for instance national and international industry associations, company reports and data, experts' opinions, trade statistics, end use sectors dynamics, industry news, policy documents, government bodies etc. We have then incorporated all our findings into our proprietary detailed excel based model which encompassed the whole world by regions and important countries. We have developed numerous validation tools which continuously crossed checked the robustness of our historical data ad forecasts.

For our market forecasts, we have developed excel based forecast model which was underpinned by an econometric model. We have considered a number of variables in our forecasts including GDP, Population, GDP per capita income, urbanisation etc. In our forecast we have also used SWOT analysis to understand the impact of various factors influencing the growth of the rigid plastic packaging industry.

Both our historical and forecast data have also been crossed checked in the context of upstream (plastic production and plastic substitutes; various packaging materials such as rigid plastic packaging, paper packaging, glass packaging, metal packaging etc) and downstream (food, beverages, household, healthcare, personal care etc) industries.


Methodology for market assessment and forecast of flexible plastic packaging demand
Final results
Demand for flexible plastic packaging
Final validation checks
Data process and data validation
Demand in value
Demand in volume
Quantitative and qualitative models
Running excel and econometric based models
Literature review
Regional and national splits assessments
Expert opinion
Cross comparison of end use sectors in the demand/supply context
Market surveys
Validations and accuracy
Market Sentiments
Data collection and analysis
Economics, costs, demographics etc
End use sectors, trade, materials, resins etc
Other market related variables
Demand/supply side variables
Flexible plastic packaging market
Commodity Inside

6. Middle East and Africa

Table 6.1: Middle East and Africa flexible plastic packaging demand 2013-2025 (million tonnes, % change)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Demand	1.02	1.08	1.15	1.23	1.32	1.41	1.52	1.63	1.76	1.89	2.02	2.16	2.30
% Change		6.0%	6.5%	6.7%	7.0%	7.3%	7.4%	7.6%	7.5%	7.4%	7.1%	6.8%	6.5%
Global Share													

Figure 6.1: Middle East and Africa flexible plastic packaging demand 2013-2025 (million tonnes)

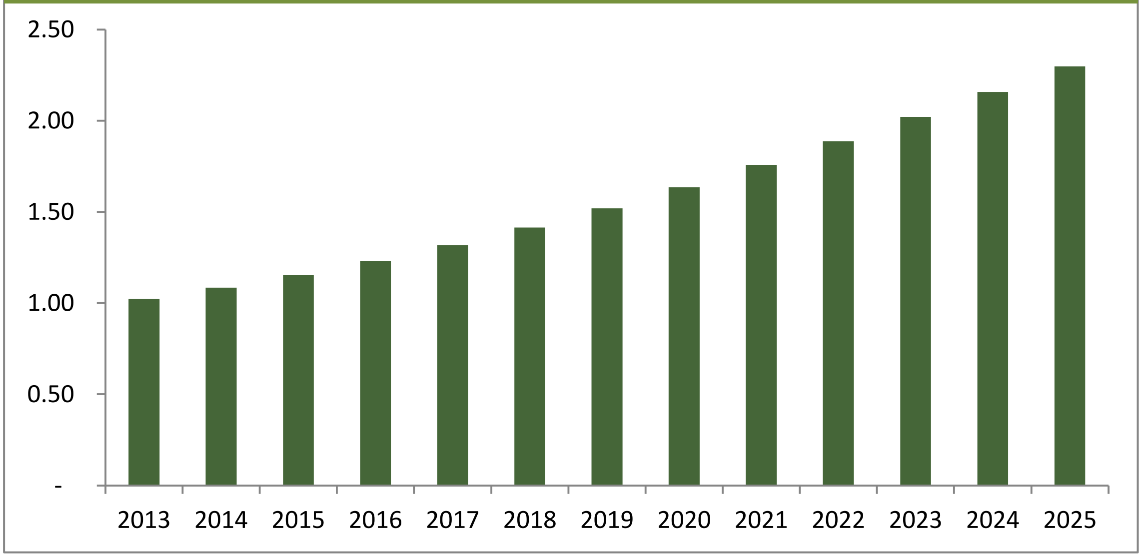


Figure 6.2: Middle East and Africa flexible plastic packaging demand share in the world 2013-2025 (% share)

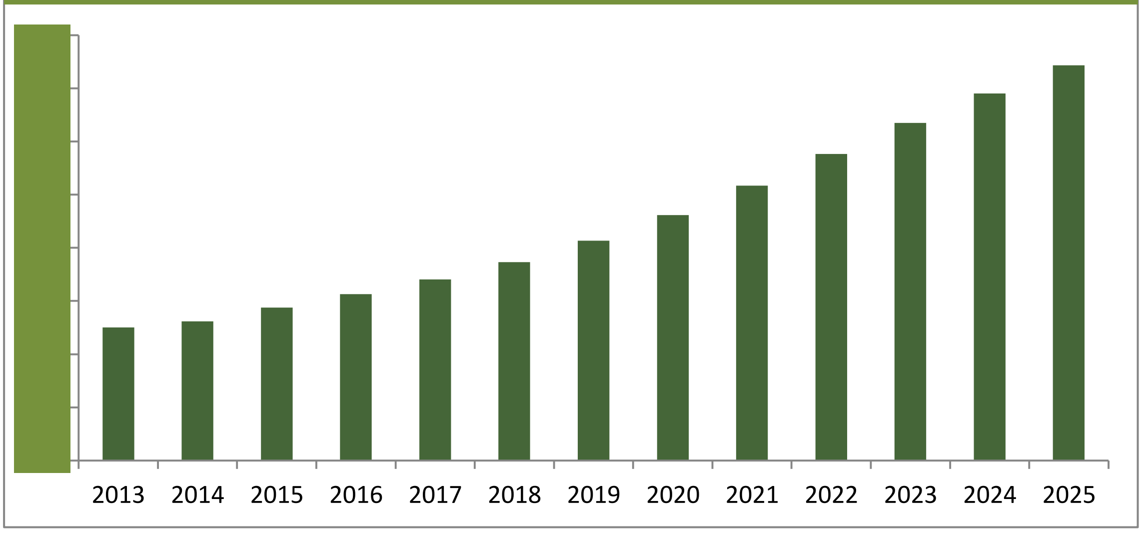
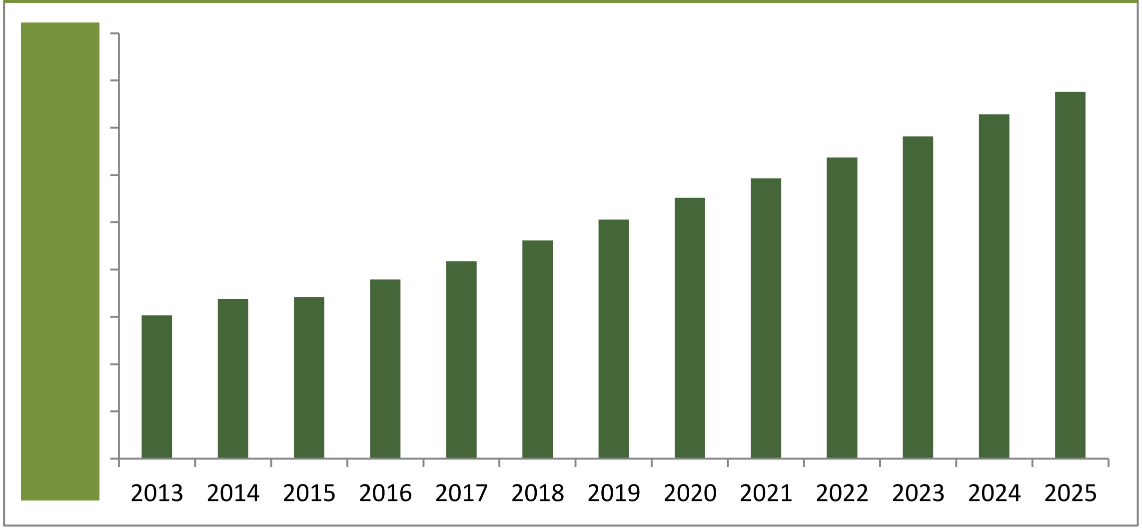


Table 6.2: Middle East and Africa flexible plastic packaging demand 2013-2025 ($ billion, % change)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Demand													
% Change													

Figure 6.3: Middle East and Africa flexible plastic packaging demand 2013-2025 ($ billions)



6.1. Market review

We assess that the Middle East & African Flexible plastic Packaging Market was around 1.08 tonnes in 2014, which registered growth of 6% year-on-year. Due to growing economic growth and improvement in transport and distribution infrastructure, demand for flexible plastic packaging has been on the rise as well as multinational brand owners are exploring the potential for local packaged products to satisfy the region's expanding needs. Currently the top ten countries in the region are taking into account more than half of the total regional demand. However, per capita consumption of flexible plastic packaging in these top ten countries is still lower than the average consumption in developed countries. This opens a wide range of opportunities for both regional and international packaging companies to explore the market.

The region has been dominated by major regional suppliers of flexible plastic packaging producers, while the presence of leading international is almost negligible. In GCC, majority of manufacturers and convertors are based in the UAE which satisfy demand for both domestic and regional consumers. The free trade zones, proximity to the region through ports and friendly government policies, UAE is witnessing high foreign direct investment.

6.2. Outlook

6.3. Major companies

6.4. Salient statistics

Table 6.3: Middle East and Africa flexible plastic packaging demand by country 2013-2025 (million tonnes)													
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Algeria													
Egypt													
Iran													
Iraq													
Morocco													
Nigeria													
Saudi Arabia													
South Africa													
UAE													
Other M&A													

Table 6.4: Middle East and Africa flexible plastic packaging demand by country 2013-2025 (% year-on-year growth)													
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Algeria													
Egypt													
Iran													
Iraq													
Morocco													
Nigeria													
Saudi Arabia													
South Africa													
UAE													
Other M&A													

Table 6.5: Real GDP growth in selected countries in Middle East and Africa by country 2013- 2025 (%)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Algeria	2.7%	4.1%	4.1%	3.8%	4.1%	4.2%	4.1%	4.0%	3.8%	3.6%	3.9%	4.0%	3.8%
Egypt	2.1%	2.6%	2.6%	4.7%	4.6%	4.5%	4.4%	4.4%	4.3%	4.3%	4.3%	4.2%	4.2%
Iran	-5.8%	1.5%	1.5%	3.1%	3.2%	3.0%	3.0%	3.4%	3.5%	3.5%	3.5%	3.6%	3.6%
Iraq	4.0%	1.3%	1.3%	6.8%	6.3%	6.6%	6.5%	6.3%	6.1%	5.9%	5.8%	5.7%	5.6%
Morocco	4.4%	2.7%	2.7%	5.2%	5.0%	4.4%	3.8%	3.7%	3.5%	3.5%	3.3%	3.0%	2.9%
Nigeria	7.3%	6.8%	6.8%	7.9%	6.6%	6.3%	6.0%	5.7%	5.4%	5.1%	4.9%	4.6%	4.4%
Saudi Arabia	3.8%	4.3%	4.3%	4.7%	4.7%	4.5%	4.4%	4.4%	4.4%	4.3%	4.3%	4.4%	4.3%
South Africa	1.9%	3.5%	3.8%	3.9%	4.0%	4.3%	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%
UAE	5.2%	4.3%	4.5%	4.6%	4.7%	4.7%	4.5%	4.3%	3.9%	3.6%	3.5%	3.4%	3.4%

Table 6.6: Real per capita GDP growth in selected countries in Middle East and Africa by country 2013- 2025 (%)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Algeria	0.8%	2.1%	2.1%	1.9%	2.3%	2.4%	2.4%	2.5%	2.3%	2.2%	2.6%	2.8%	2.6%
Egypt	0.2%	0.7%	0.7%	2.8%	2.8%	2.7%	2.7%	2.7%	2.7%	2.7%	2.7%	2.7%	2.7%
Iran	-7.0%	0.3%	0.3%	1.9%	2.0%	1.8%	1.9%	2.3%	2.5%	2.5%	2.6%	2.7%	2.8%
Iraq	1.6%	-0.9%	-0.9%	4.5%	4.1%	4.5%	4.4%	4.2%	4.1%	4.0%	3.9%	3.9%	3.8%
Morocco	3.3%	1.6%	1.6%	4.1%	4.0%	3.4%	2.8%	2.8%	2.6%	2.6%	2.4%	2.1%	2.0%
Nigeria	4.7%	4.2%	4.2%	5.3%	4.0%	3.7%	3.4%	3.2%	2.9%	2.6%	2.4%	2.2%	2.0%
Saudi Arabia	2.2%	2.8%	2.8%	3.2%	3.2%	3.0%	2.9%	3.0%	3.0%	2.9%	2.9%	3.0%	3.0%
South Africa	2.3%	4.0%	4.0%	3.8%	3.9%	4.2%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%
UAE	2.1%	1.4%	1.8%	2.0%	2.2%	2.3%	2.2%	2.1%	1.9%	1.7%	1.8%	1.9%	2.0%

Table 6.7: Population growth in selected countries in Middle East and Africa by country 2013- 2025 (%)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Algeria	1.9%	1.9%	1.9%	1.8%	1.8%	1.7%	1.6%	1.5%	1.5%	1.4%	1.3%	1.2%	1.2%
Egypt	1.9%	1.9%	1.9%	1.8%	1.7%	1.7%	1.7%	1.6%	1.6%	1.5%	1.5%	1.5%	1.4%
Iran	1.2%	1.2%	1.2%	1.2%	1.2%	1.1%	1.1%	1.0%	1.0%	0.9%	0.9%	0.8%	0.8%
Iraq	2.3%	2.3%	2.3%	2.2%	2.1%	2.1%	2.0%	2.0%	1.9%	1.9%	1.8%	1.8%	1.7%
Morocco	1.1%	1.0%	1.0%	1.0%	1.0%	1.0%	0.9%	0.9%	0.9%	0.9%	0.9%	0.8%	0.8%
Nigeria	2.5%	2.5%	2.5%	2.5%	2.5%	2.4%	2.4%	2.4%	2.4%	2.4%	2.4%	2.4%	2.4%
Saudi Arabia	1.5%	1.5%	1.5%	1.5%	1.5%	1.4%	1.4%	1.4%	1.4%	1.4%	1.3%	1.3%	1.3%
South Africa	-0.4%	-0.5%	-0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
UAE	3.0%	2.8%	2.7%	2.6%	2.4%	2.4%	2.3%	2.2%	2.0%	1.8%	1.7%	1.5%	1.4%

B.38- South Korea

South Korea	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Macroeconomic indicators													
Real GDP y/y growth (%)	3.0%	3.0%	4.0%	3.8%	3.5%	3.5%	3.2%	3.0%	2.9%	2.8%	2.7%	2.5%	2.6%
Real per capita GDP y/y growth (%)	2.8%	2.8%	3.9%	3.6%	3.4%	3.4%	3.1%	3.0%	2.9%	2.8%	2.7%	2.6%	2.7%
Population (Million)	48.96	49.04	49.12	49.18	49.24	49.29	49.33	49.36	49.39	49.40	49.41	49.40	49.37
Population y/y growth (%)	0.2%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
Flexible plastic packaging indicators													
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Flexible plastic demand (million tonnes)													
Y/y growth (%)													
Regional Share (%)													
Global Share (%)													
Demand per person (kg)													
Demand per person (gram)													

Commodity [Inside]
Analysis of commodities and end-users

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Why you should buy this report?

- A full coverage of the global flexible plastic packaging market in both volume and value terms
- Detailed demand projections of 50 national markets
- Demand projection are based on both qualitative and quantitative forecast models
- Analysis of 7 end use sectors
- Segmentation of demand by 6 material types
- 119 tables and charts
- List of national, regional and global companies in the flexible plastic packaging market
- Analysis are supported by macroeconomic forecasts
- Detailed country profiles showing various statistics such as macroeconomic indicators, per capita flexible plastic consumption, global and regional position etc
- Comprehensive statistical appendices and all supportive data in Excel

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