



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

Sample pages

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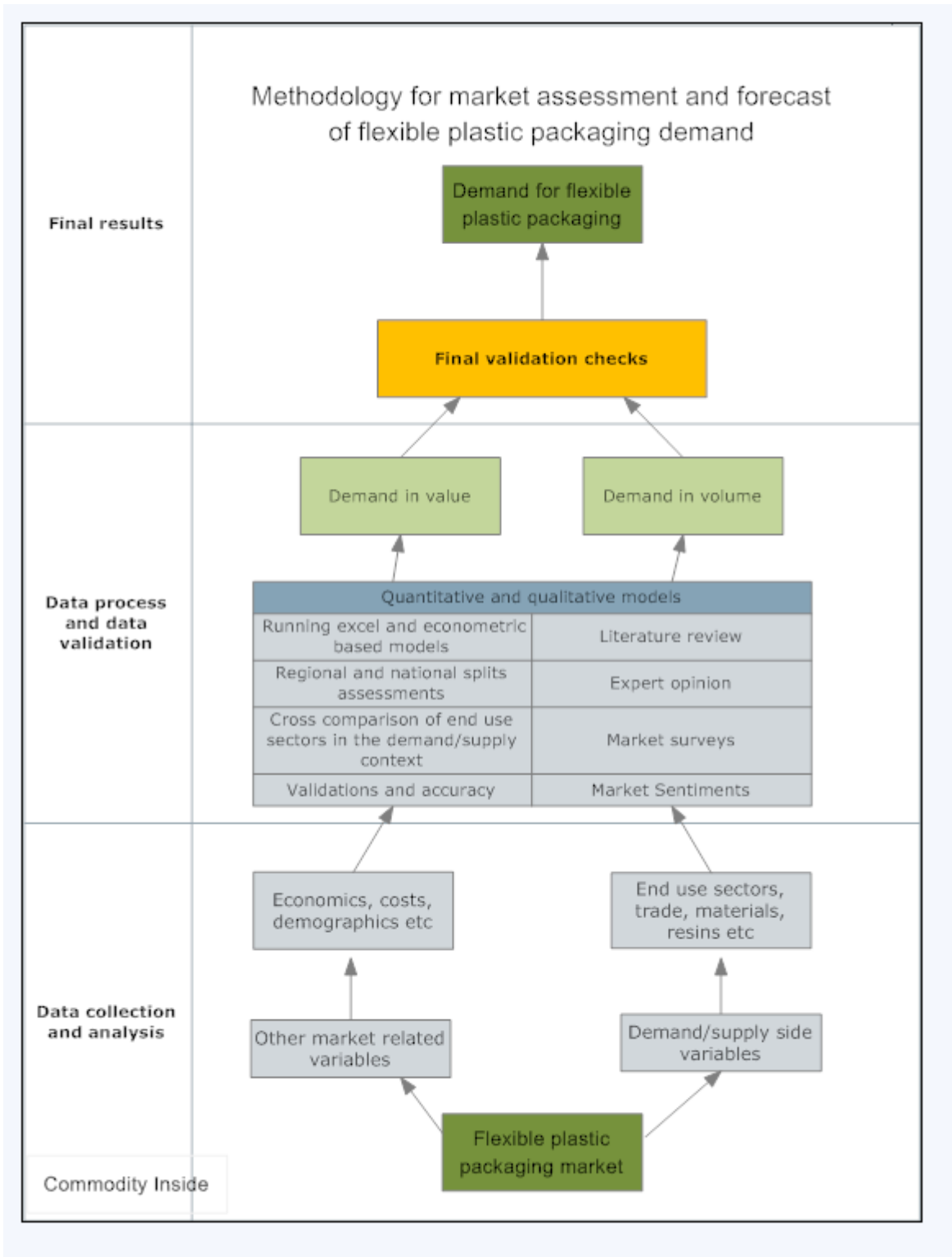
1.6 Methodology

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.

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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)

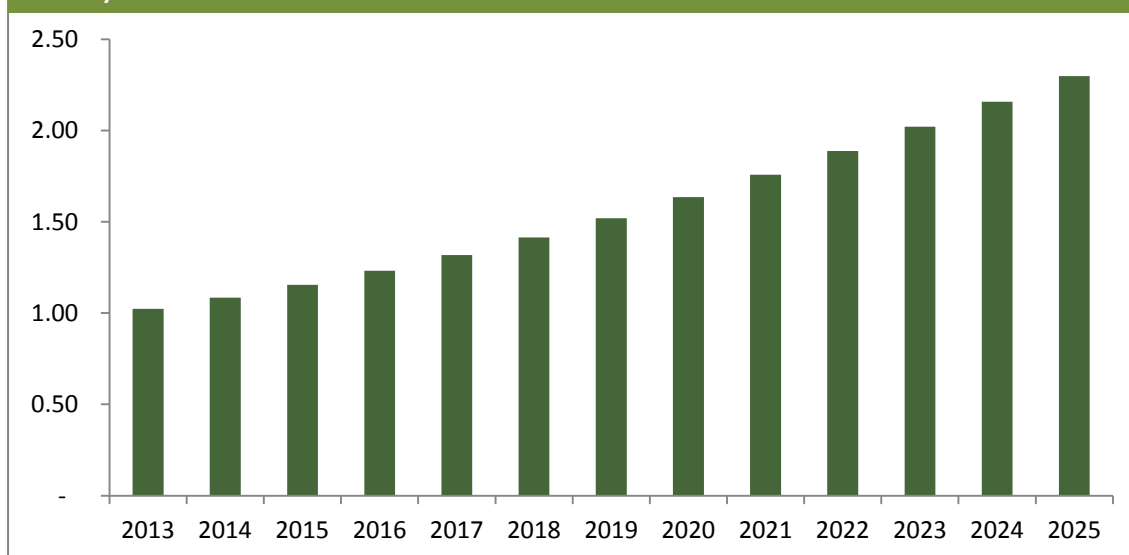
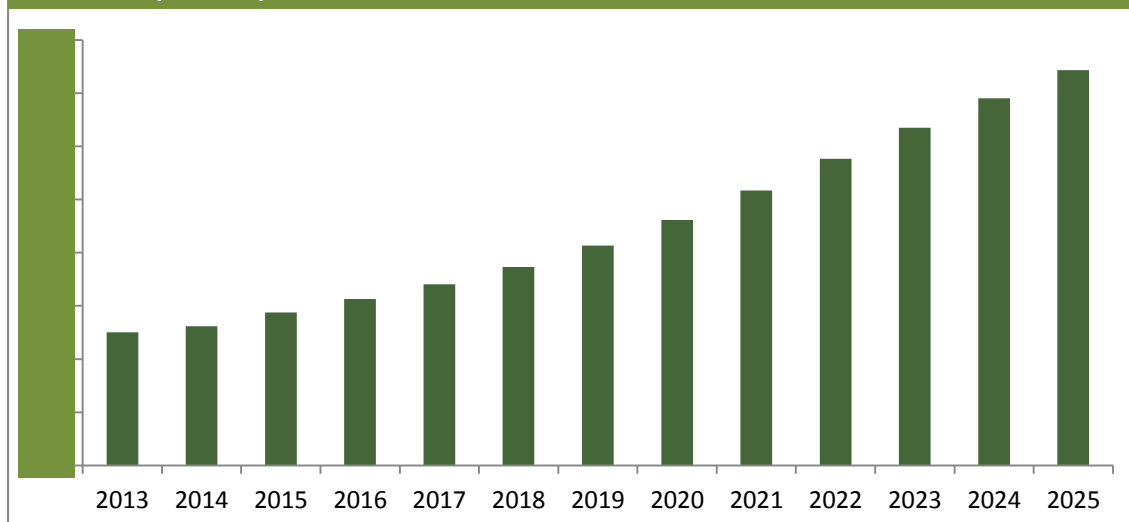
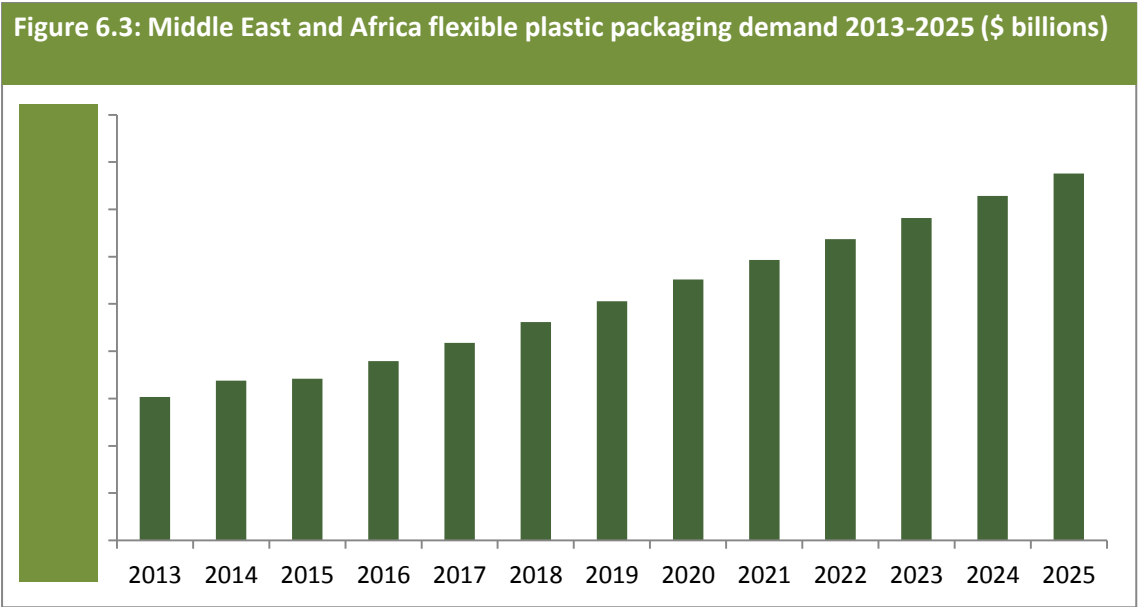


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| Table 6.2: Middle East and Africa flexible plastic packaging demand 2013-2025 (\$ billion, % change) | | | | | | | | | | | | | |
|--|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| Demand | | | | | | | | | | | | | |
| % Change | | | | | | | | | | | | | |



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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.

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6.2. Outlook

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|---|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 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 | | | | | | | | | | | | | |

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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% |

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

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) | | | | | | | | | | | | | |

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- 119 tables and charts
- List of national, regional and global companies in the flexible plastic packaging market
- Analysis are supported by macroeconomic forecasts
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