Saudi Arabia Plastic Packaging Market Analysis & Forecast

Strategic Growth, Trends, and Segment Forecast (2023-2030)



Tactics Leads

Presented by: Tactics leads

Market Executive Summary

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A USD 12.35 Billion Market Poised for 67% Growth by 2030

Key Metrics



CAGR: 6.6%

Core Drivers

- Growing consumption of bottled water
- Increasing pharmaceutical production
- Demand for halal-certified products

Material Segment Analysis

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PET Dominates Today; PP Emerges as Tomorrow's Growth Leader

PET
(Polyethylene Terephthalate)



Largest Segment:
33.99% Share (2022)

PP
(Polypropylene)



Highest Growth:
6.9% CAGR

PE
(Polyethylene)



Versatile:
Flexible & Rigid Applications

Specialty Materials



PS & PVC:
Niche Industrial Uses

Application Segment Analysis

Food & Beverage Leads with 30.22% Revenue Share; Pharma Emerges as High-Growth Opportunity

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Food & Beverage (Dominant)



30.22%

Revenue Share (2022)

Driven by bottled water & ready-to-eat meals.

Pharmaceutical & Healthcare (High Growth)



6.7% CAGR

(High Growth)

Largest pharma investment market in Middle East.

Personal & Household



36.6% CAGR

Driven by phama investment in Middle East.



Driven by construction, automotive & bulk chemicals.



Influenced by rising hygiene awareness.

Digital Transformation & E-Commerce Impact

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E-Commerce Acceleration Reshapes Packaging Demand: **8.6% CAGR for Food Delivery Containers**



E-Commerce Growth: Sustained demand for protective & branded solutions post-COVID.

Food Delivery Boom: Apps like Jahez & HungerStation drive 8.6% CAGR in food containers.

Direct-to-Consumer: Manufacturers bypassing middlemen via online portals.

Packaging Innovation: High demand for durability, branding, and sustainability features.

Regulatory Environment – SASO Standards Shape Market Dynamics

SASO Regulations Drive Innovation: Oxo-Biodegradable Mandates and Halal Compliance Create Competitive Advantages



Oxo-Biodegradability Mandate

Mandatory for plastics ≤ 250 microns. Must be oxo-biodegradable.



Licensing & Compliance

License required to use ‘biodegradable’ logo. Ensures quality & credibility.



Halal Certification

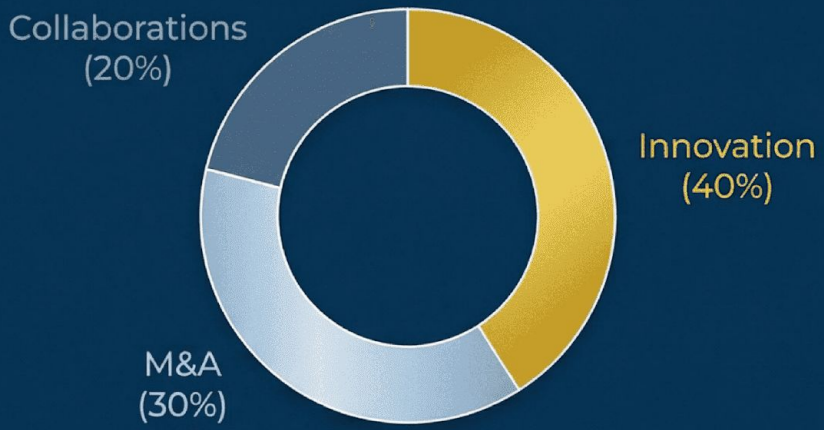
Strict adherence to GCC Halal standards for all food-related shipments.

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Competitive Landscape & Strategy

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Market Leaders Deploy Diversified Strategies: Innovation (40%), M&A (30%), and Partnerships (20%)



- Focus on sustainable materials, smart packaging, and AI-driven logistics solutions.
- Consolidating footprint, acquiring tech startups, and expanding into new regional markets.
- Joint ventures for R&D, cross-industry alliances, and supply chain resilience.

Sealed Air

National Plastic Factory

Obeikan Investment Group

Napco National

Challenges & Sustainability Imperatives

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Waste Management Crisis and Raw Material Volatility Create Both Risks and Opportunities

Waste Management Gap



Only 5% Recycled (2020-2021)

Urgent infrastructure needs.

Vision 2030 Investment



USD 6.4 Billion Investment by 2035

Strong government support for recycling infrastructure.

Raw Material Volatility



Dependence on Crude Oil Prices

Profit margin risks for manufacturers.

Sustainability Imperative



Shift to Bioplastics & Advanced Recycling

Regulatory mandates & consumer necessity.

Market Outlook & Strategic Recommendations

Sustainable Innovation and Bioplastics Development Represent the Next Growth Frontier

- **Growth Trajectory:** Acceleration via Vision 2030.
- **Bioplastics Opportunity:** High-value sustainable tech.
- **Strategic Imperative:** Innovation is mandatory.
- **Investment Thesis:** Advantage for green leaders.



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Key Takeaways & Action Items

Three Strategic Imperatives for Success

Regulatory Compliance First



SASO mandates & Halal certification are non-negotiable entry criteria

Sustainability Advantage



Invest in bioplastics & circular economy for premium market positioning

Digital-First Packaging



E-commerce & food delivery demand durable, branded solutions

Strategic Positioning: Regional Market Drivers

Why Saudi Arabia? Halal Certification, Demographics, and Retail Evolution



Halal-Certified Demand

Rising demand for halal food, cosmetics, and pharmaceuticals drives packaging innovation.



Demographics & Income

Increasing population and rising middle-class disposable income expands purchasing power.



Retail Transformation

Changing lifestyles favor packaged food and ready-to-eat meals.



E-commerce Acceleration

COVID-19 accelerated online shopping; platforms like Jahez drive food delivery demand.

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Your Company Logo

Thank You

Saudi Arabia’s Plastic Packaging Market: Where Regulation, Innovation, and Growth Converge

https://www.tacticsonline.com/insight

info@tacticsonline.com

+49 163 2053194