

GCC Polyethylene Terephthalate (PET) Market: Analysis By Demand, By Supply, By Application (Bottles, Films & Sheets, Household Containers and Other), By End User (Food & Beverage, Automotive, Electrical & Electronics, Healthcare, Consumer Goods and Other), By Region (Saudi Arabia, UAE, Qatar, Kuwait, Oman and Bahrain), Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

GCC PET supply is expected to reach 3.61 million ton by 2029, while GCC PET demand in 2023 stood at 2.20 million ton. GCC typically refers to the Gulf Cooperation Council, a political and economic alliance of six Middle Eastern countries—Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. In recent decades, the polymer industry in the GCC has witnessed substantial growth, driven by heightened international demand. This surge spans diverse sectors including packaging, construction, consumer goods, and automotive. Polyethylene Terephthalate (PET), formed by combining purified terephthalic acid (PTA) or dimethyl terephthalate with modified ethylene glycol, exhibits notable impact resistance and ensures food safety. Predominantly used in the food and beverage sector, PET resin serves widespread packaging needs. PET's applications include containers, thin films, and semi-rigid sheets for thermoforming.

GCC PET market demand is forecasted to grow at a CAGR of 5.30% over the projected period of 2024-2029. The demand for PET is influenced by the growing awareness of sustainability and environmental considerations. PET, with its lightweight and recyclable properties, aligns with the shift towards eco-friendly packaging solutions. The region's

strategic location and booming population provide an ideal backdrop for the PET market to thrive, mirroring the growth in the food industry. In addition to packaging, the textile industry plays a pivotal role in PET consumption, utilizing it for the production of polyester fibers in response to the region's expanding fashion and apparel sector. The PET market demand is expected to increase in the coming years due to its increasing use in automotive applications and increasing adoption of recycled PET (rPET).

GCC PET market supply is foreseen to grow significantly during the forecasted period. The region's polyethylene terephthalate (PET) supply is intricately influenced by various factors that collectively shape the production, distribution, and accessibility of PET products in the region. A pivotal factor is the availability and cost of raw materials, with purified terephthalic acid (PTA) and ethylene glycol being fundamental to PET production. Manufacturing capacities and technological advancements constitute another crucial aspect of the growth. The region has witnessed substantial investments in expanding PET production capabilities, and ongoing innovations in catalysts and polymerization techniques contribute to enhanced efficiency and reduced production costs.

Market Segmentation Analysis:

By Application: The GCC PET market by application can broadly be divided into four segments namely, Bottles, Films and Sheets, Household Containers and Others. The bottles segment accounted for the highest share in terms of both demand and supply. The demand for PET bottles is primarily driven by the region's growing population, urbanization, and a rising consumer preference for packaged beverages. The convenience and portability of PET bottles make them a preferred choice for soft drinks, water, juices, and other beverages. Simultaneously, the films and sheets segment is anticipated to exhibit the fastest CAGR during the forecasted period.

End User: In terms of application, the polyethylene terephthalate (PET) market can be divided into six segments namely, food and beverage, automotive, electrical and electronics, healthcare, consumer goods and other end-user industries. The food and beverage segment accounted for the highest share, in terms of both demand and supply, and is expected to maintain the dominance during the forecasted period also. The food and beverage industry's reliance on PET extends beyond its functional properties to include its cost-effectiveness and versatility. PET's transparency showcases the product within, contributing to enhanced shelf appeal. The material's ability to withstand the rigors of transportation and storage ensures product integrity,

meeting the stringent quality standards of the food and beverage sector. Additionally, the rising trend of on-the-go consumption has increased the demand for PET packaging, as it provides a lightweight and convenient solution for consumers.

By Region: The report provides insight into the GCC PET market based on the region, namely Saudi Arabia, UAE, Oman, Kuwait, Qatar and Bahrain. Saudi Arabia held the highest market share in terms of both, demand and supply in 2023. The Polyethylene Terephthalate (PET) industry in Saudi Arabia is not only the largest in the GCC nations but is also intricately tied to the overall growth of the petrochemical sector in the country. Saudi Arabia's PET market is significantly influenced by its position as the largest oil producer in the region, providing a robust foundation for the production of key raw materials like purified terephthalic acid (PTA) and monoethylene glycol (MEG), essential in PET manufacturing. The abundant access to these raw materials not only ensures a stable supply chain but also positions Saudi Arabia competitively in the GCC PET market. Saudi Arabia's Vision 2030 initiative, a comprehensive plan for economic diversification and development, has emerged as a catalyst for the growth of the petrochemical sector, including the PET industry. Qatar stands as a robust economic force in the Gulf region, primarily fueled by hydrocarbon revenues and a flourishing landscape in sports, tourism, and entertainment. The government's dedicated efforts towards economic diversification have not only improved business conditions but have also attracted significant private sector investments. With a population exhibiting a steady 1.0% Compound Annual Growth Rate (CAGR) from 2016 to 2021, coupled with a remarkable 95% surge in tourism activity post hosting the FIFA World Cup 2022, Qatar's economic vibrancy and increased disposable income have played a pivotal role in fostering a heightened demand for PET within the country.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors such as favorable demographics, GDP growth, rapid urbanization and modernization, upsurge in demand for plastic bags & sacks, rising demand for PET in food and beverage industry, growing demand of PET resin and increasing use of PET in automotive applications. The increasing utilization of PET in the production of plastic bags and sacks is notably driven by diverse applications across various industries, ranging from retail to agriculture. PET's versatility, durability, and cost-effectiveness make it an attractive choice for manufacturing lightweight and resilient plastic packaging solutions. The demand surge is further fueled by the material's recyclability, aligning with environmental concerns and sustainable practices. Additionally, the GCC's strategic geographical location and trade prominence enhance the region's position as a

hub for plastic bag and sack manufacturing, fostering both domestic consumption and export opportunities.

Challenges: However, some challenges are also impeding the growth of the market such as volatility in raw material prices and presence of substitutes. The presence of substitutes poses a significant challenge to the Polyethylene Terephthalate (PET) market in the GCC region. One notable substitute is bio-based and biodegradable polymers, which are gaining traction due to increasing environmental concerns. These alternatives, derived from renewable resources, offer eco-friendly characteristics that resonate with consumers and align with sustainability initiatives. For instance, Polylactic Acid (PLA), a biodegradable polymer derived from corn starch or sugarcane, competes with PET in packaging applications. PLA is compostable and reduces dependency on fossil fuels, addressing environmental issues associated with traditional plastics. The rising demand for substitutes like PLA has the potential to disrupt the traditional dominance of PET in packaging applications.

Trends: The market is projected to grow at a fast pace during the forecast period, due to increasing adoption of recycled PET, rising popularity of PET in the pipes and fittings industry, increasing demand for plastic films and technological advancements. The GCC Polyethylene Terephthalate (PET) market is witnessing a notable trend with the increasing demand for plastic films. This surge in demand is propelled by various factors, such as the versatile applications of plastic films across industries like textiles, pharmaceuticals, and electronics. The adoption of plastic films in these sectors is driven by their lightweight nature, durability, and cost-effectiveness. Moreover, the emphasis on sustainable packaging solutions and advancements in PET film technology are anticipated to shape the market's future.

Impact Analysis of COVID-19 and Way Forward:

The GCC polyethylene terephthalate (PET) market underwent significant shifts due to the COVID-19 pandemic, presenting a blend of challenges and opportunities. The disruption in the GCC supply chain and economic slowdown directly impacted PET production and demand in the region, leading to temporary closures and logistical hurdles. Nonetheless, the crisis highlighted PET's crucial role in essential sectors like pharmaceuticals and food packaging, driving increased demand. Additionally, the focus on single-use plastics for health and safety during the pandemic mitigated some challenges, altering consumption patterns.

As various industries recover from the impacts of the pandemic, there is likely to be an

uptick in demand for PET, especially in sectors such as packaging, textiles, and electronics. The GCC shift towards sustainable and eco-friendly packaging solutions presents an opportunity for the PET market. Companies are likely to invest in technologies that enhance PET's recyclability and reduce its environmental footprint.

Competitive Landscape:

The GCC Polyethylene Terephthalate (PET) market is characterized by a moderately concentrated landscape with several established players vying for market share. Leading contenders include SABIC, Alpek, Dow Chemical Company and JBF RAK. These companies boast large production capacities, diverse product portfolios, and strong regional distribution networks. They compete on factors like product quality, pricing, sustainability initiatives, and customer service. International players from Asia and Europe are likely to increasingly make inroads, attracted by the region's growing demand and strategic location. This rising competition keeps the market dynamic and drives innovation in product offerings and production processes. The key players of the GCC PET market are:

SABIC

The Dow Chemical Company

ALPEK S.A.B. de C.V. (Octal)

JBF RAK LLC

Consolidation is expected to be a key trend, with mergers and acquisitions potentially reshaping the competitive landscape. Furthermore, sustainability will be a crucial differentiator, with players focusing on increasing recycled content, developing bio-based PET, and adopting circular economy practices. Navigating this dynamic environment effectively will be key for companies to secure their positions in the ever-evolving GCC PET market.

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