

Middle East Flexible Packaging Market Size, Share & Trends Analysis Report By Material (Plastics, Paper, Metal, Bioplastics), By Product (Bags, Pouches, Rollstock, Films & Wraps), By Application, By Country, And Segment Forecasts, 2025 - 2033

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Abstracts

Middle East Flexible Packaging Market Summary

The Middle East flexible packaging market size was estimated at USD 7.36 billion in 2024 and is expected to reach USD 11.28 billion by 2033 and expand at a CAGR of 5.0% from 2025 to 2033. The market is driven by the rising demand for packaged food and beverages, supported by urbanization and changing consumer lifestyles.

In addition, growth in e-commerce, retail expansion, and increasing preference for sustainable, lightweight packaging solutions are fueling market adoption. The market is largely driven by the growth of the food and beverage (F&B) sector, which accounts for a significant share of packaging demand. With increasing urbanization, busy lifestyles, and a young population, there is growing consumption of ready-to-eat meals, snacks, and beverages that require convenient, lightweight, and cost-effective packaging solutions. For instance, the rising popularity of packaged dairy products in Saudi Arabia and the UAE, as well as the expansion of quick service restaurants (QSRs) across the Gulf Cooperation Council (GCC), is creating robust demand for pouches, films, and wraps. Flexible packaging offers longer shelf life, protection from contamination, and reduced transportation costs, making it ideal for the rapidly expanding processed food segment.

Sustainability has become a major driving factor, as regional governments and multinational FMCG brands are focusing on reducing plastic waste. Countries such as

the UAE and Saudi Arabia have introduced restrictions on single-use plastics, pushing the packaging industry to adopt recyclable and bio-based materials. Flexible packaging formats such as mono-material films and recyclable polyethylene pouches are gaining traction as they align with the circular economy goals. For example, Unilever and Nestlé have launched recyclable flexible packaging for their food products in the region, catering to eco-conscious consumers. This sustainability push not only encourages innovation but also provides long-term growth opportunities for packaging converters.

The rapid expansion of e-commerce and modern retail channels in the Middle East is fueling demand for durable and lightweight flexible packaging. Online shopping requires packaging that is cost-effective, tamper-evident, and capable of protecting products during transit. Flexible solutions such as mailer bags, stretch films, and resealable pouches are increasingly used by retailers and logistics providers. In addition, large-scale retail infrastructure developments, such as Carrefour and Lulu Group's expansion in the UAE, Qatar, and Saudi Arabia, are boosting demand for packaged goods, thereby driving the need for efficient and attractive packaging solutions. Flexible packaging also offers better branding opportunities through high-quality printing, which appeals to regional consumers who prioritize aesthetics and product safety.

Cost competitiveness is another major driver of flexible packaging adoption in the Middle East. Compared to rigid packaging formats like glass and metal, flexible packaging uses fewer raw materials, reduces storage space, and lowers transportation costs. This makes it an attractive option for both local manufacturers and multinational players. In addition, technological advancements such as digital printing, barrier films, and smart packaging are enhancing product safety and shelf appeal. For instance, multilayer barrier films are widely used in packaging snacks, coffee, and pharmaceuticals in GCC countries, ensuring freshness in the region's hot climate. The adoption of advanced printing technologies also allows companies to cater to short-run packaging demands and promotional campaigns, further stimulating market growth.

Middle East Flexible Packaging Market Segmentation

This report forecasts revenue growth at a regional level and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the Middle East flexible packaging market report based on material, product, application, and country:

Material Outlook (Revenue, USD Million 2021 - 2033)

Plastics

Polyethylene (PE)

Polypropylene (PP)

Polyamide (PA)

Polyvinyl Chloride (PVC)

Polystyrene (PS)

Others

Paper

Metal

Bioplastics

Product Outlook (Revenue, USD Million 2021 - 2033)

Bags

Pouches

Retort Pouches

Refill Pouches

Rollstock

Films & Wraps

Others

Application Outlook (Revenue, USD Million 2021 - 2033)

Food

Beverages

Pharmaceutical & Healthcare

Personal Care & Cosmetics

Others

Country Outlook (Revenue, USD Million 2021 - 2033)

UAE

Saudi Arabia

Oman

Kuwait

Qatar

Bahrain

Israel

Turkey

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