

MEA Medical Devices Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The MEA Medical Devices Packaging Market size is estimated at USD 1.89 billion in 2024, and is expected to reach USD 2.35 billion by 2029, growing at a CAGR of 4.47% during the forecast period (2024-2029).

The surge in demand for medical devices drives the need for protective packaging. The Middle East and Africa made considerable progress in developing healthcare systems and the improvement of health outcomes among their populations over the past few decades.

Key Highlights

The Middle East and Africa healthcare industry is seeing increased demand for sterile medical packaging. Plastics, paper, and paperboard have several advantages, including recyclability, low weight, and durability. Medical device packaging plays an essential role in safeguarding the safety and effectiveness of medical devices. Packaging protects devices from harm, contamination, and manipulation during transport and storage and conveys critical data to healthcare providers and patients.

Pouch packaging has been demonstrated to be an effective method of packaging medical devices. Not only are pouches lightweight, portable, and convenient to store, but they also contribute to product sterility, protection, and safety maintenance. The design, materials, and barrier protection can be tailored to the specific application to maximize the benefits of medical pouch packaging. Furthermore, rising applications in the unit-of-use packaging of small to medium-sized medical devices, appliances, and supplies will likely drive increased demand for pouches. Pouch packaging demand is

projected to be influenced by the growing usage of diagnostic test packs, prefilled inhalers, and surgical and dental trays in secondary packaging.

Diabetes has been identified as the seventh leading cause of death globally and in the region. In addition, diabetes is a significant cause of disability and is associated with an increased risk of blindness, cardiovascular disease, lower limb amputation, and kidney failure. According to the International Diabetes Federation, Africa, the Middle East, and North Africa will have the highest increase in the number of people with diabetes worldwide between 2021 and 2045 (134%). These incidents have increased the demand for sterile packaging as these medicines have a high risk of contamination, boosting the demand for sterile medical device packaging.

Additionally, the Saudi government is investing heavily in developing the healthcare sector, which is expected to boost the healthcare market. The government is focusing on improving the quality of healthcare services, implementing advanced healthcare technologies, and increasing the number of hospitals and healthcare centers. The Saudi FDA is responsible for registering, evaluating, and approving drugs and medical devices in the country. This will ultimately impact on the growth of the target market.

However, the Saudi Standardization, Metrology, and Quality Organization (SASO) issued new regulations for plastic items in Saudi Arabia. The plastic must be OXO-biodegradable, and all plastic goods entering the nation must be registered with and certified by SASO for use in commercial or industrial settings. So, it is anticipated that various government laws will impede the development of medical device plastic packaging in the country.

MEA Medical Devices Packaging Market Trends

Increasing Demand for Sterile Packaging

Sterilization is an important processing step in the medical device industry. Therefore, using sterile packaging products or barrier systems is becoming increasingly important in the industry. Sterile medical packaging is non-reusable and acts as a barrier against microbial infection. Using plastic and paper offers lightweight, recyclability, and durability advantages.

The medical device industry is experiencing a growing need for packaging to safeguard products from environmental factors like moisture while in transit. Additionally, the rising investments in packaging technologies, including advanced equipment to enhance

efficiency, are driving the demand for packaging solutions that guarantee the integrity and sterility of medical devices and pharmaceuticals.

The pandemic has created avenues and advanced the creation of sterile and anti-microbial packaging options. The surge in demand for sterile medical packaging to prevent transmission was hastened by the pandemic. The rise in infectious diseases and viruses has resulted in a higher need for sterile medical packaging to avoid contamination, contributing to market growth.

Stringent government regulations for surgical and medical appliance packaging to prioritize patient safety boost the demand for sterile packaging for this segment. Sterile packaging is crucial for surgical and medical appliances to protect patients and prevent transmission of germs or diseases during surgical procedures. According to data from the National Institute of Health, 1.7 million cases were caused by medical device-associated infection in 2023, which enhanced the demand for sterile packaging for medical appliances globally.

The government focuses on improving the quality of healthcare services and has strategic plans to increase investment in the healthcare sector. The increasing demand for medicine-related products and medical devices has created a greater need for aseptic and sterile packaging. These packaging solutions are essential for the safe storage and transit of devices, as they help to reduce the risk of contamination. The region continues to invest in the healthcare sector, thus fueling the demand for medical device packaging in the projected timeframe.

Additionally, according to the United Nations Department of Social and Economic Affairs, countries in the region will experience growth in the elderly population. The percentage of the population 65+ in Saudi Arabia will account for 15.1% by 2050, and in Tunisia and the United Arab Emirates, the elderly population will account for 21.4% and 28% by 2050. Such growth of the elderly population will propel the growth of medical care, eventually impacting the market growth.

Saudi Arabia is Expected to Register Significant Growth with the Increasing Production of Medical Devices

The government in the country is planning to reduce the reliance on oil and gas revenues and develop other sectors to generate income, such as manufacturing and

tourism. The Saudi Vision 2030 was initiated with the same vision of developing other sectors in the country. One of the initiatives of Saudi Vision 2030 includes enhancing the healthcare sector to advance patient care in the country.

Additionally, the government focuses on localization by offering additional incentives such as customs duty exemption and deferred income tax for up to 10 years on raw materials, equipment, spare parts, and low water and electricity rates. It also offers an enhanced supply chain with opportunities to distribute and sell healthcare products within the country.

The Ministry of Investment of Saudi Arabia (MISA) has identified two areas with high investment potential: pharmaceutical and medical devices. The Ministry of Investment of Saudi Arabia (MISA) noted that around 90% of the medical devices in the country are imported. Supporting local manufacturing would help the country reduce its dependence on foreign companies. This is expected to significantly impact the growth of medical device packaging manufacturers in the country.

Medical device manufacturers are seeking to operate in Saudi Arabia to take advantage of the opportunities offered by the government in the country. For instance, in 2024, J&J MedTech KSA, a Johnson & Johnson Company technology firm, announced the launch of direct operations in Saudi Arabia. The company offers medical and surgical equipment, and its direct operation in the country helps contribute to Vision 2030 to support the development of the healthcare sector.

According to the International Trade Administration, Saudi Arabia accounts for around 60% of the Gulf Cooperation Council (GCC) countries' healthcare expenditure. In 2023, healthcare and social development spending accounts for approximately USD 50.4 billion compared to the previous year. Moreover, the medical device market in Saudi Arabia is growing at 10% annually. The strong growth in the medical device sector, with rising healthcare concerns among the Saudi population and increasing consumption of healthcare services, is anticipated to aid the development of the medical device packaging market.

MEA Medical Devices Packaging Industry Overview

The Middle East and Africa medical devices packaging market is moderately fragmented. Some of the major players in the market are Amcor Group GmbH, Sonoco

Products Company, DS Smith PLC, Wipak Group, Constantia Flexibles GmbH, and WestRock Company. The players are focusing on expanding their presence and product portfolio in the region to gain an advantage of the market opportunities.

November 2023- Amcor Group GmbH launched a new mono-material polyethylene (PE) laminate. The new mono-material laminate is designed to support various packaging formats. It can replace non-recyclable lidding in 3D thermoplastic packages, commonly used in drapes and protective materials, catheters and injection systems, and tubing. It also suits 2D pouch applications for wound care materials and gloves.

June 2023 - Rose Plastic Medical Packaging GmbH announced the launch of DentallmplantPack, a plastic tube container for delicate dental implants. The new plastic tube container for the dental implant offers easy handling during surgery and safety during transport so that the product reaches the customer intact.

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