

Middle East And Africa Aseptic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

<https://marketpublishers.com/r/M606EB016973EN.html>

Date: July 2024

Pages: 102

Price: US\$ 4,750.00 (Single User License)

ID: M606EB016973EN

Abstracts

The Middle East And Africa Aseptic Packaging Market size is estimated at USD 4.06 billion in 2024, and is expected to reach USD 6.26 billion by 2029, growing at a CAGR of 9.03% during the forecast period (2024-2029).

Key Highlights

The main growth drivers in the aseptic packaging market are the packaging material's ability to meet the demands for high, consistent product quality and nutrient retention. Also, the capacity to avoid the bisphenol A (BPA) controversy is frequently found in other packaging types, such as can liners. Aseptic packaging has met all these requirements and extends the shelf life of some products by an estimated six to twelve months without refrigeration.

Rapid urbanization and the variety of consumer goods are key factors promoting the development of aseptic packaging. The rising demand for processed foods and disposable medical supplies also drives the adoption of aseptic packaging in the region.

The altering lifestyles of people have resulted in the shift from home-cooked to ready-to-eat products. These lifestyle changes and consumers' consequent dependence on processed, packaged, and pre-cooked food are increasing the demand for aseptic carton packaging solutions. The advent of supermarket culture has also altered the shopping landscape and increased the need for packaging, especially in food and beverage products.

Aseptic packaging reduces the need to add preservatives to the product, which is

gaining attention among consumers who are focusing on natural and no-preservative products. Also, aseptic packaging helps reduce shipping and distribution costs by eliminating the need for refrigerated, more relaxed environments during shipping and distribution.

The regional aseptic packaging market is in its early stages. However, increasing concerns regarding health and product shelf life are some of the major factors affecting its growth in the region.

Middle East And Africa Aseptic Packaging Market Trends

Increasing Adoption of Aseptic Carton Packaging to Increase the Shelf-life of Products

Consumers have been demanding products with a longer shelf life and more efficient usage. This has necessitated the companies to devise alternative packaging solutions to traditional packaging. With companies seeking to expand their product offerings with less dependence on sophisticated cold storage chains, producing packages that provide longer shelf life has become crucial.

Protecting products from potential deteriorating agents, such as oxygen, moisture, and microbes, can increase shelf life. Companies need a cost-effective packaging solution to achieve the same. Reducing wastage throughout the food supply chain is likely a crucial activity to reduce the environmental impact of agriculture and serve the increasing food demand. Investing in efficient, low-cost, and sustainable processing and packaging solutions to increase product shelf life is a viable solution, thus increasing the demand for aseptic carton packaging.

Food packaging is no longer just a passive role in protecting and marketing a food product. The emphasis on decreasing preservatives is also a driving factor for aseptic packaging, as aseptic food preservation methods enable processed food to be kept longer without preservatives until the carton is opened.

The dairy industry is expected to prosper as Africa's growing wealth translates to evolving diets. The IFCN Dairy Research Network estimates intake will increase by more than a third by 2030, in which time imports of cheese and butter are expected to more than double to meet that demand. Furthermore, global giants like Unilever, Nestlé, and Diageo are all running massive operations across Africa as they seek to capitalize on surging population growth, a rising middle class, and increasing urbanization in cities such as Lagos, Cairo, and Johannesburg.

According to the General Authority for Statistics, the revenue of the food and beverage service activities market in Saudi Arabia was worth about USD 14.46 billion in 2020. This amount is anticipated to reach around USD 16.03 billion in 2025. This growth indicates a potential surge in the consumption of packaged foods and beverages, which can positively impact aseptic carton packaging.

The Pharmaceutical and Medical Segment is Expected to Witness Significant Growth During the Forecast Period

Prefillable syringes overcome the disadvantages of parenteral drug delivery, such as lack of convenience, affordability, accuracy, sterility, and safety. These syringes enable easy management of chronic diseases, such as diabetes and rheumatoid arthritis, thereby increasing the use of auto-injectors and pen injectors over the forecast period. The growing prevalence of diabetes and other chronic diseases in the Middle East and Africa is expected to lead to market demand over the forecast period.

Prefilled syringes are emerging as one of the fastest-growing choices for unit-dose medication as the pharmaceutical industry seeks new and more convenient drug delivery methods. Also, pharmaceutical companies minimize drug waste and increase product life span, while patients can self-administer injectable drugs in their homes instead of the hospital.

Around 80% of the vials and ampoules are made from glass, owing to their suitability with varied drug combinations, but they face challenges like delamination, breakage, etc. Alternative plastic vials, like cyclic olefin polymer (COP) and cyclic olefin copolymer (COC) formats, are expected to gain significant market share over the next five years. Major players such as Schott AG and Amcor Group GmbH possess expertise in COC for pharmaceutical applications. Such developments are driving the need for aseptic packaging in the region.

Furthermore, according to the International Diabetes Federation in the Middle East and North Africa, in 2021, around 73 million people (20-79) had diabetes, and it is projected that 136 million adults will have diabetes by 2045. People with diabetes are expected to grow by 134% in Africa among those aged 20 to 79 between 2021 and 2045. At the same time, there is projected to be an 87% surge across the Middle East and Africa. Thus, the growing insulin industry is expected to drive the prefillable syringes market,

which would further aid the development of the aseptic packaging market.

Middle East And Africa Aseptic Packaging Industry Overview

The Middle East and Africa aseptic packaging market is semi-consolidated, as a few domestic and international vendors operate in the market. Some of the major players in the market include Tetra Pak International SA, Amcor Group GmbH, SIG Group AG, Mondi PLC, Nampak Ltd, Greatview Aseptic Packaging Company, and International Aseptic Paperboard Mfg LLC. Players are adopting various strategies, such as product innovation, mergers, and acquisitions, primarily to expand their reach and stay competitive.

In November 2023, SIG Group AG, a leading systems and solutions provider for aseptic packaging, announced the launch of filling machines for F&B leaders and startups in the United Arab Emirates. The SIG SmileSmall 24 Aseptic and SIG CleanPouch 25 Aseptic filling machines are available in SIG's Technology Center at Dubai Silicon Oasis. They offer F&B innovators various benefits and possibilities for product testing and innovation, performance, volume flexibility, and SIG's Drinksplus capability.

In November 2023, Tetra Pak International SA launched the Tetra Brik 200 Slim Leaf aseptic carton, which contains paper-based barriers, in collaboration with food products producer Lactogal. To increase the use of renewable content in the packaging to 90%, the carton is made from approximately 80% paperboard.

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Contents

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Value Chain Analysis
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Bargaining Power of Suppliers
 - 4.3.2 Bargaining Power of Consumers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Technology Snapshot
- 4.5 Assessment of the Geopolitical Scenario's Impact on the Industry

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Demand to Reduce Cost of Cold Chain Logistics
 - 5.1.2 Surge in Need for Longer Shelf Life of Products
- 5.2 Market Challenges
 - 5.2.1 Concerns over Environment Problems and Recycling
 - 5.2.2 Manufacturing Complications (For Example Increasing Cost of Raw Materials) and Lower ROI

6 MARKET SEGMENTATION

- 6.1 By Packaging Material
 - 6.1.1 Metal
 - 6.1.2 Glass

- 6.1.3 Paper & Paperboard
- 6.1.4 Plastics
- 6.1.5 Other Packaging Material
- 6.2 By Packaging Type
 - 6.2.1 Cartons
 - 6.2.2 Bags and Pouches
 - 6.2.3 Cups and Trays
 - 6.2.4 Bottles and Jars
 - 6.2.5 Cans
 - 6.2.6 Other Packaging Type
- 6.3 By End-User Industry
 - 6.3.1 Food
 - 6.3.2 Beverage
 - 6.3.3 Pharmaceutical and Medical
 - 6.3.4 Other End-User Industries
- 6.4 By Country***
 - 6.4.1 Saudi Arabia
 - 6.4.2 South Africa
 - 6.4.3 United Arab Emirates

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles*
 - 7.1.1 Tetra Pak International SA
 - 7.1.2 Amcor Group GmbH
 - 7.1.3 Nampak Ltd
 - 7.1.4 DS Smith PLC
 - 7.1.5 SIG Group AG
 - 7.1.6 Uflex Limited
 - 7.1.7 Mondi PLC
 - 7.1.8 Greatview Aseptic Packaging Company
 - 7.1.9 International Aseptic Paperboard Mfg. LLC
 - 7.1.10 Smurfit Kappa Group PLC

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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