RENIN RESEARCH

PRINTING ● PACKAGING

Gulf Print & Packaging Industry Outlook 2027

Strategic market intelligence for international manufacturers, converters, and brand-owner supply chains evaluating entry and expansion across the GCC printing and packaging sector.

JULY 2026 · STRATEGIC BRIEFING · RENIN RESEARCH

Report Roadmap

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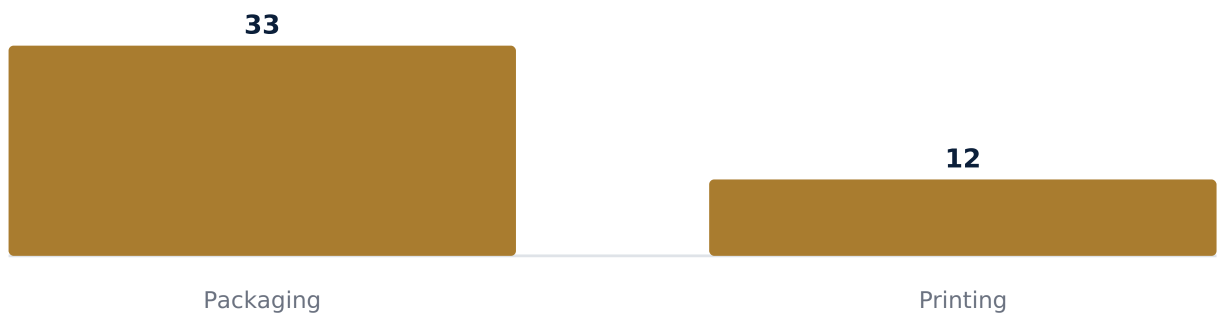
The Gulf Print & Packaging Opportunity at a Glance

$45B	**6.8%**	**73%**	**4**
COMBINED PACKAGING & PRINTING MARKET SIZE, 2027E	BLENDED CAGR, 2024–2027E	PACKAGING SHARE OF COMBINED TOTAL	INVESTMENT HOTSPOTS MAPPED ACROSS THE GCC

2027E Market Size by Segment (US$ Bn)



Key Takeaways

- Packaging is the faster-growing of the two segments, expanding at roughly 7.8% CAGR on e-commerce and F&B demand.
- Printing is the smaller, most localization-sensitive segment, tied closely to Nitaqat and ICV compliance rules, growing at roughly 3.9% CAGR.
- Flexible, sustainable packaging formats are winning share fastest from rigid legacy packaging.
- The durable printing opportunity is specialty label and packaging print, where converters are consolidating with packaging players.

Key Opportunities & Biggest Risks

Key Opportunities

- Vision 2030 and Operation 300bn are driving structural import substitution in packaging materials and printed components.
- Giga-projects (NEOM, Red Sea, Diriyah) create sustained demand for specialty and premium packaging.
- IKTVA and ICV scoring reward local value-add — first-movers lock in preferred-supplier status.
- Circular economy mandates (Saudi Green Initiative, UAE Net Zero 2050) open recycled-substrate and sustainable-ink niches.

Biggest Risks

- Chinese and South/East Asian low-cost imports pressure pricing in commodity packaging and printed materials.
- Localization compliance (Nitaqat, ICV) raises entry cost and timeline for new entrants.
- Fragmented regulatory regimes across GCC states slow multi-country rollouts.
- Talent scarcity in specialized converting and printing technicians constrains scale-up speed.
- Digital substitution continues to shrink standalone commercial print demand.

RENIN INSIGHT

Packaging and printing are converging commercially: brand owners increasingly award both to a single qualified converter group, so suppliers who can offer packaging plus on-pack print and labeling under one qualification file are winning larger, stickier contracts than single-discipline specialists.

Investment Hotspots & Entry Recommendations

JY

Jubail & Yanbu, KSA

Integrated petrochemical-adjacent plastics & packaging conversion clusters.

KZ

KIZAD, UAE

Downstream packaging & industrial free zone with ICV incentives.

NM

NEOM & Red Sea, KSA

Greenfield demand for specialty and premium packaging formats.

SD

Sohar & Duqm, Oman

Emerging low-cost export platform for packaging conversion.

Entry Recommendations

- Prioritize Saudi Arabia for scale, and the UAE for speed-to-market and regional re-export.
- Enter via joint venture or local agent to satisfy IKTVA/ICV scoring from day one.
- Sequence market entry: UAE pilot (0–12mo) → Saudi scale-up (12–24mo) → Oman/Qatar (24–36mo).
- Target Approved Vendor status with major FMCG and food & beverage brand owners — or Aramco-linked industrial packaging tenders — before committing to capex.

01

SECTION 01

The Print & Pack Ecosystem

How printing and packaging interlock with upstream feedstock and polymer supply across the Gulf value chain.

VALUE CHAIN DIAGRAM

ECOSYSTEM MAP

MARKET RELATIONSHIPS

CROSS-SECTOR DEPENDENCIES

The Packaging & Printing Value Chain

UPSTREAM & MIDSTREAM
Feedstock & Polymers
Ethane, PE, PP, PET (Aramco, SABIC, Boroug

▶

CONVERSION
Packaging
Rigid & flexible packaging, F&B, industrial

▶

END-MARKET
Printing
Labeling, cartons, commercial & commu

RENIN INSIGHT

Packaging and printing sit at the end of the Gulf's integrated feedstock chain: preferential polymer and substrate pricing upstream is exactly why regional packaging converters and label printers can undercut Asian imports once local supply agreements are secured.

Why This Matters for Entrants

- Feedstock-advantaged pricing flows downstream — packaging converters located near Jubail, Yanbu, or KIZAD capture a real, structural cost advantage over imported competitors.
- Printing sits furthest from the feedstock advantage and closest to the end customer, which is why localization (Nitaqat/ICV) and customer proximity matter more than raw material cost in that segment.
- The two segments are increasingly integrated commercially — packaging converters and label/print houses are consolidating to offer brand owners a single qualified supply relationship.

Industry Ecosystem & Cross-Sector Dependencies

REGULATORS & PIF PROGRAMS

Vision 2030 · IKTVA · ICV · Nitaqat

National Oil Companies

Aramco · ADNOC · QatarEnergy — upstream feedstock

Petrochemical Majors

SABIC · Borouge · EQUATE — polymer & resin supply

Packaging Brands

Napco · Hotpack · Falcon Pack

Print & Label Houses

Commercial & industrial printers, label converters

RENIN INSIGHT

Every layer of the packaging and printing value chain is anchored back to national vision programs and localization scoring — regulators and PIF programs sit at the center of the ecosystem, shaping procurement across every stakeholder group above.

02

SECTION 02

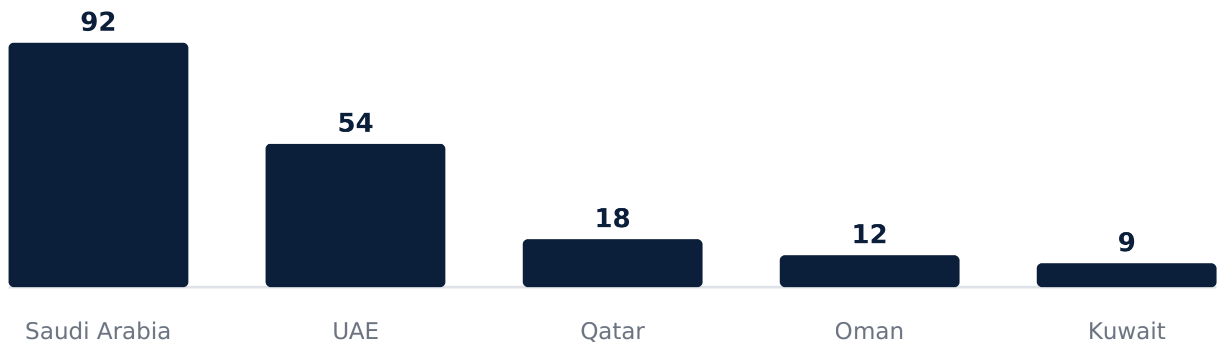
GCC Macro Outlook

Comparing Saudi Arabia, UAE, Qatar, Oman and Kuwait on the drivers that shape packaging & printing demand.

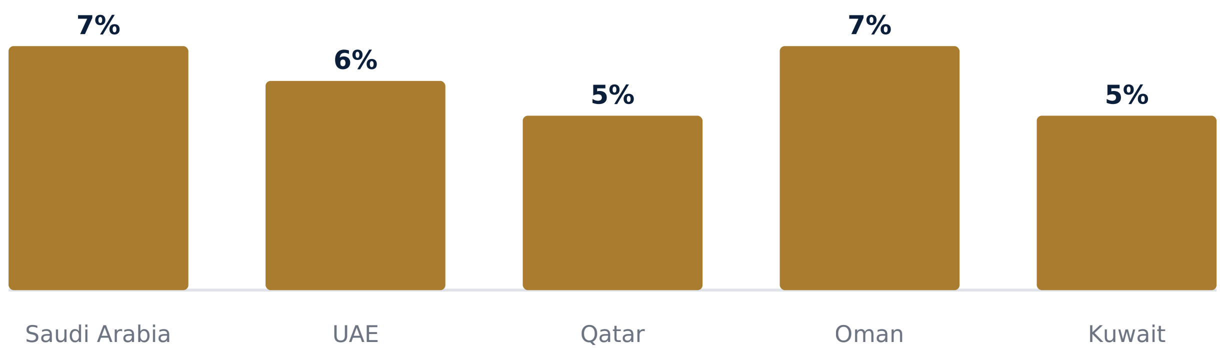
GDP & MANUFACTURING | VISION PROGRAMS | LOCALIZATION RULES | INDUSTRIAL SPEND & PROCUREMENT

Country Comparison: Scale & Growth

Manufacturing GDP, 2027E (US$ Bn)



Packaging & Printing-Linked Sector CAGR, 2024–27E (%)



Sector CAGR is directional, blended across the broader downstream-conversion base each market is building; see Appendix for methodology notes.

Policy Backbone by Market

Market	Vision Program	Localization Lever	Procurement Driver
Saudi Arabia	Vision 2030	IKTVA / Nitaqat	Aramco / SABIC vendor lists
UAE	Operation 300bn	In-Country Value (ICV)	ADNOC / ADQ ecosystem
Qatar	Qatar National Vision 2030	Tawteen	QatarEnergy supply chain
Oman	Oman Vision 2040	In-Country Value	OQ / Duqm free zone
Kuwait	New Kuwait 2035	Kuwaitization	KIPIC / KNPC tenders

RENIN INSIGHT

Saudi Arabia and the UAE together account for the large majority of GCC packaging and printing demand — but Oman and Qatar offer lower-friction entry points for converters seeking a lower-cost pilot footprint before committing to Saudi-scale investment.

03

SECTION 03

Saudi Arabia Deep Dive

Vision 2030, IKTVA, and the industrial cities anchoring the Kingdom's packaging & printing economy.

VISION 2030 / IKTVA / NITAQAT

JUBAIL · YANBU · NEOM · MODON

INVESTMENT MAP

OPPORTUNITY HEAT MAP

Policy Backbone: Vision 2030, IKTVA & Nitaqat

V

Vision 2030

National transformation program targeting a diversified, non-oil economy — industrial GDP contribution is a headline KPI.

IK

IKTVA

Aramco's In-Kingdom Total Value Add program scores suppliers on local spend, job creation and R&D — directly gates access to Aramco-linked packaging tenders.

N

Nitaqat

Saudization quota system classifying firms by Saudi-national employment share, affecting visas, licensing speed and government contracts.

RENIN INSIGHT

Treat IKTVA not as a compliance cost but as a market-entry accelerant — suppliers who reach 40%+ local content typically cut Aramco vendor-approval timelines by a third.

KEY TAKEAWAYS

- IKTVA scores are the single biggest lever for Aramco-linked packaging contracts — target 40%+ local value add.
- Nitaqat Platinum status unlocks fast-track visas and preferential government tendering.
- Foreign entrants typically need a Saudi JV partner to satisfy both programs within 12 months.

Industrial Clusters & Opportunity Heat Map

JU

Jubail

Largest integrated petrochemical city; SABIC affiliates and export terminals feeding packaging converters.

YA

Yanbu

Red Sea petrochemical & refining hub with a growing plastics-to-packaging conversion base.

NE

NEOM

Greenfield giga-project; emerging demand for advanced and specialty packaging.

MO

MODON Cities

35+ industrial cities nationwide offering land, utilities & SME incentives.

Opportunity Heat Map — Sector Attractiveness by Cluster

	JUBAIL	YANBU	NEOM	MODON
Packaging	3	3	5	4
Printing	2	2	4	5

Scale: 1 = Low attractiveness — 5 = High attractiveness

04

SECTION 04

UAE Deep Dive

Operation 300bn, ICV scoring and the industrial free zones driving downstream packaging & print growth.

OPERATION 300BN

BOROUGE · ADNOC

KIZAD · ICV

MAKE IT IN THE EMIRATES

Policy & Anchor Players

300

Operation 300bn

10-year strategy to grow UAE industrial GDP from AED 133Bn to AED 300Bn by 2031 — packaging is named a priority sub-sector.

B

Borouge / ADNOC

One of the world's largest single-site polyolefin complexes at Ruwais, feeding regional packaging converters at preferential pricing.

ICV

KIZAD & ICV

Khalifa Industrial Zone offers land, utilities and logistics access; In-Country Value scoring determines eligibility for ADNOC and government tenders.

Make It in the Emirates — Why It Matters for Entrants

- National platform connecting investors directly with government-backed industrial opportunities and incentives.
- Streamlines licensing, land allocation and financing access for packaging and print manufacturers relocating or expanding UAE capacity.
- Signals long-term policy commitment — a strong proof point for board-level investment cases.

05

SECTION 05

Qatar, Oman & Kuwait

Condensed strategy views on the three secondary GCC markets for packaging & printing entrants.

KEY PROJECTS

INVESTMENT PIPELINE

MARKET ATTRACTIVENESS MATRIX

Condensed Market Strategy

QA

Qatar

QatarEnergy petrochemical expansions feed a growing packaging base; Tawteen localization and strong LNG-linked industrial spend. **$9.4B pipeline**

OM

Oman

Duqm & Sohar free zones positioning as low-cost export platforms for packaging conversion. **$6.1B pipeline**

KW

Kuwait

KIPIC/KNPC-led refining integration; New Kuwait 2035 pushing non-oil diversification into packaging. **$4.8B pipeline**

RENIN INSIGHT

Oman offers the fastest, lowest-friction entry point of the three — ideal for a pilot packaging facility — while Qatar's LNG-linked industrial spend makes it the higher-ceiling long-term prize once local partnerships are established. Kuwait remains a selective, relationship-led market best entered through an established local distributor.

06

SECTION 06

Industry Deep Dive

Market size, CAGR, key companies, technology trends and entry barriers across Packaging and Printing.

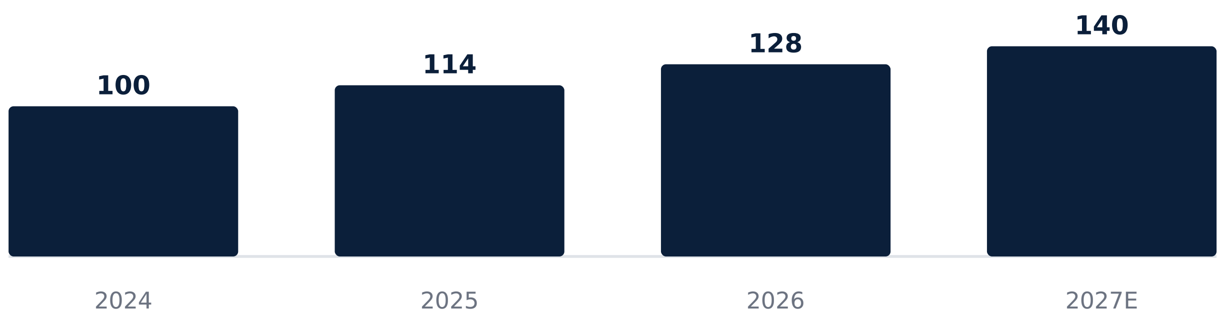
PACKAGING PRINTING

Packaging

$33B
2027E MARKET SIZE

7.8%
2024–27E CAGR

Growth Forecast (Index, 2024=100)



ENTRY BARRIERS

- Brand-owner qualification cycles are long.
- Sustainability certification requirements are rising.
- Freight & warehousing costs for bulky SKUs.

KEY COMPANIES

- Napco Packaging
- Hotpack Global
- Falcon Pack
- Gulf Union Foods Packaging

TECHNOLOGY TRENDS

- Sustainable / recyclable substrates
- Smart & track-and-trace packaging
- E-commerce-optimized formats
- On-demand short-run production

RENIN INSIGHT

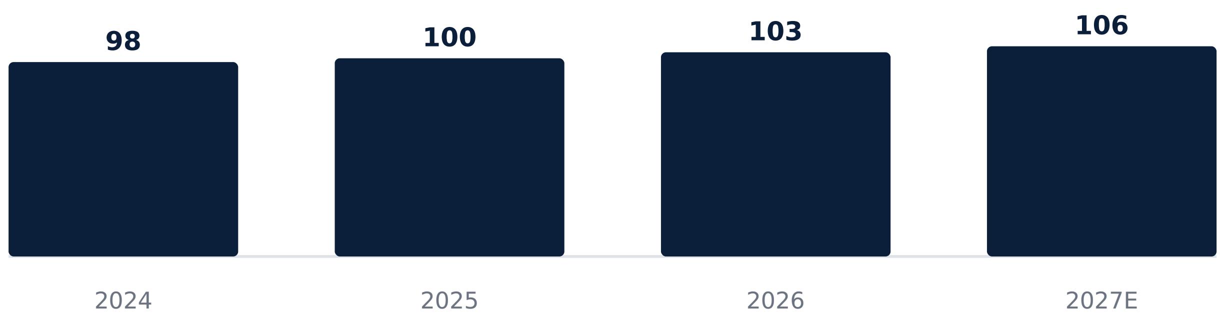
Packaging is the segment most exposed to consumer and e-commerce tailwinds — flexible, sustainable formats are winning share fastest from rigid legacy packaging.

Printing

$12B
2027E MARKET SIZE

3.9%
2024–27E CAGR

Growth Forecast (Index, 2024=100)



ENTRY BARRIERS

- Most localization-sensitive of the two sectors.
- Digital substitution shrinks commercial print demand.
- Thin margins limit capex for new entrants.

KEY COMPANIES

- Al Ghurair Printing & Publishing
- Emirates Printing Press
- Sharjah Publishing City
- Regional label converters

TECHNOLOGY TRENDS

- Digital & variable-data printing
- Sustainable inks & substrates
- Automation of short-run commercial print
- Integration with packaging converters

RENIN INSIGHT

Standalone commercial printing is structurally flat — the durable opportunity is specialty label & packaging print, where converters are consolidating with packaging players.

07

SECTION 07

Competitive Landscape

Positioning the region's key packaging and printing players by market influence and competitive moat.

NAPCO · HOTPACK · FALCON PACK

AL GHURAIR · EMIRATES PRINTING

CHINESE & ASIAN IMPORTERS

Competitive Positioning Matrix

Player Group	Positioning
Napco / Hotpack / Falcon Pack	Regional packaging converters — win on agility & customer proximity
Al Ghurair Printing / Emirates Printing / Sharjah Publishing City	Established print & label houses — compete on integration with packaging converters
Chinese & South/East Asian importers	Aggressive on price — lower brand trust & local content scores
Emerging sustainable-packaging entrants	Niche players — compete on circular material innovation

KEY TAKEAWAYS

- The moat that matters most through 2027 won't be scale — it will be IKTVA/ICV-certified local content. Mid-tier players who lock this in early can out-compete larger but less-localized rivals on public and brand-owner tenders.
- Regional converters (Napco, Hotpack, Falcon Pack) win on agility and customer proximity, not on capital scale.
- Print & label houses are consolidating with packaging players to defend margin as standalone commercial print flattens.
- Chinese and other Asian importers compete aggressively on price but score poorly on localization, limiting their access to government and Aramco-linked tenders.

08

SECTION 08

Procurement Pathways

The step-by-step route to becoming an approved packaging or printing supplier in Saudi Arabia and the UAE.

SUPPLIER REGISTRATION

IKTVA / ICV SCORING

APPROVED VENDOR STATUS

CONTRACT AWARD

Supplier Journey: Saudi Arabia & UAE

Saudi Arabia — Aramco / Government Route

1. Supplier registration (SAP Ariba portal)
2. IKTVA local-content assessment
3. Technical & HSE qualification
4. Approved Vendor List (AVL) entry
5. Contract award & PO issuance

UAE — ADNOC / Free Zone Route

1. Supplier registration (ADNOC portal)
2. In-Country Value (ICV) certification
3. Technical & commercial evaluation
4. Approved Vendor status
5. Contract award & framework agreement

RENIN INSIGHT

These government-linked routes govern industrial and institutional packaging tenders. Brand-owner (FMCG/retail) qualification is a separate, faster commercial process — but suppliers who hold IKTVA/ICV certification typically clear brand-owner audits faster too, since much of the documentation overlaps.

09

SECTION 09

Market Entry Strategy

A phased roadmap from the first 30 days on the ground to a mature three-year regional footprint.

30 / 60 / 90 DAY PLAN | YEAR 1 | YEAR 2 | YEAR 3

The First 90 Days

30

30 Days

Market mapping, entity structuring options, target vendor-list identification, initial JV/agent conversations.

60

60 Days

Local partner shortlisting, IKTVA/ICV pre-assessment, regulatory filings initiated, pilot customer outreach.

90

90 Days

JV/entity formation decision, supplier registration submitted, first RFQ responses, hiring plan finalized.

Year 1–3 Roadmap

Y1

Year 1

UAE pilot operation live; first Approved Vendor status secured; 2–3 reference customers among packaging or print buyers.

Y2

Year 2

Saudi Arabia entity/JV operational; IKTVA score optimization; scale to 8–12 active accounts.

Y3

Year 3

Oman/Qatar expansion; regional manufacturing or bonded-warehouse footprint established.

10

SECTION 10

Events That Matter

The regional calendar that shapes deal flow, vendor visibility and market intelligence for packaging & printing entrants.

GULF PRINT & PACK

GULF 4P EXPO

IKTVA FORUM

Annual Industry Calendar

Month	Event	Location & Focus
February	Gulf Print & Pack	Dubai — printing & packaging technology showcase
June	IKTVA Forum	Dhahran — Aramco local-content & supplier forum
September / December	Gulf 4P Expo	Jeddah / Dammam — flagship cross-sector event covering packaging & printing

RENIN INSIGHT

Gulf Print & Pack and the Gulf 4P Expo are the two must-attend events for first-time packaging and printing entrants — they generate the highest density of qualified buyer and JV-partner introductions, while the IKTVA Forum remains essential for local-content compliance strategy.

Methodology & Data Notes

This report is a strategic-planning template produced for scenario discussion, scoped to the printing and packaging segments of the broader Gulf 4P (Printing, Packaging, Petrochemicals, Plastics) landscape. Market sizes, CAGRs, investment figures and opportunity/attractiveness scores are illustrative and directional, synthesized from public program disclosures and general sector knowledge.

Figures should be validated against primary sources — national statistics offices, Aramco/ADNOC investor disclosures, GCC ministry data and licensed industry databases — before use in investment or board decisions.

Program names (Vision 2030, IKTVA, Nitaqat, Operation 300bn, ICV, Tawteen, Kuwaitization) reflect real government and NOC initiatives; specific scoring thresholds and timelines vary by tender and should be confirmed with the issuing authority.

Company names referenced (Napco, Hotpack, Falcon Pack, Al Ghurair Printing & Publishing, Emirates Printing Press, Sharjah Publishing City, SABIC, Borouge, ADNOC) are cited as illustrative market participants, not as endorsements or verified competitive assessments.

Recommend commissioning primary research — vendor interviews, tender-data analysis, and on-the-ground diligence — to convert this template into a client-ready deliverable.