

Indonesia Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Indonesia Flexible Packaging Market size is estimated at USD 4.58 billion in 2025, and is expected to reach USD 5.77 billion by 2030, at a CAGR of 4.75% during the forecast period (2025-2030).

Key Highlights

- Flexible packaging offers economical and customizable solutions for product packaging. Industries such as food and beverage, personal care, and pharmaceuticals benefit from its versatility. Its popularity stems from its efficiency and cost-effectiveness. In Indonesia, the flexible packaging market is driven by factors like the growing demand for lightweight packaging, heightened consumer awareness of sustainability, and technological advancements that enhance shelf life and product protection.
- The adaptability of flexible packaging to various shapes and sizes, combined with its cost-effectiveness and transport ease, fuels market growth. As Indonesian industries increasingly prioritize eco-friendly solutions and consumers demand convenience, the flexible packaging market is set for expansion. Indonesia's flexible packaging market is pivotal in the nation's sustainability journey, transitioning from single-layer plastics to multilayer, high-barrier, recyclable materials. The market is driven by the burgeoning population and the increasing demand for affordable packaging. It is also influenced by the local food, beverage, and pharmaceutical industries.
- Indonesia's food and beverage industry is a cornerstone of its economic growth. As reported by Permata Bank Economic Research, this industry has consistently bolstered Indonesia's manufacturing landscape. In 2023, food and beverage manufacturing capacity utilization increased to 75.0% from 74.6% the previous quarter, mirroring a rise in industrial activities. As food and beverage manufacturing ramps up, the demand for flexible packaging is also expected to increase.
- The rising demand for personal care products in Indonesia is boosting the need for flexible packaging, which enhances product aesthetics, preserves quality, and extends shelf life. Innovative flexible packaging designs attract consumers, driving up volume sales of products such as sachets and pouches.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Indonesia's economic growth and the increased appetite for convenient, single-serve foods have spurred flexible packaging production. In response, market vendors are expanding their capacities. The rapidly growing Indonesian manufacturer, Putra Naga Indotama, is investing in cutting-edge machinery to bolster business with both existing and new clientele.
- According to the data from the Organisation for Economic Co-operation and Development (OECD) and the Food and Agriculture Organization (FAO), by 2030, per capita consumption of fresh dairy products in Indonesia will reach approximately 3.82 kilograms. While dairy is not a daily staple for many Indonesians, products like fresh milk, cheese, and yogurt are gaining popularity, especially among middle-income families. As consumption rises, the demand for flexible packaging tailored for dairy products is also expected to increase.
- Plastic packaging solutions find applications across various sectors, including manufacturing, retail, and healthcare. The healthcare sector, in particular, has embraced plastic packaging for its barrier qualities, extended shelf life, and durability. However, growing awareness of the environmental impacts of single-use plastics and unsustainable practices has led consumers to demand products with a positive ecological footprint. This shift in consumer sentiment poses a challenge to the market's growth.
- In Indonesia's evolving market, the rising emphasis on sustainability and convenience is reshaping trends in flexible packaging. Companies across the nation are channeling investments into advanced sustainable solutions, harnessing recycled materials, and adopting emission-reducing manufacturing processes, thereby unlocking avenues for market expansion.

Key Highlights

- For instance, PT Charoen Pokphand Indonesia (CPI) Flexible Packaging, in collaboration with BOBST, has charted a growth trajectory of 10% annually since its 2019 inception. BOBST, a premier supplier in substrate processing, printing, and converting equipment, caters to diverse industries, including labels, flexible packaging, and corrugated industries. This partnership has been pivotal, with oneECG (Extended Color Gamut) technology standing out as a major driver. This technology empowers CPI to deliver high-quality, flexible packaging consistently and swiftly, all while curtailing costs and enhancing sustainability.
- PT Himalaya Wellness Company is prioritizing sustainable packaging. Committed to minimizing its packaging footprint, the company is embracing eco-friendly formats and structures through innovative materials. The company's product development process is centered on reducing carbon and environmental impact. The company has transitioned 50% of its product range from PVC to recyclable PET and aims for a complete PVC phase-out, replacing it with eco-friendly alternatives across its portfolio.

Indonesia Flexible Packaging Market Trends

Packaging Films Are Expected to Witness Significant Growth

- The market for packaging films and wraps is growing, driven by the escalating demand for high-performance films. As various end-user industries increasingly require enhanced barriers, advancements in processing technologies are poised to bolster the adoption of packaging films, ensuring both suitability for applications and cost-effective production.
- Amid a rising focus on sustainability, there is a shift from traditional rigid packaging to innovative, flexible solutions. This evolution, coupled with a heightened demand for consumer-friendly packaging and enhanced product protection, positions film and wrap packaging as a leading, cost-effective alternative in the nation.
- Indonesian consumers are increasingly favoring convenience foods and ready-to-eat meals. In response, food and beverage manufacturers are adopting thermoforming packaging films. Renowned for their exceptional barrier properties, these films are predominantly used for vacuum packaging perishables, such as meat and seafood, effectively preserving their freshness.
- Stretch films are gaining traction as the go-to solution for bundled packaging, especially for beverages, personal care items, and household products. With Indonesia's retail and e-commerce sectors on the rise, there is a heightened focus on ensuring products arrive at stores undamaged and secure. With its bundling and protective capabilities, stretch films are becoming increasingly favored. Furthermore, as shipping and logistics operations expand, the demand for efficient and cost-effective bundling solutions

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

rises, a niche where stretch films excel.

- According to the Singapore Retailers Association, Indonesia's retail sector is rapidly growing, contributing approximately 13% to the nation's GDP. The country's vast population of over 270 million, an expanding middle-income group with enhanced purchasing power, and millennials with pronounced spending habits underscore its retail potential. Consequently, the advantages of packing films, combined with the burgeoning retail sector, are propelling the flexible packaging market's growth in Indonesia.
- Indonesia's e-commerce sector is witnessing robust and consistent growth, which signals immense potential. Stretch film plays a pivotal role in e-commerce packaging, primarily ensuring the security of shipments. It acts as a formidable barrier and prevents items from shifting during transit. This becomes especially vital for delicate or fragile products that demand heightened care to avert damage.
- As reported by The International Trade Administration, the market value of packaging films exceeded USD 52.93 billion in 2023, with forecasts suggesting a climb to over USD 86.81 billion by 2028. Thus, the benefits of packaging films such as stretch films, coupled with the expanding retail landscape, are driving the growth of the market for packaging films in Indonesia.

The Food Industry Holds a Major Market Share

- The food and beverage (F&B) industry is a hotbed of innovation and product development. The industry relies on a nimble and adaptive packaging industry. Indonesia's consumer confidence index stood at 123.8 in 2023, indicating robust spending optimism for the upcoming year. Mineral water and instant noodles emerged as top consumer favorites.
- Staple goods, alongside cooking oils, are cornerstones of the Indonesian diet. Non-staple items like packaged spices and coffee have witnessed a notable uptick in spending over the last five years. This trend toward convenient cooking and heightened productivity underscores the sustained strength of the consumption of packaged spices and coffee.
- Indonesia's preference is shifting toward flexible packaging. This type of packaging is not only economical but also customizable, catering to a diverse range of products. Industries like food and beverage and personal care, which often require versatile packaging solutions, find flexible packaging particularly advantageous. Its rising popularity can be attributed to its efficiency and cost-effectiveness.
- Millennial consumers in Indonesia favor single-serving and on-the-go food options, which primarily drive the demand for flexible packaging solutions. Such preferences make flexible packaging the go-to choice, given its portability, durability, and lightweight nature. In recent years, there has been a marked increase in consumer spending across a diverse range of food items in Indonesia. This includes bakery and cereal bars, ready meals, coffee or hot chocolate sticks and pouches, dehydrated foods, snack foods, nuts, spices, chocolates, sweets, ice-cream novelties, cookies, cakes, and chips. Such heightened demand has bolstered the popularity of flexible packaging items, particularly stand-up gussets and pillow pouches, in the food industry.
- Pillow pouches, in particular, have seen a surge in adoption, especially within the food, beverage, and dairy industries. The appeal of pouches lies in their affordability, effective sealing capabilities, and cost-efficient transportation.
- However, stricter regulations advocating for sustainable packaging alternatives, driven by environmental concerns over plastic waste, pose significant challenges to the market. Additionally, global raw material price fluctuations, especially for polyethylene and polypropylene, can reduce manufacturers' profit margins and restrain market growth. While Indonesia is making strides in promoting plastic recycling, its recycling infrastructure and public awareness still lag, complicating efficient plastic waste management and sustainable market expansion.
- Rising environmental consciousness presents an opportunity for the development of eco-friendly flexible packaging, especially those that are recyclable and biodegradable. With a burgeoning food and beverage industry, which is spurred by evolving consumer preferences and an expanding middle-income group, Indonesia presents lucrative opportunities for the flexible packaging market, especially in industries like dairy, snacks, and beverages.
- In Indonesia, businesses are rolling out a diverse array of high-quality paper bags. Crafted from durable materials, these bags feature a strong adhesive seal at the top. Tailored for the food packaging industry, these adaptable paper bags serve as an ideal choice for restaurants, hotels, cafes, and other similar venues. They are available in multiple sizes and can be tailored to meet

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

specific needs. These bags can handle significant weight, enhancing their appeal in the food and beverage service sector. They are also lightweight and sturdy.

- Continuous advancements in plastic packaging technologies pave the way for product innovation and differentiation. For instance, smart sensors embedded in flexible packaging can relay data on temperature, humidity, and other environmental factors to a centralized system, amplifying the functionality and allure of flexible packaging.

Indonesia Flexible Packaging Industry Overview

- The flexible packaging market in Indonesia is fragmented as it has several players. The key players in the market are constantly making efforts to bring advancements. Some of the major players include Primajaya Eratama, PT ePac Flexibles Indonesia, PT Indonesia Toppan Group, PT Dinakara Putra, and PT Artec Package Indonesia.

- End-use consumers in Indonesia, including companies like PT Dolphin Food & Beverages, PT Aimfood Manufacturing Indonesia, and PT RBFOOD MANUFAKTUR INDONESIA, and domestic pharmaceutical giants such as PT Kalbe Farma Tbk and PT Kimia Farma Tbk, are increasingly adopting flexible packaging. This trend is significantly contributing to the growth of the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of 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 Buyers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitute
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Industry Regulations and Recycling Policies in Indonesia

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Shift Toward Light Weight and Smaller Pack Types in the Country
 - 5.1.2 Rising Demand for Sustainable Packaging Solutions

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2 Market Restraints

5.2.1 Lack of a Defined Recycling Plans Coupled with Environmental Challenges

6 MARKET SEGMENTATION

7 By Material Type

7.1 Plastics

7.1.1 Polyethylene (PE)

7.1.2 Bi-Orientated Polypropylene (BOPP)

7.1.3 Cast Polypropylene (CPP)

7.1.4 Ethylene Vinyl Alcohol (EVOH)

7.1.5 Polyvinyl Chloride (PVC)

7.1.6 Others Plastics Types

7.2 Paper

7.3 Metal

8 By Product Type

8.1 Bags and Pouches

8.2 Films and Wraps

8.3 Other Product Types

9 By End-user Industry

9.1 Food

9.2 Beverage

9.3 Pharmaceutical and Medical

9.4 Household and Personal Care

9.5 Other End-User Industries

10 COMPETITIVE LANDSCAPE

10.1 Company Profiles

10.1.1 Primajaya Eratama

10.1.2 PT ePac Flexibles Indonesia

10.1.3 PT Indonesia Toppan Group

10.1.4 PT Dinakara Putra

10.1.5 PT Artec Package Indonesia

10.1.6 Mondi Group

10.1.7 PT Trias Sentosa Tbk

10.1.8 PT Indopoly Swakarsa Industry Tbk

10.1.9 PT Argha Prima Industry

10.1.10 PT Lotte Packaging

10.1.11 PT Karuniatama Polypack

10.1.12 PT. Masplast Poly Film

10.1.13 PT Polidayaguna Perkasa

11 INVESTMENT ANALYSIS

12 FUTURE OUTLOOK OF THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Indonesia Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

