

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

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Report description:

The Indonesia Paper Packaging Market size is worth USD 15.15 Billion in 2025, growing at an 6.07% CAGR and is forecast to hit USD 20.34 Billion by 2030.

Key Highlights

- The presence of numerous paper mills in Indonesia bolsters the availability and affordability of paper packaging materials, driving demand across diverse industries. For instance, as per Paper Desk in November 2023, Indonesia's pulp and paper industry consisted of 112 companies with a total capacity of 11.45 million tons of pulp and 20.65 million tons of paper, contributing significantly to the country's economy.
- Domestic industries like e-commerce and food delivery services, among others, will continue to grow over the coming years, and so will the consumption of pulp and paper products. This presents significant market entry and investment opportunities across the country.
- The increase in the paper packaging industry in Indonesia is driven by the expansion of the retail and e-commerce industries and the growing demand for eco-conscious packaging solutions in the country. According to Trading Economics, retail sales in Indonesia increased by 6.4% Y-o-Y in February 2024, sharply picking up from the 1.1% growth registered in the previous month.
- There is a growing need for affordable secondary corrugated board packaging since the logistics chain for direct-to-consumer delivery is getting more complicated. E-commerce shipments are anticipated to be handled up to 20 times or more during ordinary distribution.
- With online retailers' growing sales, they naturally need more packing and shipping supplies. This is one of the reasons for the current and future growth of the corrugated boxes market. Corrugated boxes are becoming the material of preference for online-based delivery channels due to the rising need for sustainability.
- Paper packaging also finds extensive application in food packaging as it is environmentally sustainable and convenient for

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consumers. Paper packaging products such as folding cartons and corrugated boxes are ideal for food packaging, specifically for non-greasy items. These boxes are known for their sturdy structures, allowing businesses to transport food products reliably. A corrugated box stores food in a clean and sealed container to minimize spoilage risk.

Indonesia Paper Packaging Market Trends

Corrugated Boxes Expected to Register Significant Adoption

- Factors such as rising urban populations, growing environmental consciousness, the nation's increasing demand for sustainable packaging solutions, the rise in demand for convenient packaging, and the expansion of e-commerce activities are accelerating the growth of the corrugated packaging market in Indonesia.
- The usage of corrugated boards for packaging is increasing due to the significant demand for fast-moving consumer goods (FMCG) and branded consumer durables. Corrugated boards are widely used in the food and beverage industry to package processed foods, including bread, snacks, ready-to-eat (RTE) meals, meat products, fruits, durable foods, and beverages.
- Foodservice establishments, for instance, use corrugated boxes to package pizza. The demand for high-quality packaging services has been driven by a shift in consumer lifestyles and the increased desire for convenience food, fueling the expansion of the corrugated board industry across the country.
- Corrugated packaging plays a crucial role in e-commerce by providing robust protection to products during transit, thus reducing shipment returns due to tampered packaging. According to the International Trade Administration's report published in January 2024, Indonesia's e-commerce market size was USD 52.93 billion in 2023 and is expected to reach USD 86.81 billion by 2028. With the rising trend of online shopping, a parallel increase in the demand for packaging materials is also expected over the coming years.

The Food and Beverage Industry is Expected to Exhibit the Highest Market Growth

- Paper packaging is being extensively used in the food segment. It is both environmentally beneficial and convenient for consumers. As a result, there is tremendous competition in the food and beverage industry among companies that provide high-quality products to consumers. Various packaging materials, such as cardboard and corrugated boxes, are available to satisfy multiple packaging needs.
- E-commerce platforms have gained much attention in the Indonesian food industry. This is because they offer various food products and ensure those are delivered on time and in proper packaging. With the expansion of e-commerce, the demand for food packaging is expected to rise. Innovative packaging preserves a product's quality and extends its shelf-life.
- Millennial customers in the country primarily drive the demand for flexible paper packaging solutions, as they favor single-serving and on-the-go food and beverage products. Flexible paper packaging is a common alternative for packing these products because it is meant to be portable, sturdy, and lightweight. The need for flexible packaging from the food and beverage industry in the country is likely to be governed by the fastest-growing categories of snack foods, both fresh and processed foods.
- The rising per capita income, increasing urbanization, and a high youth population are expected to boost the country's packaged food and beverage industry's rise. This will help fuel the increase in folding carton packaging in the food retail and restaurant industries. Paper packaging will benefit from growing concerns about the sustainability of plastic packaging.
- According to the Organization for Economic Co-operation and Development, the human consumption of fresh dairy products in Indonesia in 2031 will be around 5.01 kilograms per capita. The organization's study outlines that despite fresh dairy products not being a regular staple in the Indonesian daily diet, dairy products like fresh milk, cheese, and yogurt have gained traction among middle-income families. The rising consumption of dairy products in Indonesia intends to propel the adoption of paper packaging

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due to its freshness, preservation, and eco-friendly attributes, aligning with consumer preferences for sustainable packaging solutions.

Indonesia Paper Packaging Industry Overview

The Indonesian paper packaging market is fragmented due to several prominent market players holding the majority share. The market players, such as SIG Group AG, PT Industri Pembungkus Internasional, PT Fajar Surya Wisesa Tbk, PT Metaform (Kompas Gramedia), AR Packaging Group AB, and Rengo Co. Ltd, are considering strategic partnerships and collaborations to expand their market share.

- January 2024: PT Riau Andalan Paperboard International, a subsidiary of Asia Pacific Resources International Limited (APRIL Group), began commissioning its new USD 2.3 billion paperboard manufacturing plant. This move brings the facility closer to its anticipated full-scale commercial production, set for later this year. The new paperboard facility underscores APRIL Group's strategy of diversifying downstream into high-value-added products, aiming for sustainable business growth. This strategy capitalizes on the company's strength as a fully integrated producer of fiber-based consumer products.
- May 2024 - Krista Exhibitions, an international-scale exhibition organizer, announced that ALLPack Indonesia 2024 will take place alongside the AllPrint Indonesia Expo 2024. The event is scheduled for October at the Jakarta International Expo (JIExpo) center in Kemayoran, Jakarta. The 23rd edition of ALLPack Indonesia 2024 will highlight processing and packaging technologies catering to a diverse range of industries, including food, beverages, biscuits, confectionery, pharmaceuticals, traditional herbal drinks, cosmetics, personal care, beauty, agriculture, electronics, and coolers.

Additional Benefits:

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

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