

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

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Report description:

The Indonesia Plastic Packaging Market size is worth USD 10.47 Billion in 2025, growing at an 6.65% CAGR and is forecast to hit USD 14.45 Billion by 2030.

Key Highlights

- Technological advancements and expanding end-user industry packaging applications are key factors driving the growth of Indonesia's packaging market. The country's increasing population and rising per capita packaging consumption contribute significantly to this trend. Consumer behavior shifts, including the growing demand for convenience products and the increased adoption of plastic as an alternative to traditional packaging materials, further propel market expansion.
- Plastic packaging has implemented new ways for the packaging industry to function. Durable, lightweight, and comfortable packaging solutions have augmented the use of plastics as a packaging material across the region.
- Economic growth and the need for single-serve, on-the-go convenience foods in Indonesia have increased flexible packaging production. Among flexible packaging product types, pouches are expected to hold a significant share due to the country's increasing market for Ready-to-Eat (RTE) foods, owing to the busy lifestyle and many working populations. The studied market is anticipated to opt for a low-cost alternative for liquid and beverage packaging and hence see wide usage of flexible packaging as it is cheaper than other types of packaging.?
- The price of LDPE packaging is currently low in the region, which means that the additional cost of using the material will have minimal impact on sellers. The demand for surgical masks made of polypropylene, polyisoprene, and polyurethane has also increased.
- Plastic pollution has emerged as a global environmental concern, with numerous studies highlighting its detrimental effects on ecosystems. In response, Indonesia has implemented regulations to curb plastic usage. The Indonesian plastic packaging market now faces significant challenges due to rising plastic resin prices. This trend has resulted in delays in recovering increased resin

costs and diminished profitability for established local manufacturers.

Indonesia Plastic Packaging Market Trends

Polyethylene Terephthalate (PET) Occupies the Largest Market Share

- Due to their lightweight and durable nature, PET bottles are increasingly replacing glass bottles. This shift allows for more cost-effective transportation of mineral water and other beverages. PET's transparency and inherent CO2 barrier properties suit it for various applications. The material can be easily moulded into bottles or other shapes, and its properties can be enhanced with additives such as colourants, UV blockers, and oxygen barriers to meet specific brand requirements.
- In rigid packaging, PET produces microwavable food trays and bottles for various products, including soft drinks, water, juices, sports drinks, beer, condiments, and food containers. The demand for PET bottles is growing across multiple sectors, including home care, beverages, and personal care. This growth is primarily driven by consumer preferences and PET's key attributes, such as its lightweight nature and high recyclability.
- Increased demand for milk will necessitate more packaging production. This growth can lead to investment in new manufacturing facilities, expanded production capabilities, and technological advancements in PET packaging.
- The Organisation for Economic Cooperation and Development forecasts that Indonesia's consumption of fresh milk products will increase over the coming years. They project a compound annual growth rate of approximately one kilogram per capita (+24.88%) and estimate that by 2031, the consumption per capita will reach 5.01 kg.
- This anticipated rise in fresh dairy product consumption is expected to impact Indonesia's PET bottle packaging market positively. PET bottles are a commonly used material for packaging various products, including dairy items.

Food Segment to Show Significant Growth

- Rapid urbanization and the growing number of supermarkets, hypermarkets, grocery stores, convenience stores, and shopping centers increase the market for pouches and bags. The growth of the food and beverage industry also positively impacts the market. Furthermore, the changing consumer preferences towards eco-friendly products also drive the need for non-biodegradable plastic pouches and bags.
- The United States Department of Agriculture (USDA) reports that Indonesia presents substantial opportunities for United States ingredient suppliers to meet the raw material needs of its food processing industry. The United States ranks as the third-largest agricultural supplier to Indonesia, holding an 11% market share. In 2023, soybeans and dairy products constituted approximately half of all US agricultural exports to Indonesia.
- Starting October 17, 2024, halal certification will become mandatory for numerous foods, ingredients, additives, and all processed food products in Indonesia.
- As the demand for halal-certified food products rises, there will be a parallel need for packaging that meets halal standards. This could lead to increased demand for plastic packaging that is certified or specifically designed to handle halal products.
- The organic food sector often emphasizes sustainability and environmental responsibility. This trend can drive the development and adoption of more eco-friendly plastic packaging solutions, such as biodegradable or recyclable plastics. Companies will likely invest in creating packaging that aligns with the organic market's values.

- According to the Organic Trade Association, in 2022, the consumption value of organic packaged food in Indonesia amounted to around USD 15.7 million. The value was forecast to increase to USD 19 million in 2025.
- According to Statistics Indonesia, in March 2024, urban households in Indonesia allocated roughly 46.6% of their expenditure to food and 53.4% to non-food items. Throughout the measured period, the distribution of income spent on food versus non-food remained relatively stable for these households.

Indonesia Plastic Packaging Industry Overview

The market is semi-consolidated and driven by several key players. Amcor Group, Prima Jaya Eratama, PT ePac Flexibles Indonesia, PT Berlinia Tbk, and PT Indo Tirta Abadi are pivotal in addressing the surging demand for packaging solutions. These companies are not only moving away from conventional plastic packaging but are also aligning with the growing consumer preference for sustainable plastic alternatives. To bolster their market presence, these firms are fine-tuning their strategies, broadening their product offerings, and actively seeking collaborations and acquisitions, with a pronounced focus on sustainability.

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 Consumers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Adoption of Lightweight Packaging Methods
 - 5.1.2 Increased Eco-friendly Packaging and Recycled Plastic
- 5.2 Market Challenges

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- 5.2.1 High Price of Raw Material (Plastic Resin)
- 5.2.2 Government Regulations and Environmental Concerns

6 MARKET SEGMENTATION

- 6.1 Rigid Plastic Packaging
 - 6.1.1 Material Type
 - 6.1.1.1 Polyethylene (PE)
 - 6.1.1.2 Polyethylene terephthalate (PET)
 - 6.1.1.3 Polypropylene (PP)
 - 6.1.1.4 Polystyrene (PS) and Expanded polystyrene (EPS)
 - 6.1.1.5 Polyvinyl chloride (PVC)
 - 6.1.1.6 Other Material Types
 - 6.1.2 Product Type
 - 6.1.2.1 Bottles and Jars
 - 6.1.2.2 Trays and containers
 - 6.1.2.3 Other Product Types
- 6.2 Flexible Plastic Packaging
 - 6.2.1 Material Type
 - 6.2.1.1 Polyethene (PE)
 - 6.2.1.2 Bi-orientated Polypropylene (BOPP)
 - 6.2.1.3 Cast polypropylene (CPP)
 - 6.2.1.4 Polyvinyl Chloride (PVC)
 - 6.2.1.5 Ethylene Vinyl Alcohol (EVOH)
 - 6.2.1.6 Other Material Types
 - 6.2.2 Product Type
 - 6.2.2.1 Pouches
 - 6.2.2.2 Bags
 - 6.2.2.3 Films & Wraps
 - 6.2.2.4 Other Product Types
- 6.3 End-user Industry
 - 6.3.1 Food
 - 6.3.2 Beverage
 - 6.3.3 Healthcare
 - 6.3.4 Cosmetics and Personal Care
 - 6.3.5 Other End-user Industry

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Amcor Group
 - 7.1.2 Prima Jaya Eratama
 - 7.1.3 PT ePac Flexibles Indonesia
 - 7.1.4 PT Berlina Tbk
 - 7.1.5 PT Indo Tirta Abadi
 - 7.1.6 Sonoco Products Company
 - 7.1.7 PT Solusi Prima Packaging
 - 7.1.8 PT Hasil Raya Industries
 - 7.1.9 PT Indonesia Toppan Printing

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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