

# Indonesia Corrugated Packaging Industry Research Report 2024-2033

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## Abstracts

Indonesia, located between the Indian and Pacific Oceans, is a nation within both Southeast Asia and Oceania. As of 2023, it boasts a population of approximately 280 million, making it the largest economy in Southeast Asia. The manufacturing industry significantly contributes to this status, adding more than US\$ 250 billion to the Indonesian economy and accounting for about 18% of its GDP.

The packaging industry is among the fastest-growing sectors in Indonesia. With the expansion of e-commerce and the transportation sector, the corrugated packaging industry has seen consistent growth. According to CRI, currently, there are over 170 corrugated cardboard production lines in Indonesia, predominantly situated in the Greater Jakarta area of West Java, producing more than 4.5 million tons annually. In 2023, the corrugated packaging market in Indonesia is valued at approximately US\$ 1.39 billion.

Corrugated packaging production and sales in Indonesia are heavily reliant on the manufacturing and logistics sectors. In 2023, the manufacturing sector's output grew by 4.07% year-on-year. According to CRI, key industries such as food and beverages, coal and refined petroleum, chemicals, transportation, and metals and electronics are significant contributors to Indonesia's manufacturing GDP. Over the past decade, from 2014 to 2023, Indonesia's manufacturing industry has averaged a growth rate of 3.5% per year.

Although Indonesia's logistics industry has experienced rapid growth, it still faces significant inefficiencies, with logistics costs amounting to more than 14% of GDP in 2023, indicating substantial potential for improvement.

The surge in e-commerce has notably boosted the logistics sector. In 2022, Indonesia led ASEAN countries with an e-commerce gross merchandise value (GMV) of approximately US\$ 51.9 billion, a figure that is projected to climb to US\$ 62 billion in 2023. This boom in e-commerce has also spurred the growth of the packaging industry, particularly the corrugated paper products sector.

The market for corrugated paper products in Indonesia is currently fragmented, featuring both international companies and local suppliers. According to CRI, prominent local players include Asia Pulp & Paper (APP), Industri Pembungkus Internasional Pt, and PT. Fajar Surya Wisesa Tbk (Fajar Paper), alongside foreign entities like Rengo Co. Ltd, which operate as joint ventures or foreign investments. The Indonesian government's 2019 initiative to ban single-use plastic products nationwide is expected to further boost the corrugated paper products industry.

With a growing population and expanding manufacturing and logistics industries, the corrugated packaging sector in Indonesia is poised for continued growth. According to CRI estimates, the market size for Indonesia's corrugated packaging is expected to reach US\$ 3.41 billion by 2033, with a compound annual growth rate (CAGR) of 9.4% from 2024 to 2033.

Topics covered:

Overview of Indonesia's corrugated packaging industry

Economic environment and policy environment of corrugated packaging in Indonesia

Indonesian corrugated packaging market size from 2019 to 2023

Analysis of major Indonesian corrugated packaging manufacturers

The main driving forces and market opportunities of Indonesia's corrugated packaging industry

What are the key drivers, challenges and opportunities for the Indonesian corrugated packaging industry during the forecast period 2024-2033?

What is the expected revenue of the Indonesian corrugated packaging market during the forecast period 2024-2033?

What strategies are adopted by the key players in the market to increase their market share in the industry?

Which segment of the Indonesian corrugated packaging market is expected to dominate the market in 2033?

Indonesia corrugated packaging market forecast from 2024 to 2033

What are the main headwinds facing the Indonesian corrugated packaging industry?

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