



Processed Meat and Seafood Packaging in Indonesia

September 2025

KEY DATA FINDINGS

2024 DEVELOPMENTS

Flexible plastic is the fastest-growing pack type for processed meat and seafood in 2024, offering high protection despite its light weight
Smart and sustainable pack types transform processed meat and seafood packaging in Indonesia
Metal food cans important in shelf stable processed meat packaging in Indonesia

PROSPECTS AND OPPORTUNITIES

Packaging volumes poised for expansion across the board as consumers look for convenient forms of protein
Metal food cans in 185g pack size poised to grow in the forecast period for packaging shelf stable seafood

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EXECUTIVE SUMMARY

Packaging in 2024: The big picture
2024 key trends
Indonesian packaged food players embrace sustainable materials and strategic pack sizing
Leading brands like Coca-Cola shift towards sustainability with fully recycled PET
Metal cans continue gaining share from glass bottles in alcoholic drinks due to their versatility and cost effectiveness
Indonesia's beauty and personal care packaging defined by a strong sustainability-driven overhaul
Flexible plastic remains the backbone of home care packaging, with refill packs ever more popular
Packaging for pet food prioritises convenience and affordability over sustainability

PACKAGING LEGISLATION

Government introduces the National Roadmap and Action Plan for a Circular Economy (Indonesia 2025-2045)
2025-2029 National Medium-Term Development Plan (RPJMN)
Bali Clean Waste Movement bans production and distribution of beverage containers of less than one litre

RECYCLING AND THE ENVIRONMENT

Sustainability and Innovation like MAP and biodegradable films gain popularity
Pack size trends shift as consumers move towards convenience and affordability
Regulatory changes playing an important role in manufacturing and buying habits
Table 1 - Overview of Packaging Recycling and Recovery in Indonesia: 2022/2023 and Targets for 2024

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