

Indonesia Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Indonesia Freight and Logistics Market size is estimated at USD 119.45 billion in 2024, and is expected to reach USD 152.54 billion by 2029, growing at a CAGR of 5.01% during the forecast period (2024-2029).

Government investment in the Indonesian infrastructure development is anticipated to propel the market's growth

- Infrastructure development has recently become a popular aim worldwide. Through Presidential Instruction No. 5/2020 on Arrangement of the National Logistics Ecosystem, the Indonesian government has developed an action plan to improve national logistics performance. The national logistics system reform aims to reduce logistics costs from 24% to 17% of the GDP in 2024. The government's strategic move is to increase port efficiency to reduce national logistics costs.
- In 2021, FDI in the vehicle and transportation industries in Indonesia reached USD 1,502 million, despite the decline in motor vehicle sales and production caused by the pandemic. In 2022, the FDI in vehicle and other transportation industries in Indonesia amounted to USD 1,522 million. Also in 2021, Indonesia signed 8 trade agreements, demonstrating its commitment to fostering economic growth amidst the COVID-19 pandemic. Some agreements are still under negotiation such as - the Indonesia-Chile FTA, Indonesia-EFTA FTA, Indonesia-South Korea FTA, Indonesia-US FTA, and Indonesia-EU FTA.
- As of Q1 2023, various projects are completed and operational. For instance, the government has constructed 11 ferry ports from a target of 36 ports by 2024. Optimization of the maritime highway program is also continuing. Currently, 32 ships are operating, serving 32 routes and stopping at 114 ports, including those in Papua and West Papua provinces. Air transportation infrastructure is also being improved continuously. The government has set a target to build 10 new airports serving 43 air routes by the end of 2024. In the long run, the Indonesia Emas (Golden Indonesia) 2045 vision aims to open up opportunities for the domestic shipping industry to increase capacity in line with optimal export and import performance.

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Indonesia Freight and Logistics Market Trends

Fueled by investment and increased mobility, the transportation and storage sector of Indonesia witnessed a rise by 36.68% YoY in 2022

- In 2022, transportation and storage experienced remarkable growth, surging by 36.68% YoY, due to higher community mobility and increased foreign tourist arrivals. The sector continued its rapid expansion in Q1 2023, recording a 15.93% YoY growth rate. During the same period, Indonesia achieved an impressive total investment realization of IDR 328.9 trillion (USD 0.021 trillion), representing 23.5% of its full-year investment target for 2023. Road transport accounted for 44% of the transport sector's GDP contribution, and rail accounted for only 1.4%.

- Indonesia's transportation and storage sector is crucial for facilitating the movement of goods, people, and services across the vast archipelago, contributing significantly to the country's economy. In the second quarter of 2022, the transportation and warehousing sector experienced a notable growth rate of 21.27% compared to the same quarter in 2021. Additionally, the first quarter of 2022 saw a positive growth rate of 15.79% in the sector. To enhance the transport and storage sector and support the development of the new Indonesian capital city, the government allocated approximately USD 19.27 million for road infrastructure projects in the Sepaku sub-district, Penajam Paser Utara district.

- Indonesia is set to allocate approximately USD 240 billion for infrastructure advancements from 2022 to 2024. Nevertheless, the nation's focus on infrastructure expansion primarily centers around transportation. Within this sector, road, rail, and port infrastructure projects constitute 29%, 22%, and 23%, respectively, of the overall value of ongoing and upcoming infrastructure initiatives. In 2022, the foreign direct investment in vehicle and other transportation industries in Indonesia amounted to approximately USD 1.5 billion.

Indonesia faced fiscal challenges amid surging crude oil prices and subsidy pressures in 2022

- The price of the Indonesian crude basket increased to an average of USD 99.4 per barrel between January and April 2022, compared to USD 68.5 per barrel in 2021, recording a 45% increase YoY. In the face of a widening gulf between domestic and international prices, state-owned Pertamina adjusted prices of three non-subsidized, high-grade fuel variants - Pertamina Turbo, Dextrite, and Pertamina Dex. After that, the price of unsubsidized Pertamina rose by 39% to USD 0.83 from April, with the fuel types accounting for 16% of total consumption and the rest of the subsidized fuels. By contrast, the prices of commonly used subsidized variants, Peralite (90) and Premium (88), which accounted for over 80% of consumption, have remained unchanged for the past three years.

- In Q1 2022, total subsidies were up by 80% YoY, of which energy subsidies increased by 55% YoY. Compensation due to PT Pertamina amounted to USD 3.3 billion in 2020, of which USD 1.06 billion was pending, alongside USD 4.56 billion for 2021, which might have been much higher than the budgeted USD 9.32 billion in 2022. Assuming a 20% increase in total subsidies and higher compensation toward the state-owned oil player, a cumulative headroom for 0.4% of GDP will be required of this year's math for the country to remain within the -4.85% target.

- To reduce growing subsidies, the Indonesian government increased subsidized fuel prices by approximately 30% in September

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2022 despite the potential risk of mass protests. The price of subsidized gasoline was raised from IDR 7,650 (USD 1.18) per liter to IDR 10,000 (USD 0.67) per liter, while the price of subsidized diesel rose from IDR 5,150 (USD 0.35) per liter to IDR 6,800 (USD 0.46) per liter.

Indonesia Freight and Logistics Industry Overview

The Indonesia Freight and Logistics Market is fragmented, with the top five companies occupying 1.78%. The major players in this market are Expeditors International, Linfox Pty Ltd, PT ABM Investama Tbk, PT Lautan Luas TBK and PT Samudera Indonesia TBK (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

- 3.1 Study Assumptions & Market Definition
- 3.2 Scope of the Study
- 3.3 Research Methodology

4 KEY INDUSTRY TRENDS

- 4.1 Demographics
- 4.2 GDP Distribution By Economic Activity
- 4.3 GDP Growth By Economic Activity
- 4.4 Inflation
- 4.5 Economic Performance And Profile
 - 4.5.1 Trends in E-Commerce Industry
 - 4.5.2 Trends in Manufacturing Industry
- 4.6 Transport And Storage Sector GDP
- 4.7 Export Trends
- 4.8 Import Trends
- 4.9 Fuel Price
- 4.10 Trucking Operational Costs
- 4.11 Trucking Fleet Size By Type
- 4.12 Logistics Performance
- 4.13 Major Truck Suppliers
- 4.14 Modal Share
- 4.15 Maritime Fleet Load Carrying Capacity
- 4.16 Liner Shipping Connectivity
- 4.17 Port Calls And Performance
- 4.18 Freight Pricing Trends

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- 4.19 Freight Tonnage Trends
- 4.20 Infrastructure
- 4.21 Regulatory Framework (Road and Rail)
 - 4.21.1 Indonesia
- 4.22 Regulatory Framework (Sea and Air)
 - 4.22.1 Indonesia
- 4.23 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes 1. Market value in USD for all segments 2. Market volume for select segments viz. freight transport, CEP (courier, express, and parcel) and warehousing & storage 3. Forecasts up to 2029 and analysis of growth prospects)

- 5.1 End User Industry
 - 5.1.1 Agriculture, Fishing and Forestry
 - 5.1.2 Construction
 - 5.1.3 Manufacturing
 - 5.1.4 Oil and Gas, Mining and Quarrying
 - 5.1.5 Wholesale and Retail Trade
 - 5.1.6 Others
- 5.2 Logistics Function
 - 5.2.1 Courier, Express and Parcel
 - 5.2.1.1 By Destination Type
 - 5.2.1.1.1 Domestic
 - 5.2.1.1.2 International
 - 5.2.2 Freight Forwarding
 - 5.2.2.1 By Mode Of Transport
 - 5.2.2.1.1 Air
 - 5.2.2.1.2 Sea and Inland Waterways
 - 5.2.2.1.3 Others
 - 5.2.3 Freight Transport
 - 5.2.3.1 By Mode Of Transport
 - 5.2.3.1.1 Air
 - 5.2.3.1.2 Pipelines
 - 5.2.3.1.3 Rail
 - 5.2.3.1.4 Road
 - 5.2.3.1.5 Sea and Inland Waterways
 - 5.2.4 Warehousing and Storage
 - 5.2.4.1 By Temperature Control
 - 5.2.4.1.1 Non-Temperature Controlled
 - 5.2.4.1.2 Temperature Controlled
 - 5.2.5 Other Services

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 6.4.1 Agility Public Warehousing Company K.S.C.P.

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- 6.4.2 BGR Logistik Indonesia
- 6.4.3 DB Schenker
- 6.4.4 Deutsche Post DHL Group
- 6.4.5 DSV A/S (De Sammensluttede Vognmænd af Air and Sea)
- 6.4.6 Expeditors International
- 6.4.7 FedEx
- 6.4.8 Kerry Logistics Network Limited
- 6.4.9 Kuehne + Nagel
- 6.4.10 Linfox Pty Ltd
- 6.4.11 LOGWIN
- 6.4.12 Ninja Express
- 6.4.13 Nippon Yusen Kabushiki Kaisha
- 6.4.14 Pancaran Group
- 6.4.15 PT ABM Investama Tbk
- 6.4.16 PT Bina Sinar Amity
- 6.4.17 PT Cardig International
- 6.4.18 PT Citrabati Logistik International
- 6.4.19 PT Dunia Express Transindo
- 6.4.20 PT Jalur Nugraha Ekakurir (JNE)
- 6.4.21 PT Kamadjaja Logistics
- 6.4.22 PT Lautan Luas TBK
- 6.4.23 PT Pandu Siwi Group (Pandu Logistics)
- 6.4.24 PT Pos Indonesia
- 6.4.25 PT Samudera Indonesia TBK
- 6.4.26 PT Satria Antarana Prima Tbk (SAP Express)
- 6.4.27 PT Siba Surya
- 6.4.28 PT. Repex Wahana (RPX)
- 6.4.29 Puninar Logistics
- 6.4.30 Sinotrans Limited
- 6.4.31 Soechi Lines
- 6.4.32 United Parcel Service

7 KEY STRATEGIC QUESTIONS FOR FREIGHT AND LOGISTICS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (Market Drivers, Restraints & Opportunities)
 - 8.1.5 Technological Advancements
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms
- 8.7 Currency Exchange Rate

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