

Indonesia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Indonesia Courier, Express, and Parcel (CEP) Market size is estimated at 7.86 billion USD in 2025, and is expected to reach 11.15 billion USD by 2030, growing at a CAGR of 7.24% during the forecast period (2025-2030).

Surging domestic and cross-border demand fuels swift expansion in market opportunities

- In October 2024, DHL Express launched a new direct flight route connecting Hong Kong to Jakarta, Indonesia, enhancing its aviation network. The B737-800 freighter, dedicated to this route, operates four times weekly, landing in Jakarta at 8:00 am local time. This initiative is set to significantly enhance the speed and reliability of intra-Asia Pacific deliveries for businesses and individuals in Indonesia. With a capacity of 20 tons, the B737-800 freighter carries e-commerce and larger shipments from Mainland China, Hong Kong, Japan, Korea, Taiwan, the Philippines, and Vietnam, all routed through Hong Kong's Central Asia Hub.
- Driven by a booming e-commerce landscape, Indonesia's domestic CEP segment has witnessed remarkable growth. The e-commerce market in Indonesia surged from USD 43.3 billion in 2022 to USD 45.28 billion in 2023. Projections indicate this upward trend will persist, with the market poised to reach USD 51.24 billion by 2024. With a forecasted CAGR of 10.41% from 2023 to 2027, the market value is on track to hit USD 67.30 billion by 2027. The e-commerce user base is also expanding, with estimates suggesting a reach of 244.7 million users by 2027. User penetration, recorded at 70.8% in 2023, is expected to rise to 85.5% by 2027.

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The transportation and storage sector expected to witness boost in GDP contributions, fueled by rising infrastructure projects

- In May 2024, the Japanese government extended a loan of approximately JPY140.7 billion (USD 900 million) for the construction of a high-speed rail line in Jakarta, Indonesia. Spanning 84.1 km, the East-West rail project will be executed in two phases, commencing in 2026 and concluding by 2031. The rail line will incorporate advanced Japanese technology for both trains and signaling systems. These initiatives are poised to enhance the GDP contribution from the transport and storage sector.
- Transportation is at the forefront of the nation's infrastructure expansion efforts. In this domain, ongoing and upcoming initiatives allocate 29% of their overall value to road projects, 22% to rail, and 23% to port infrastructure. These projects are crucial for enhancing connectivity and boosting economic growth. A significant undertaking in Indonesia is the Lhokseumawe to Langsa Toll Road, spanning 135 km. Commencing in early 2024, this ambitious project is slated for completion by late 2027, with the goal of alleviating traffic congestion and shortening travel times. This toll road will be instrumental in optimizing logistics and boosting the transport and storage sector's contribution to GDP.

Indonesia faced fiscal challenges amid surging crude oil prices and subsidy pressures in 2022, however the rates remained unchanged till 2024

- In November 2024, Indonesia reformed its fuel subsidy system. The new president is targeting a reduction in subsidies, which constituted roughly 16% of government spending in 2023. While the subsidy for LPG will stay the same, the government is still determining adjustments for fuel and electricity subsidies. Indonesia's energy subsidies help keep inflation low but expose the nation to global oil price swings. The government plans to replace these subsidies with cash transfers for needy families, aiming to save about USD 12.99 billion through more targeted support.
- As of June 2024, the Indonesian Ministry of Energy and Mineral Resources (ESDM) was drafting regulations to provide incentives and tax relief for green hydrogen developers to boost the industry's growth. ESDM aimed to produce 9.9 million tons of hydrogen per year by 2060 to meet the needs of industry (3.9 Mtpa), transportation (1.1 Mtpa), electricity (4.6 Mtpa), and household gas networks (0.28 Mtpa). These sectors could also become export commodities.

Indonesia Courier, Express, and Parcel (CEP) Industry Overview

The Indonesia Courier, Express, and Parcel (CEP) Market is fragmented, with the major five players in this market being FedEx, J&T Express, Ninja Van (including Ninja Express), PT Citra Van Titipan Kilat (TIKI) and PT Jalur Nugraha Ekakurir (JNE Express) (sorted alphabetically).

Additional Benefits:

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

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