

## **Indonesia Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Indonesia Freight and Logistics Market size is estimated at 131.2 billion USD in 2025, and is expected to reach 178.1 billion USD by 2030, growing at a CAGR of 6.29% during the forecast period (2025-2030).

Government investments in Indonesia's infrastructure are set to drive the market's growth

- In October 2024, FedEx inaugurated a new gateway facility in Denpasar, Bali, Indonesia. This move aims to streamline shipping processes, enhance delivery times, and provide services tailored to the distinct needs of Denpasar's exporters. FedEx highlighted that customers can expect quicker and more dependable shipping services, with exports now being routed directly from Denpasar to Singapore, bypassing the previous route through Jakarta. Additionally, the facility provides comprehensive logistics services for Class 9 dangerous goods, including solid dry ice and items with anesthetic properties.
- For Fiscal Year (FY) 2025, the Highways Directorate General of the Public Works and Housing (PUPR) Ministry allocated a budget ceiling of USD 2.10 billion. Meanwhile, the 2025 Draft State Budget (RAPBN) proposes a total budget ceiling of USD 4.91 billion for the PUPR Ministry. Within this allocation, the Highways Directorate General designates USD 0.66 billion for road infrastructure, USD 0.34 billion for bridge infrastructure, and USD 0.58 billion for the preservation and maintenance of national roads and bridges

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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 Freight and Logistics Industry Overview

The Indonesia Freight and Logistics Market is fragmented, with the major five players in this market being J&T Express, Ninja Van (including Ninja Express), NYK (Nippon Yusen Kaisha) Line, PT Jalur Nugraha Ekakurir (JNE Express) and PT Samudera Indonesia Tangguh (sorted alphabetically).

#### Additional Benefits:

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

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