

Indonesia Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Indonesia Road Freight Transport Market size is estimated at 53.88 billion USD in 2025, and is expected to reach 72.25 billion USD by 2030, growing at a CAGR of 6.04% during the forecast period (2025-2030).

Wholesale and retail trade, along with manufacturing, are leading the growth of the market

- Indonesia's retail sector stands out as one of the most promising in Asia, bolstered by its vast population, an expanding middle class with increased purchasing power and evolving modern spending habits. In July 2024, retail sales in Indonesia surged by 4.5% YoY, a notable leap from June's 2.7% uptick. This uptick not only marked the third straight month of rising retail turnover but also represented the swiftest pace since March. The momentum was largely driven by ongoing government cash transfers, which bolstered consumer spending. Notably, food sales saw a robust 6.5% increase in July 2024. This uptick in retail sales subsequently spurred a heightened demand for road freight services.
- In Indonesia, the agriculture sector is poised for growth, especially with the infusion of technology. The Ministry of Agriculture, through its Agricultural Quarantine Agency (Barantan), unveiled the "Agro Gemilang" initiative, dubbed "Let's Encourage Exports of the Nation's Millennial Generation," to bolster agricultural exports in the years ahead. Furthermore, Indonesia is targeting a nearly 300% increase in sugar production by 2030, with aspirations of self-sufficiency and bolstering its bioethanol objectives.

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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 Road Freight Transport Industry Overview

The Indonesia Road Freight Transport Market is fragmented, with the major five players in this market being NYK (Nippon Yusen Kaisha) Line, Pancaran Group, PT ABM Investama TBK (including PT Cipta Krida Bahari), PT Repex Wahana (RPX) and PT Siba Surya (sorted alphabetically).

Additional Benefits:

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

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