



Indonesia Road Freight Vehicle Market

Analysis of New Vehicle Sales Data 2010-2021

June 2022



On behalf of:



of the Federal Republic of Germany

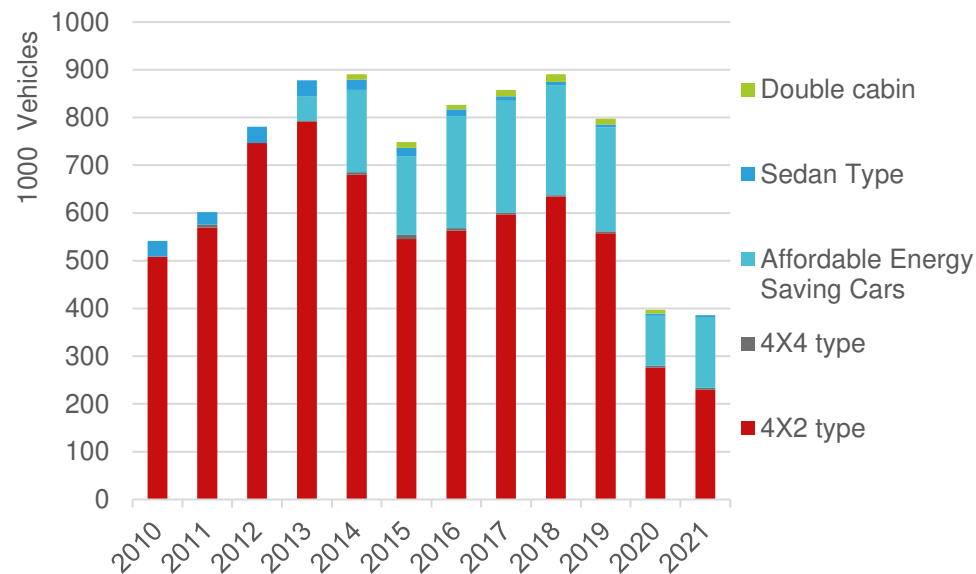


Context

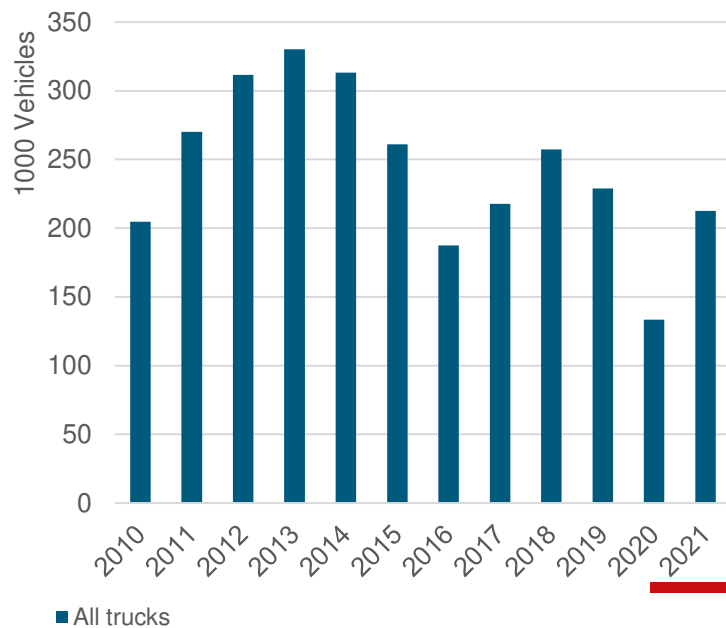
- This analysis was done within the framework of the **TRANSfer III project** which is implemented by GIZ and funded by the International Climate Initiative (IKI) of the German Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU). The issue of truck fleet modernisation has been one of the cooperation areas of the project's Indonesia country component. For more information, see <https://changing-transport.org/publication/truck-fleet-modernization-in-indonesia/>
- The analysis is based on a database which we build with annual vehicle sales data available from the website of the Association of Indonesia Automotive Industries (**Gaikindo**) www.gaikindo.or.id. It follows guidance from the [Freight Assessment Blueprint](#) by the International Council of Clean Transportation (ICCT).
- This analysis is meant to provide the **Ministry of Transportation** of Indonesia, as the project's main counterpart, as well as other interested stakeholders with insights into the market of freight vehicles in Indonesia. We believe that the information can be a useful baseline for green freight initiatives in Indonesia.

Freight versus passenger vehicle sales trend in Indonesia

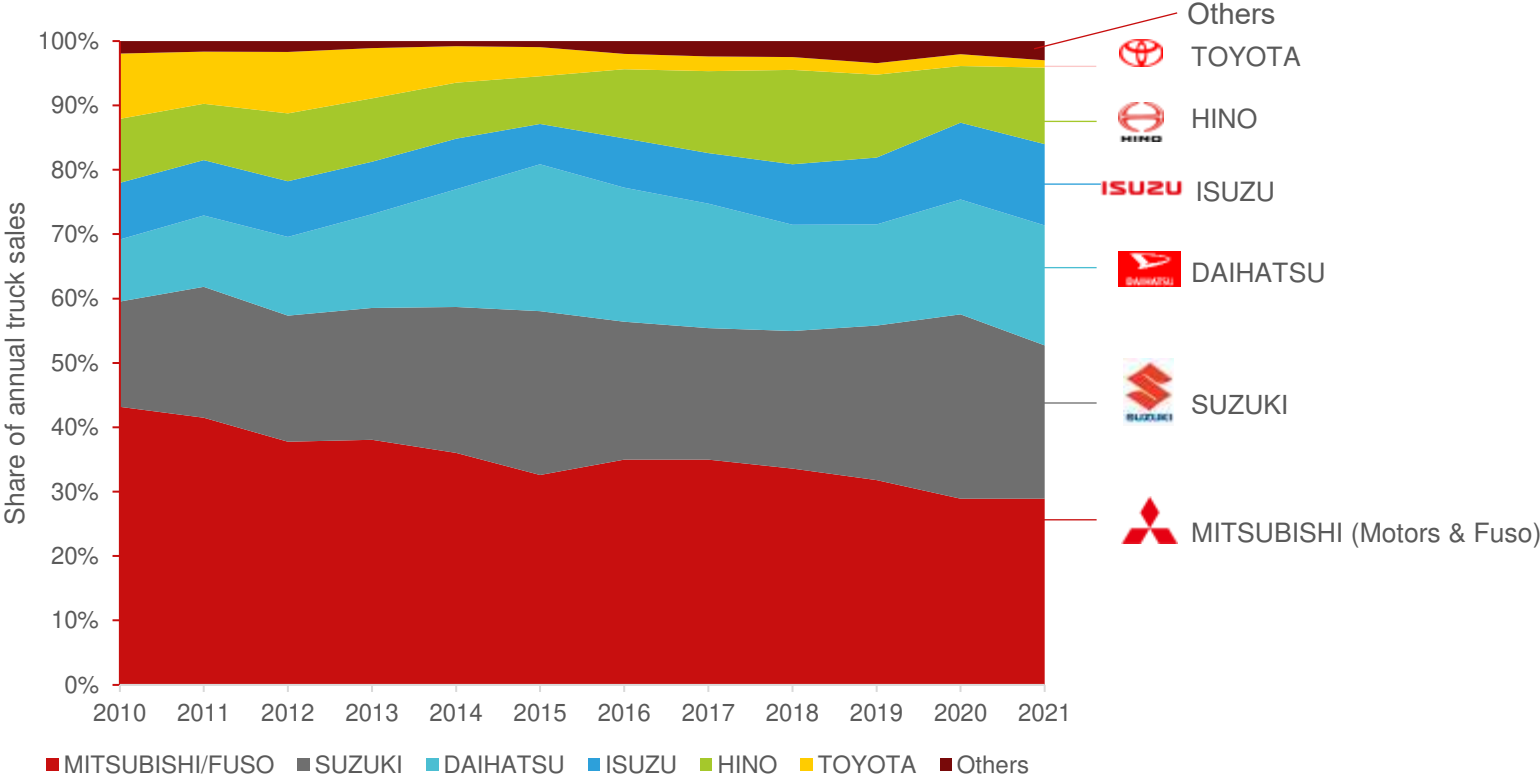
No recovery of passenger vehicle sales in 2021



Strong recovery of freight vehicle market in 2021

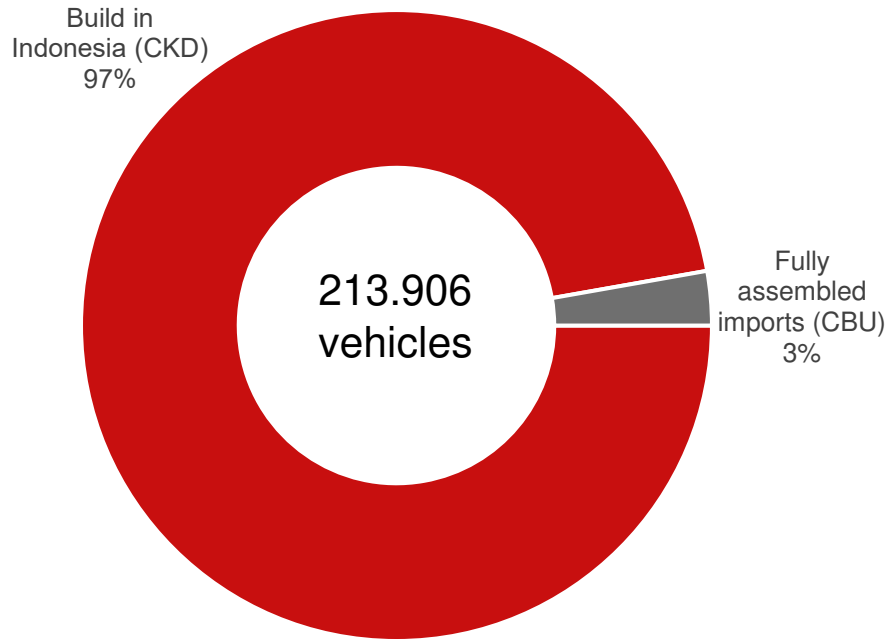


Japanese Brands dominate the freight vehicle market

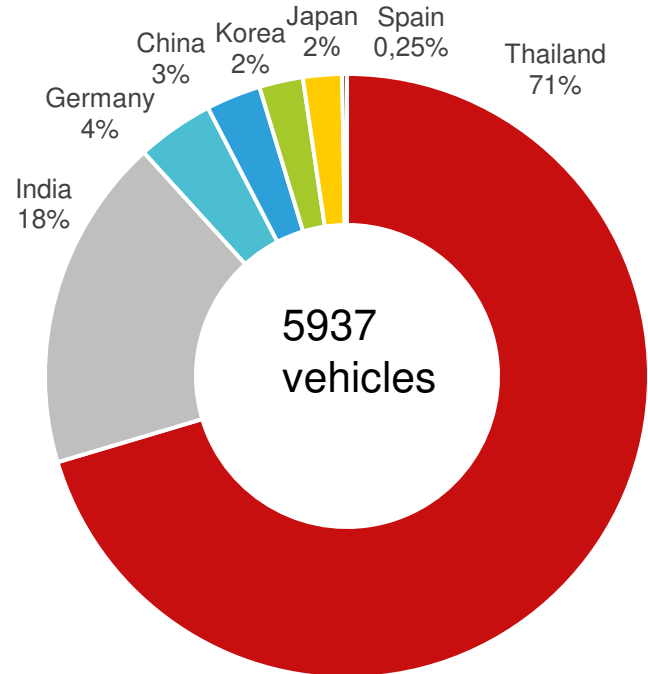


Most Freight Vehicles are Build in Indonesia

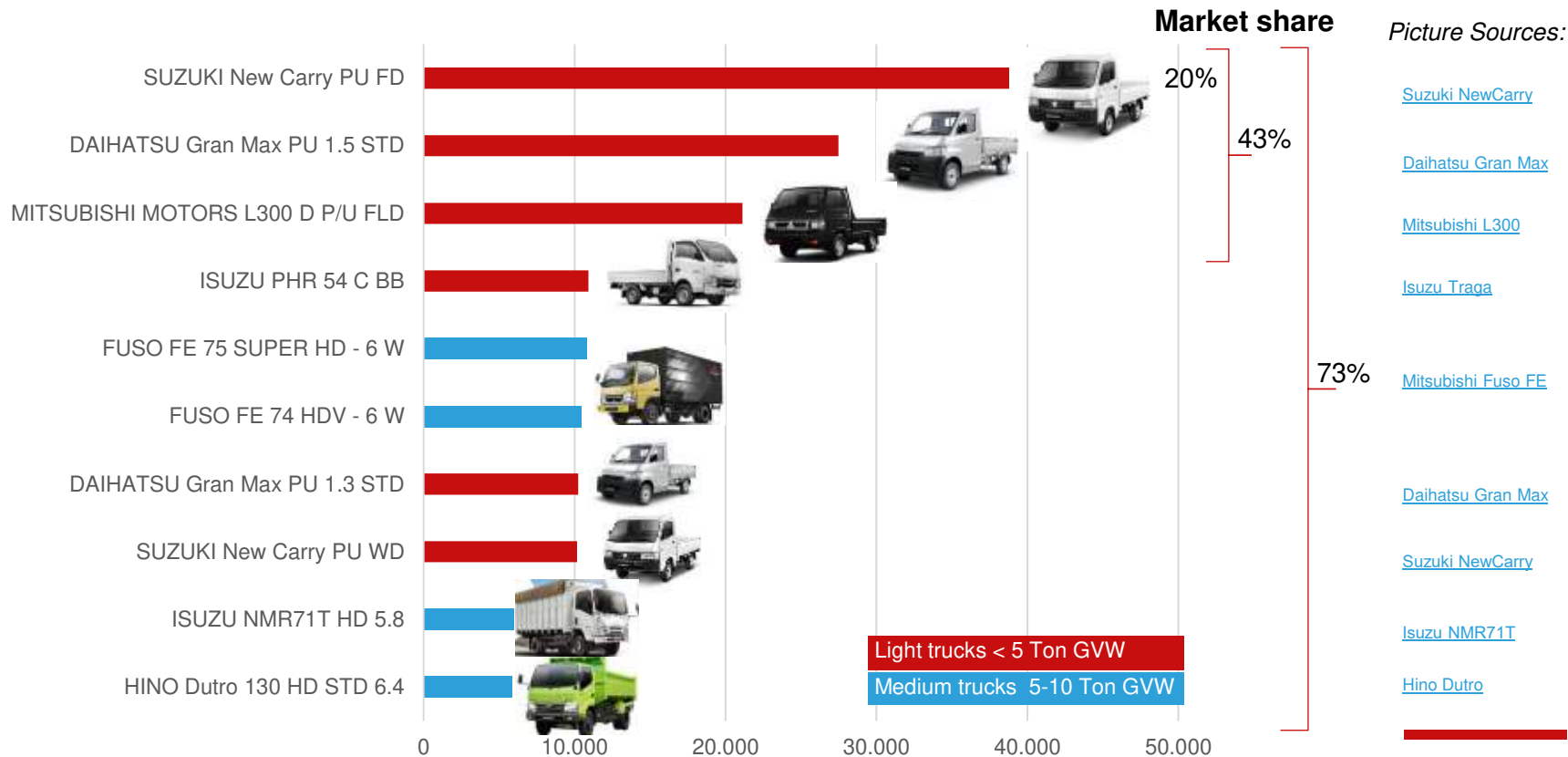
Local assembly vs completely build imports (2021)



Import origin countries (2021)

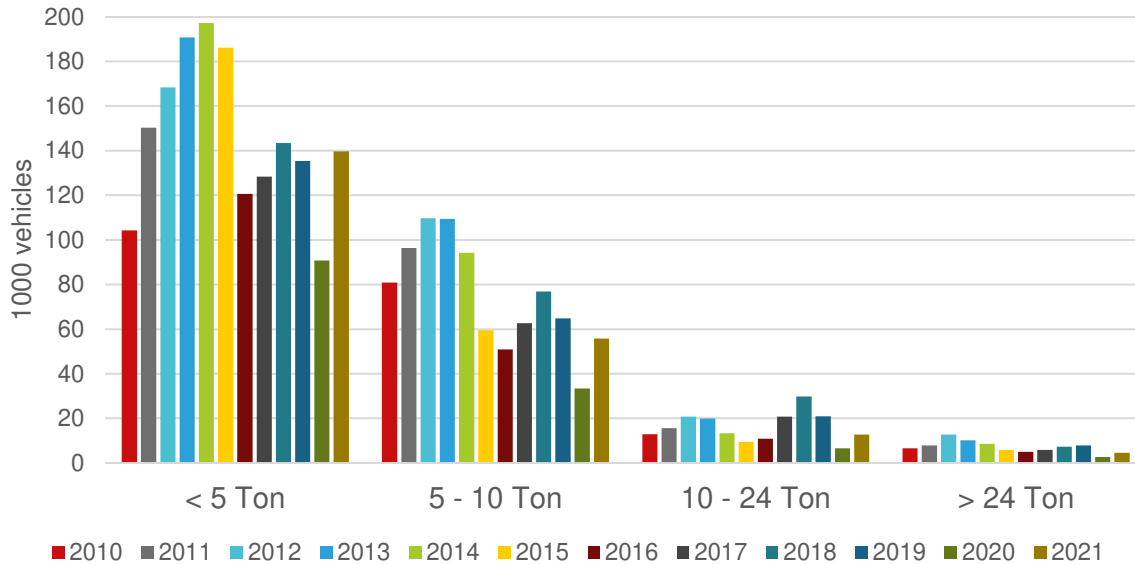


Indonesia's 10 bestselling truck models in 2021

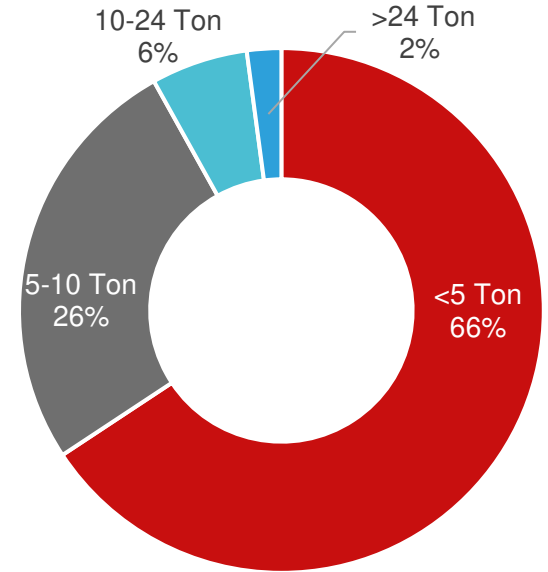


Light pick-up trucks are the most popular segment

Sales trend by vehicle weight class (GVW)

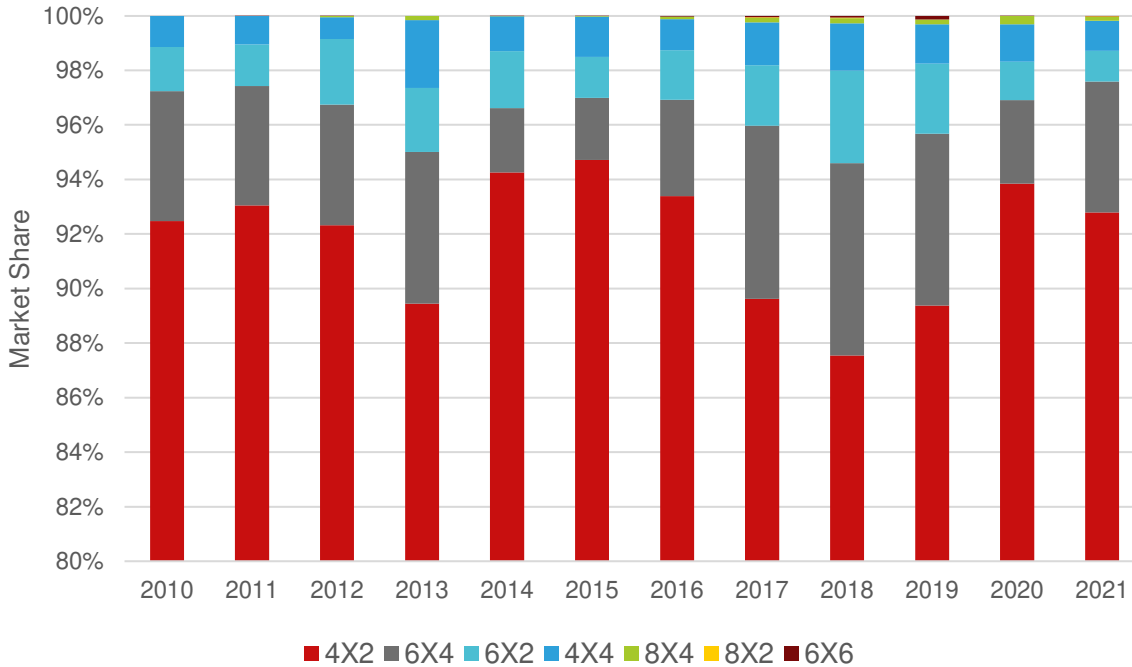


Distribution of sales in 2021

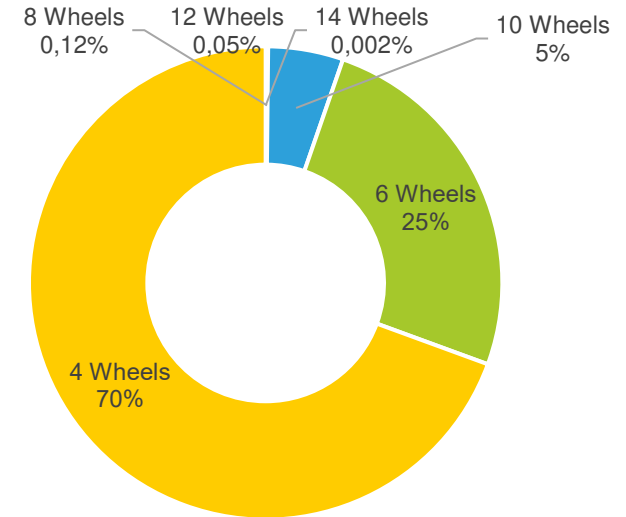


>90% market share for 2 axle trucks

Historical trend of driveline configuration

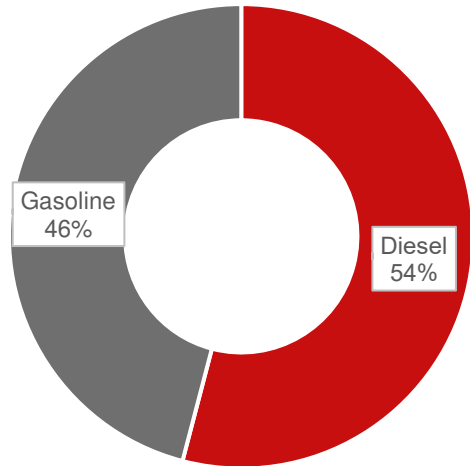


Sales Distribution by Number of Wheels (2021)

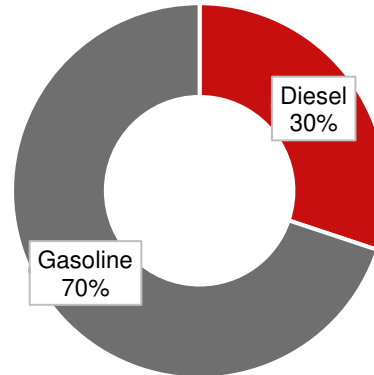


Diesel fuel dominates, yet most light trucks run on gasoline

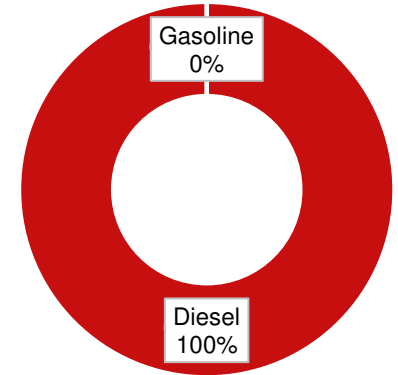
Fuel type of new trucks in Indonesia (2021)



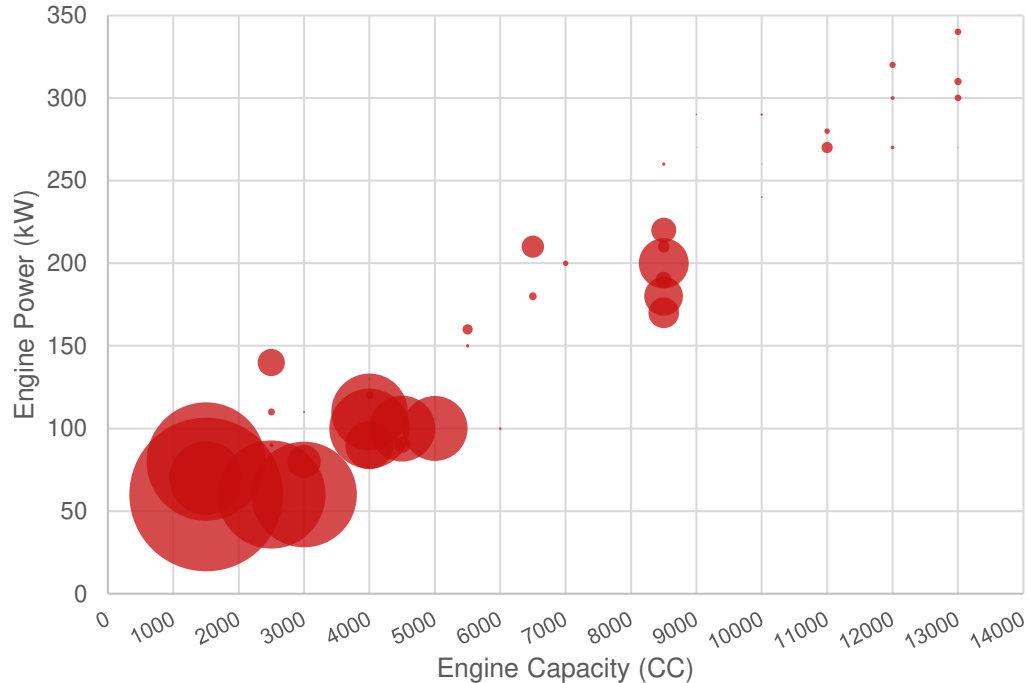
Light Trucks (Pick-Ups)



Medium and Heavy Trucks

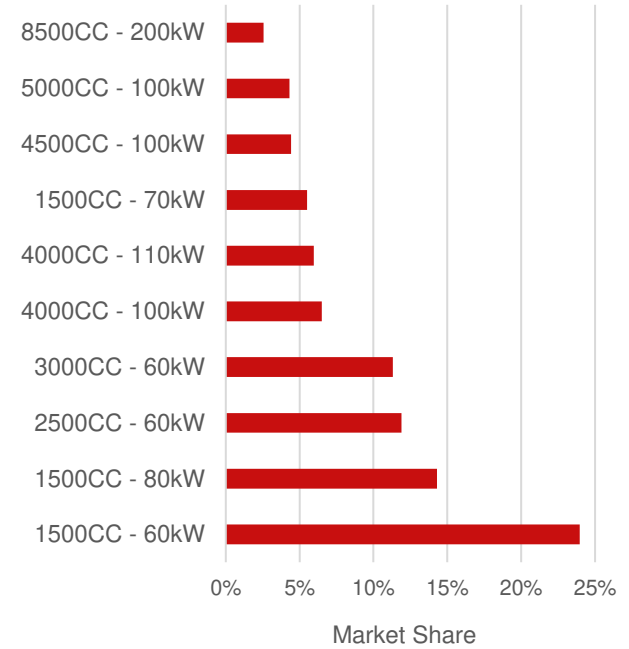


Engine Size and Power of Trucks in Indonesia



Note: The size of the bubble represents the number of new freight vehicles sold in 2021 with a specific combination of CC and kW parameters

10 most popular truck engine configurations in 2021



Emission Standards and Fuel Consumption

Note: The Vehicle Sales Data by the Gaikindo Association does not provide information on the emission standard and on the fuel consumption of vehicles. We therefore searched the websites of the vehicle manufacturers and of their local sales agents for suitable information on the emission standard and average fuel consumption of the topselling vehicles. As we compiled the fuel consumption data from a variety of sources, the values need to be treated with caution and are approximate at best.

- **Emission Standard**

- The 10 bestselling truck models **are all ready for Euro4** . Thus, they are compliant with the respective Ministry of Environment Regulation effective since April 12, 2022.

- **Fuel Consumption**

- **Light trucks:** The advertised fuel consumption of the 7 most sold pick-up trucks (representing 90% of all pick-up sales in 2021) ranges from 6,8 L/100km to 8,4 L/100km. The sales-weighted **average fuel consumption is 7,69 L/100km**
- **Medium trucks & Heavy trucks:** *Not calculated to due to limited data availability*

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