Indonesia Road Freight Vehicle Market
Analysis of New Vehicle Sales Data 2010-2021
June 2022
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.
No recovery of **passenger vehicle** sales in 2021

Strong recovery of **freight vehicle** market in 2021

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
Japanese Brands dominate the freight vehicle market

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
Most Freight Vehicles are Build in Indonesia

Local assembly vs completely build imports (2021)

- Build in Indonesia (CKD) 97%
- Fully assembled imports (CBU) 3%

213,906 vehicles

Import origin countries (2021)

- Thailand 71%
- India 18%
- Germany 4%
- China 3%
- Korea 2%
- Japan 2%
- Spain 0.25%

5937 vehicles

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
Indonesia’s 10 bestselling truck models in 2021

- **DAIHATSU Gran Max PU 1.5 STD**
- **MITSUBISHI MOTORS L300 D P/U FLD**
- **ISUZU PHR 54 C BB**
- **FUSO FE 75 SUPER HD - 6 W**
- **FUSO FE 74 HDV - 6 W**
- **DAIHATSU Gran Max PU 1.3 STD**
- **SUZUKI New Carry PU WD**
- **ISUZU NMR71T HD 5.8**
- **HINO Dutro 130 HD STD 6.4**
- **SUZUKI New Carry PU FD**

**Market share**

- **43%**
- **73%**
- **20%**

**Light trucks < 5 Ton GVW**
- **SUZUKI New Carry PU FD**
- **DAIHATSU Gran Max PU 1.5 STD**
- **ISUZU PHR 54 C BB**

**Medium trucks 5-10 Ton GVW**
- **MITSUBISHI MOTORS L300 D P/U FLD**
- **FUSO FE 75 SUPER HD - 6 W**
- **FUSO FE 74 HDV - 6 W**

**Picture Sources:**
- Suzuki NewCarry
- Daihatsu Gran Max
- Mitsubishi L300
- Isuzu Traga
- Mitsubishi Fuso FE
- Daihatsu Gran Max
- Suzuki NewCarry
- Isuzu NMR71T
- Hino Dutro
- Mitsubishi Fuso FE
- Daihatsu Gran Max
- Suzuki NewCarry

*Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022*
Light pick-up trucks are the most popular segment

Sales trend by vehicle weight class (GVW)

Distribution of sales in 2021

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
>90% market share for 2 axle trucks

Historical trend of driveline configuration

Sales Distribution by Number of Wheels (2021)

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
Diesel fuel dominates, yet most light trucks run on gasoline

Fuel type of new trucks in Indonesia (2021)

- **Diesel**: 54% (Medium and Heavy Trucks)
- **Gasoline**: 46% (Medium and Heavy Trucks)
- **Diesel**: 30% (Light Trucks (Pick-Ups))
- **Gasoline**: 70% (Light Trucks (Pick-Ups))
- **Gasoline**: 0% (Light Trucks (Pick-Ups))
- **Diesel**: 100% (Medium and Heavy Trucks)

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
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.

Data Source: Association of Indonesia Automotive Industries (Gaikindo) 2022
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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