

Indonesia Autos Report Q4 2011

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A recovery in the supply chain for Japanese carmakers, coupled with sustained growth in private consumption, resulted in record vehicle sales in Indonesia for the month of July 2011. Moreover, as orders secured during the Indonesia International Motor Show will not be counted until deliveries are made over the coming months, we expect the sales boost to continue for at least the next two months. So far this year, total sales of 506,079 units keep the sector on track to achieve a new record for the country, although BMI's sales forecast has been revised down slightly to growth of 12% in 2011 as sales in the latter months of the year are often slower.

Although our passenger car sales forecast has been lowered slightly to 10% this year, as we recognise July was a month of playing catch up after a period of disruption and therefore these levels may not be sustainable, we are still expect average annual growth of 7-8% in the car segment over our five-year forecast period. This will be largely fuelled by strength in private consumption, which BMI's Asia team expects to outperform the region, at least up to 2012.

We do still expect the commercial vehicle segment to outperform in growth terms, however, and more markedly from 2012 onwards, as infrastructure spending picks up linked to the government's publicprivate partnership scheme. While building projects should generate demand for heavy trucks, an upgrade to the country's transport infrastructure should also provide a boost for bus deliveries, which we believe will result in average annual growth of 10% to 2015.

Nevertheless, investment in the car segment has been stepped up. Toyota Motor has announced investment of US\$200mn to expand the annual production capacity of its plant Karawang, Indonesia, in its first production investment since the earthquake and tsunami, which brought its operations in Japan to a standstill. The project, which will raise the plant's output to 140,000 units per year by 2013, will not only reduce Toyota's dependence on Japan as a production base, but also tap into a vehicle market expected to rival that of neighbouring Thailand over BMI's five-year forecast period. The Indonesian government is also prepared to offer Japanese carmaker Suzuki Motor a package of incentives if it goes through with a plan to invest US\$800mn in local production, suggesting that the government's attitude towards foreign investment is as much of a draw to carmakers as the market's growth potential.

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