

Indonesia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Indonesia Courier, Express, and Parcel (CEP) Market size is estimated at 7.25 billion USD in 2024, and is expected to reach 11.15 billion USD by 2030, growing at a CAGR of 7.45% during the forecast period (2024-2030).

Increasing demand from multiple end-user segments generating CEP demand

E-commerce has been a major driver for domestic and international CEP demand in Indonesia. For instance, electronics, toys, hobby, & DIY, fashion and personal and household care products delivery demand contributed significantly to the CEP market growth. With e-commerce expected to touch USD 67.30 billion by 2027, the CEP demand and volume are also expected to grow significantly.

B2B drives the demand in the CEP market, and B2B spending represented 87.5% of total demand in 2021. The total number of companies operating in the market increased in 2021 to 120,080. The costs of the industry increase by 10.8% in 2021, largely driven by rising labor costs. The industry's profitability increases and stands at 51.5% of turnover in 2021, the third highest regionally. As of 2021, the domestic segment of the courier, express, and parcel market had a larger contribution, when compared to the international segment.

Some major e-commerce players alone generated significant CEP demand in 2022. For instance, the largest player in the Indonesian e-commerce market in 2022 was jd.id. The store generated a revenue of USD 1,810.7 million in 2022. It was followed by

blibli.com and shopee.co.id as the second and third-largest stores, with USD 697.4 million and USD 386.5 million, respectively. Collectively, these top 3 stores accounted for 66.4% of the top 100 online stores' revenue in Indonesia. In alignment with this growth, Indonesian courier services startup J&T Global Express planned to raise up to HK\$3.92 billion (USD 500.97 million) in Hong Kong's second-largest initial public offering (IPO) in 2023.

Indonesia Courier, Express, and Parcel (CEP) Market Trends

Fueled by investment and increased mobility, the transportation and storage sector of Indonesia witnessed a rise by 36.68% YoY in 2022

In 2022, transportation and storage experienced remarkable growth, surging by 36.68% YoY, due to higher community mobility and increased foreign tourist arrivals. The sector continued its rapid expansion in Q1 2023, recording a 15.93% YoY growth rate. During the same period, Indonesia achieved an impressive total investment realization of IDR 328.9 trillion (USD 0.021 trillion), representing 23.5% of its full-year investment target for 2023. Road transport accounted for 44% of the transport sector's GDP contribution, and rail accounted for only 1.4%.

Indonesia's transportation and storage sector is crucial for facilitating the movement of goods, people, and services across the vast archipelago, contributing significantly to the country's economy. In the second quarter of 2022, the transportation and warehousing sector experienced a notable growth rate of 21.27% compared to the same quarter in 2021. Additionally, the first quarter of 2022 saw a positive growth rate of 15.79% in the sector. To enhance the transport and storage sector and support the development of the new Indonesian capital city, the government allocated approximately USD 19.27 million for road infrastructure projects in the Sepaku sub-district, Penajam Paser Utara district.

Indonesia is set to allocate approximately USD 240 billion for infrastructure advancements from 2022 to 2024. Nevertheless, the nation's focus on infrastructure expansion primarily centers around transportation. Within this sector, road, rail, and port infrastructure projects constitute 29%, 22%, and 23%, respectively, of the overall value of ongoing and upcoming infrastructure initiatives. In 2022, the foreign direct investment in vehicle and other transportation industries in Indonesia amounted to approximately USD 1.5 billion.

Indonesia faced fiscal challenges amid surging crude oil prices and subsidy pressures in 2022

The price of the Indonesian crude basket increased to an average of USD 99.4 per barrel between January and April 2022, compared to USD 68.5 per barrel in 2021, recording a 45% increase YoY. In the face of a widening gulf between domestic and international prices, state-owned Pertamina adjusted prices of three non-subsidized, high-grade fuel variants - Pertamina Turbo, Dexlite, and Pertamina Dex. After that, the price of unsubsidized Pertamina rose by 39% to USD 0.83 from April, with the fuel types accounting for 16% of total consumption and the rest of the subsidized fuels. By contrast, the prices of commonly used subsidized variants, Peralite (90) and Premium (88), which accounted for over 80% of consumption, have remained unchanged for the past three years.

In Q1 2022, total subsidies were up by 80% YoY, of which energy subsidies increased by 55% YoY. Compensation due to PT Pertamina amounted to USD 3.3 billion in 2020, of which USD 1.06 billion was pending, alongside USD 4.56 billion for 2021, which might have been much higher than the budgeted USD 9.32 billion in 2022. Assuming a 20% increase in total subsidies and higher compensation toward the state-owned oil player, a cumulative headroom for 0.4% of GDP will be required of this year's math for the country to remain within the -4.85% target.

To reduce growing subsidies, the Indonesian government increased subsidized fuel prices by approximately 30% in September 2022 despite the potential risk of mass protests. The price of subsidized gasoline was raised from IDR 7,650 (USD 1.18) per liter to IDR 10,000 (USD 0.67) per liter, while the price of subsidized diesel rose from IDR 5,150 (USD 0.35) per liter to IDR 6,800 (USD 0.46) per liter.

Indonesia Courier, Express, and Parcel (CEP) Industry Overview

The Indonesia Courier, Express, and Parcel (CEP) Market is fragmented, with the top five companies occupying 35.11%. The major players in this market are J&T Express, Ninja Logistics, PT Garuda Indonesia (Persero) TBK, PT Jalur Nugraha Ekakurir (JNE Express) and PT Pos Indonesia (Persero) (sorted alphabetically).

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