

Indonesia Commercial Vehicle Market By Propulsion (ICE, Electric, Hybrid), By Transmission (Automatic, Manual), By Vehicle Type (Truck, Bus/Van), By Region, By Competition, Opportunities & Forecast, 2020-2030F

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Abstracts

Market Overview:

Indonesia Commercial Vehicle Market was valued at USD 29.32 Billion in 2024 and is expected to reach USD 46.02 Billion by 2030 with a CAGR of 7.80% during the forecast period. The Indonesia commercial vehicle market is set for growth driven by various key factors. As the country's infrastructure continues to improve, there is a notable increase in demand for efficient transportation solutions, especially in logistics and construction sectors. For instance, Indonesia is advancing its infrastructure with a USD 26.6 billion 2025 budget, focusing on projects like the Jakarta–Surabaya High-Speed Rail and the USD 35 billion Nusantara new capital development. The government also aims to build 3 million affordable homes annually to boost connectivity and economic growth. The expansion of the road networks, ports, and logistics hubs supports the rise in freight and goods transportation, fostering greater reliance on commercial vehicles. The growing urbanization and rise in the construction of residential, commercial, and industrial complexes also contribute to the demand for heavy-duty vehicles such as trucks and buses. These sectors require efficient transportation for materials, driving the need for a diverse range of commercial vehicles.

Market Drivers

Infrastructure Development

Indonesia's infrastructure growth fosters improved transportation efficiency, with better roads and logistics hubs enabling faster movement of goods. These advancements support both the long-haul transport of goods and last-mile delivery systems, creating higher demand for commercial vehicles. The road network expansion also drives increased investments in vehicles suitable for new routes. As these projects expand into more remote areas, more vehicles are required to support emerging industries. This creates additional opportunities for commercial vehicle manufacturers and operators. With these enhancements, the transportation sector can meet future demand, ensuring business scalability. For instance, In 2025, PT Nusantara Infrastructure Tbk (META) plans to spend about \$10 million in capital expenditure, mainly for the Elevated Jakarta Outer Ring Road project worth \$1.4 billion, plus fixed asset purchases and infrastructure work. Traffic on the MBZ Elevated Toll Road rose 28.27% during the 2024/2025 holidays.

Key Market Challenges

High Initial Investment Costs

The high upfront cost of purchasing commercial vehicles remains a significant challenge, particularly for smaller businesses. While long-term savings from efficient fuel use and lower maintenance costs are clear, many companies struggle with initial capital outlays. Financing options, including loans or leasing, may help, but the terms and conditions are often restrictive for smaller firms. This financial barrier hinders the growth of smaller fleet owners who wish to invest in modern, efficient vehicles. As these businesses are often the backbone of the logistics sector, addressing the cost issue would lead to broader market expansion. Access to more flexible financing solutions could encourage smaller firms to modernize their fleets, leading to more competition and better service in the commercial vehicle market. The financial constraints experienced by small businesses are a critical factor that needs to be addressed for long-term market sustainability and growth.

Key Market Trends

Adoption of Electric Commercial Vehicles

The increasing emphasis on sustainability is driving the adoption of electric commercial vehicles in Indonesia. As governments and businesses alike seek to reduce carbon footprints, electric vehicles (EVs) offer an eco-friendly alternative to traditional diesel trucks and buses. With lower operating costs primarily from fuel savings and reduced

maintenance requirements electric vehicles are becoming a more attractive option for fleet operators. The introduction of more EV models with longer ranges and faster charging capabilities is expected to accelerate their adoption. The future of commercial vehicles may see a significant shift toward electric options, offering operational savings and environmental benefits for fleet operators. As charging infrastructure improves, EVs could dominate the market in the coming years, contributing to greener and more sustainable transportation solutions. For instance, In July 2024, Hyundai Motor Group and LG Energy Solution launched Indonesia's first EV battery cell plant, HLI Green Power, in Karawang with a 10 GWh annual capacity, enough to power over 150,000 electric vehicles.

Key Market Players

Mitsubishi Motors Krama Yudha Indonesia

PT Astra Daihatsu Motor

PT HINO Indonesia

Suzuki Indonesia

PT. Tata Motors Indonesia

UD Trucks Corp

UD Trucks Corp

Isuzu Astra Motor Indonesia

PT Daimler Commercial Vehicles Indonesia

PT. Maxindo Renault Indonesia

Report Scope:

In this report, the Indonesia Commercial Vehicle Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Indonesia Commercial Vehicle Market By Propulsion (ICE, Electric, Hybrid), By Transmission (Automatic, Manual)...

Indonesia Commercial Vehicle Market, By Propulsion:

ICE

Electric

Hybrid

Indonesia Commercial Vehicle Market, By Transmission:

Automatic

Manual

Indonesia Commercial Vehicle Market, By Vehicle Type:

Truck

Bus/Van

Indonesia Commercial Vehicle Market, By Region:

Java

Sumatra

Sulawesi

Kalimantan

Rest of Indonesia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Indonesia Commercial Vehicle Market.

Available Customizations:

Indonesia Commercial Vehicle Market By Propulsion (ICE, Electric, Hybrid), By Transmission (Automatic, Manual)...

Indonesia Commercial Vehicle Market report with the given market data, TechSci Research offers customizations according to the company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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