



**Asia-Pacific
Economic Cooperation**

2014/AD1/051
Agenda Item: 3

Indonesia Automotive Industry: Report on 2013 Auto Market

Purpose: Information
Submitted by: Indonesia



**20th Automotive Dialogue
Beijing, China
22-25 April 2014**



INDONESIA AUTOMOTIVE INDUSTRY

REPORT ON 2013 AUTO MARKET

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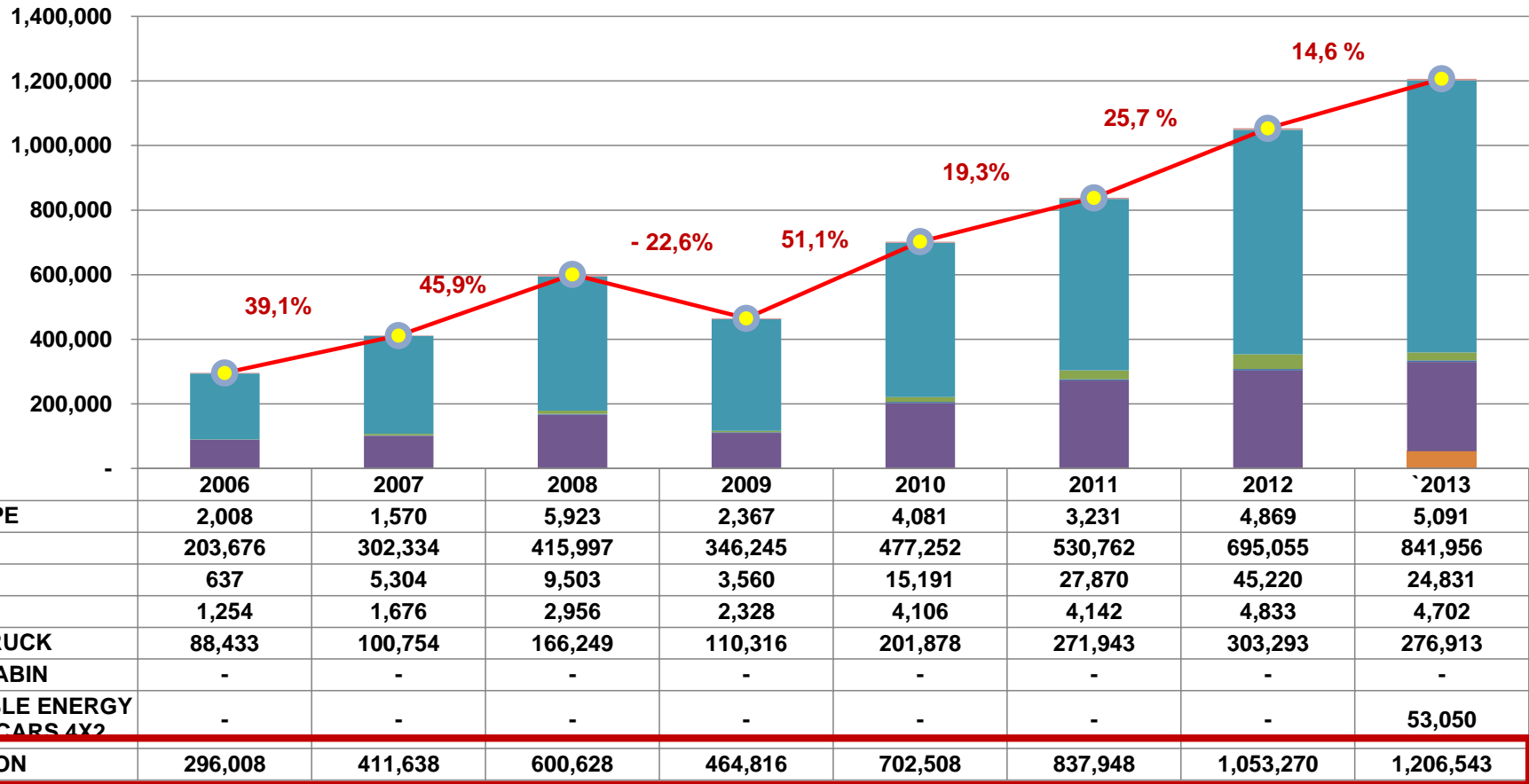
THE 20th APEC AUTOMOTIVE DIALOGUE

Beijing, 23 – 25 April 2014

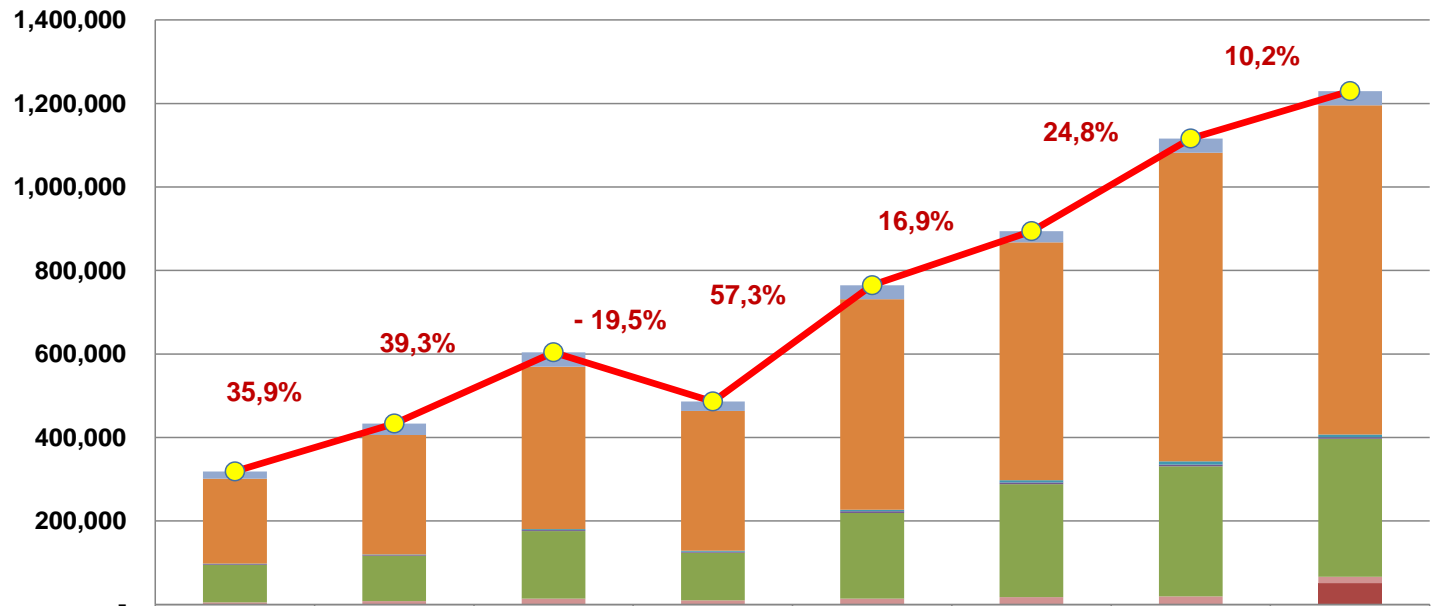
PRESENTATION OUTLINE

- I DOMESTIC PRODUCTION 2006 – 2013
- II DOMESTIC MARKET 2006 – 2013
- III DOMESTIC PRODUCTION 2012 – 2013 (MONTHLY)
- IV DOMESTIC MARKET 2012 – 2013 (MONTHLY)
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DOMESTIC AUTO PRODUCTION BY CATEGORY 2006 – 2013



DOMESTIC AUTO MARKET & EXIM BY CATEGORY 2006 – 2013

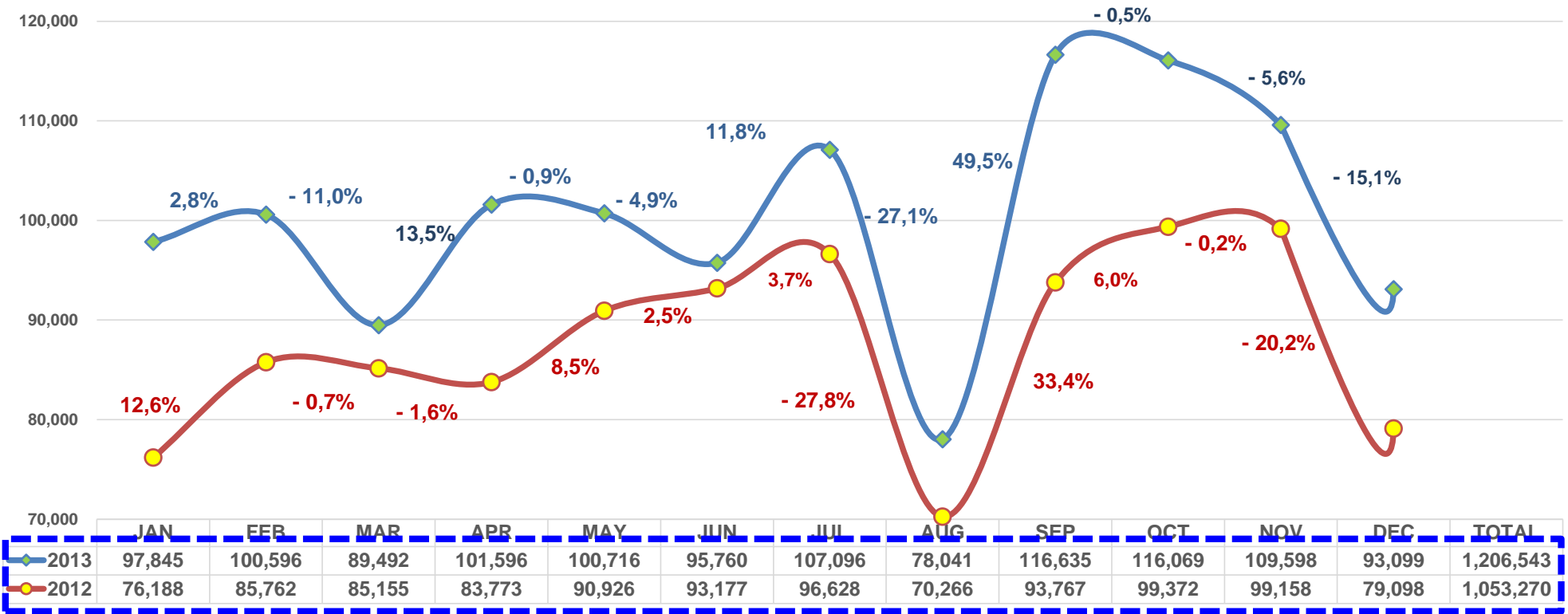


	2006	2007	2008	2009	2010	2011	2012	2013
SEDAN TYPE	17,565	27,381	34,300	22,100	33,128	26,548	34,221	34,193
4X2 TYPE	203,634	285,733	388,790	335,053	504,510	569,860	739,168	788,148
4X4 TYPE	1,188	1,655	2,177	2,214	3,837	5,574	7,396	6,511
BUS	1,561	1,700	2,861	2,597	4,177	4,162	4,472	4,054
PICK UP/TRUCK	89,540	108,558	161,747	114,155	204,654	270,205	311,609	330,289
DOUBLE CABIN	5,416	8,314	13,899	9,969	14,404	17,815	19,364	15,436
AFFORDABLE ENERGY SAVING CARS 4X2	-	-	-	-	-	-	-	51,180
DOMESTIC SALES	318,904	433,341	603,774	486,088	764,710	894,164	1,116,230	1,229,811

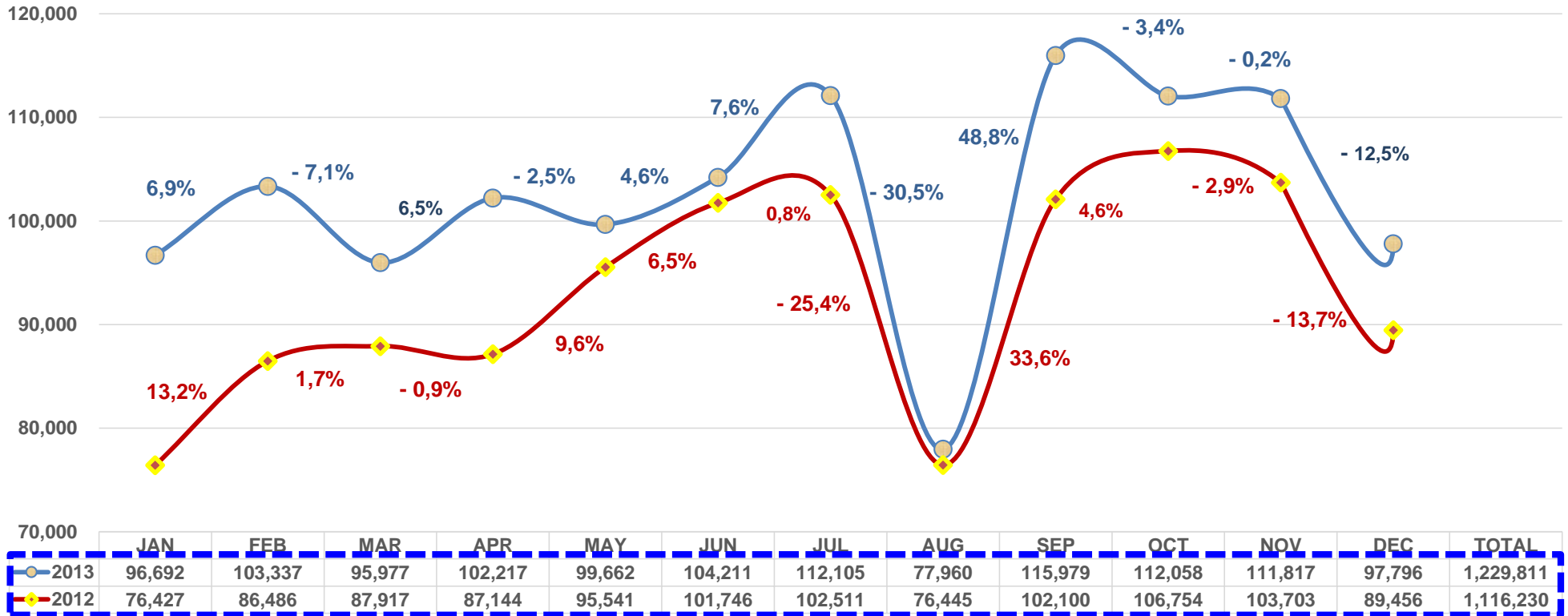
	2006	2007	2008	2009	2010	2011	2012	2013
CBU EXPORT (UNITS)	30,974	60,267	100,982	56,669	85,796	107,932	173,371	170,958

CBU IMPORT (UNITS)	33,663	55,112	72,646	32,678	76,520	76,173	124,835	153,920
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DOMESTIC AUTO PRODUCTION 2012 – 2013 (MONTHLY)



DOMESTIC AUTO MARKET 2012 – 2013 (MONTHLY)



DOMESTIC MARKET & PRODUCTION BY BRAND 2013

MARKET

NO.	BRAND	SALES 2013	SHARE %
1	TOYOTA	434.232	35,3%
2	DAIHATSU	185.942	15,1%
3	SUZUKI	164.004	13,3%
4	MITSUBISHI	157.352	12,8%
5	HONDA	91.493	7,4%
6	NISSAN	61.119	5,0%
7	HINO	34.207	2,8%
8	ISUZU	31.527	2,6%
9	CHEVROLET	15.649	1,3%
10	K I A	12.121	1,0%
11	MAZDA	11.239	0,9%
12	FORD	9.907	0,8%
13	MERCEDES BENZ	4.877	0,4%
14	HYUNDAI	3.869	0,3%
15	B M W	2.460	0,2%
16	UD TRUCKS	1.965	0,2%
17	VOLKSWAGEN	1.377	0,1%
18	SUBARU	1.210	0,1%
19	PROTON	1.088	0,1%
20	LEXUS	622	0,1%
21	JEEP	576	0,0%
22	GEELY	498	0,0%
23	MINI	460	0,0%
24	FAW	428	0,0%
25	AUDI	410	0,0%
26	DODGE	318	0,0%
27	PEUGEOT	270	0,0%
28	MAN TRUCK	185	0,0%
29	TATA	99	0,0%
30	SMART	96	0,0%
31	LAND ROVER	94	0,0%
32	FOTON	71	0,0%
33	JAGUAR	56	0,0%
34	RENAULT (PC)	37	0,0%
35	VOLVO	19	0,0%
36	INFINITI	16	0,0%
37	CHRYSLER	8	0,0%
38	HYUNDAI TRUCK	-	0,0%
39	CHERY	-	0,0%
GRAND TOTAL		1.229.901	100%
CUMULATIVE			

PRODUCTION

NO.	BRAND	PROD 2013	SHARE %
1	TOYOTA	489.233	40,5%
2	SUZUKI	179.821	14,9%
3	DAIHATSU	178.808	14,8%
4	MITSUBISHI	129.314	10,7%
5	HONDA	81.588	6,8%
6	NISSAN	59.787	4,9%
7	HINO	34.411	2,8%
8	ISUZU	29.187	2,4%
9	CHEVROLET	15.720	1,3%
10	MERCEDES BENZ	3.410	0,3%
11	B M W	2.544	0,2%
12	UD TRUCKS	1.938	0,2%
13	HYUNDAI (PC)	1.223	0,1%
14	VOLKSWAGEN	901	0,1%
15	AUDI	210	0,0%
16	GEELY	116	0,0%
17	CHERY	-	0,0%
18	PEUGEOT	-	0,0%
GRAND TOTAL		1.208.211	100%
CUMULATIVE			

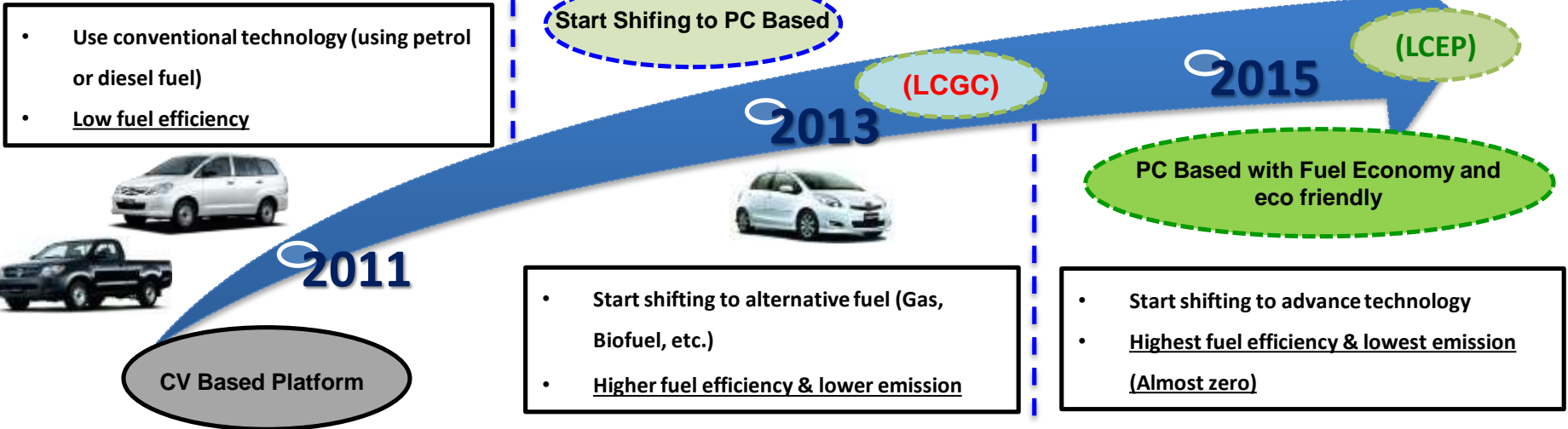
PC : Passenger Cars

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INDONESIA AUTO INDUSTRY ROADMAP

Item	LCGC (Low Cost Green Car)	LCEP (Low Carbon Emission Program)
Fuel Economy	> 20 km/L (NEDC: New European Driving Cycle)	
Target Vehicle Type	<ul style="list-style-type: none"> • Petrol Car: 1.0 - 1.2 L • Diesel Car: 1.0 - 1.5 L 	<ul style="list-style-type: none"> • Passenger cars • PV, DV, HV, EV, alternative fuel vehicles
Tax Break	<ul style="list-style-type: none"> • 0% Lux Tax incentive 	<ul style="list-style-type: none"> • FE 20 - 28 km/L: 25% Lux Tax incentive • FE > 28 km/L: 50% Lux Tax incentive
Price Condition	<ul style="list-style-type: none"> • OFR price = 95 Mio IDR • Excluding ownership transfer fee, vehicle tax, and local tax) 	Not applicable

LCEP?



IDN Govt's grand plan in auto industry with **LCGC** and **LCEP** programs

POLICY ON LUXURY TAX 2014

NO	CATAGORY	PASSENGER	ENGINE SIZE (CC)	FUEL	L.TAX	REMARK	
					(%)		
I	SEDAN / STATION WAGON	< 10 pax	< 1.500	P / D	30	GOV.REG. 22/2014	
			1.500 - 3.000	P	40		
			1.500 - 2.500	D	40		
			>'3.000	P	125		
			>'2.500	D	125		
II	PASSENGER CAR (MPV, 4 x 2)	< 10 pax	< 1.500	P / D	10		
			1.500 cc - 2.500	P / D	20		
			2.500 - 3.000	P	40		
			>'3.000	P	125		
			>2.500	D	125		
III	PASSENGER CAR (SUV, 4 x 4)	< 10 pax	< 1.500	P / D	30		
			1.500 cc - 3.000	P	40		
			1.500 - 2.500	D	40		
			>'3.000	P	125		
			>'2.500	D	125		
IV	BUSES	10 - 15pax	All CC	P / D	10		
		> 15 pax	All CC	P / D	0		
V	TRUCKS	-	All GVW	P / D	0		
VI	DOUBLE CABIN (4 x 2 / 4 x 4)	> 3 pax	All CC	P / D	20		
			GVW < 5 ton				
VII	SPECIAL PURPOSE MOTOR VEHICLES	-	-	-		Note : 1. P = Petrol, D=Diesel 2. L.Tax = Luxury Tax (%)	
	7.1 GOLF CARS						50
	7.2 SNOW CARS/MOUNTAIN CARS/BEACH CARS						60

INCENTIVE POLICY ON ENERGY SAVING MOTOR VEHICLES

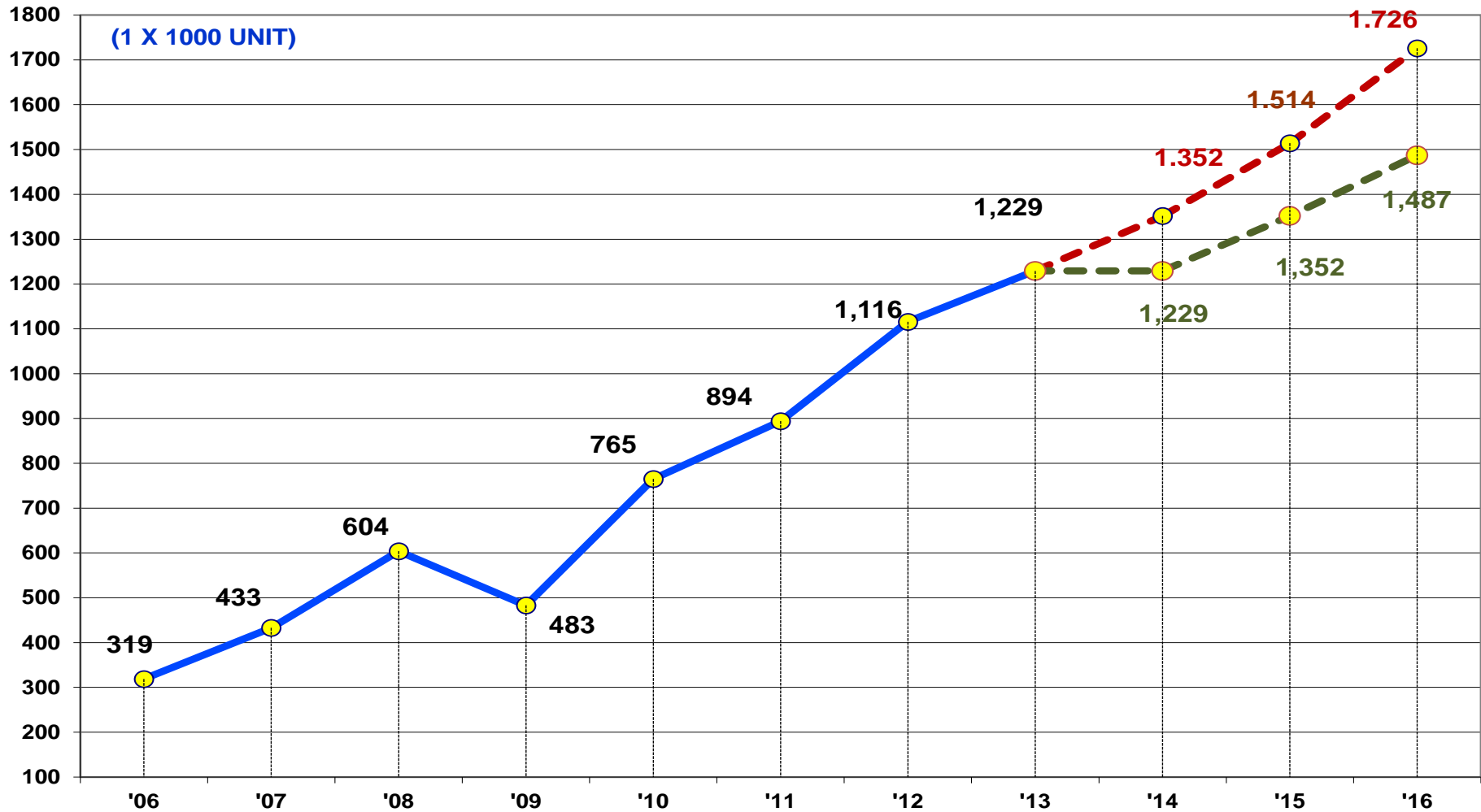
NO	CATAGORY	ENGINE	FUEL CONSUMPTION	LUXURY TAX
1	1. SEDAN / STATION WAGON 2. 4 X2 3. 4X4 4. DOUBLE CABIN 5. BUS	a. Advance Diesel / Petrol Engine b. Dual Fuel Petrol - Gas Engine (CNG / LGV) Converter Kit. c. Bio Fuel Engine d. Hybrid Engine e. CNG / LGV Dedicated Engine	20 - 28 km / lt (Fosil Fuel)	75 % Sales Price
2	1. SEDAN / STATION WAGON 2. 4 X2 3. 4X4 4. DOUBLE CABIN 5. BUS	a. Advance Diesel / Petrol Engine b. Dual Fuel Petrol - Gas Engine (CNG/LGV) Converter Kit. c. Bio Fuel Engine d. Hybrid Engine e. CNG / LGV Dedicated Engine	> 28 km / lt (Fosil Fuel)	50 % Sales Price
3	Affordable Energy saving Vehicles (Not Including Sedan / Station Wagon)	UP TO 1200 CC	20 km / lt Petrol	0 % Sales Price
		UP TO 1500 CC	20 km / lt (Diesel/ Semi Diesel)	

INSTALLED CAPACITY 2014

NO	CAPACITY 2013	TOTAL
1	CAPACITY 2013	1.368.131
2	NEW INVESTEMENT	630.000
3	CAPACITY 2014	1.998.131



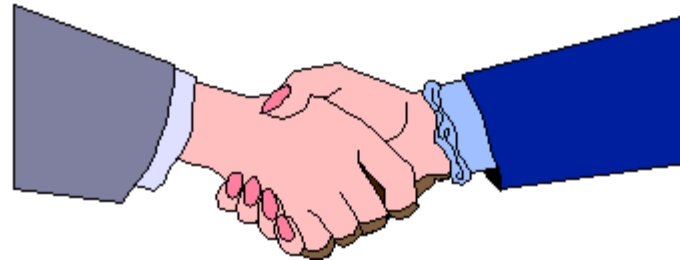
DOMESTIC MARKET & FORECAST 2006 – 2016*



NOTE :
 2014 / 2013 : 10 %
 2015 / 2014 : 12 %
 2016 / 2015 : 14 %



Thank You



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