

TGMS Monthly Indonesia Market Analysis

CY2025 November - Lite Edition

Executive Summary

Wholesale:

CY25/11	VS. Oct	VS. CY24	CY25YTD	YOY%
74,252	0.3%	-0.8%	710,084	-9.6%

Import:

CY25/11	VS. Oct	VS. CY24	CY25YTD	YOY%
15,914	-28.5%	66.0%	151,495	66.3%

Production:

CY25/11	VS. Oct	VS. CY24	CY25YTD	YOY%
92,097	-9.8%	-8.3%	1,090,647	-4.1%

Export:

CY25/11	VS. Oct	VS. CY24	CY25YTD	YOY%
46,920	3.4%	26.4%	473,963	10.6%

Wholesale: 74k (MoM +0.3%, YoY -0.8%)

Import: 16k (MoM -28.5%, YoY +66%)

Production: 92k (MoM -9.8%, YoY -8.3%)

Export: 47k (MoM +3.4%, YoY +26.4%)

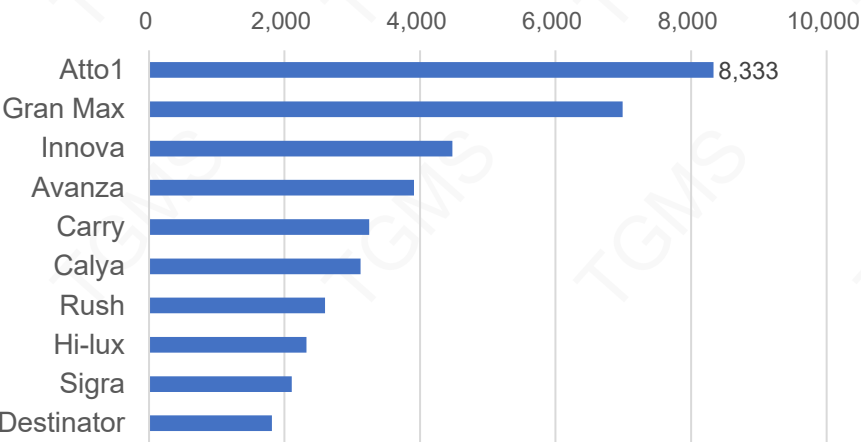
Highlight:

- Production downturn continued, even with a partial offset from exports.
- Wholesale fell 10% YoY, despite a significant increase in imports.

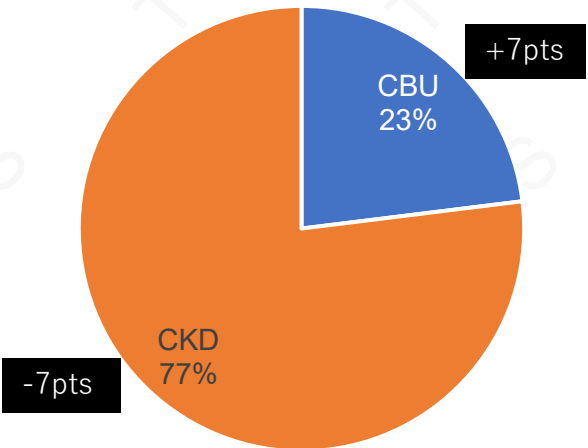
Wholesale (CY25 November Snapshot)

CY25/11	VS. Oct	VS. CY24
74,252	0.3%	-0.8%

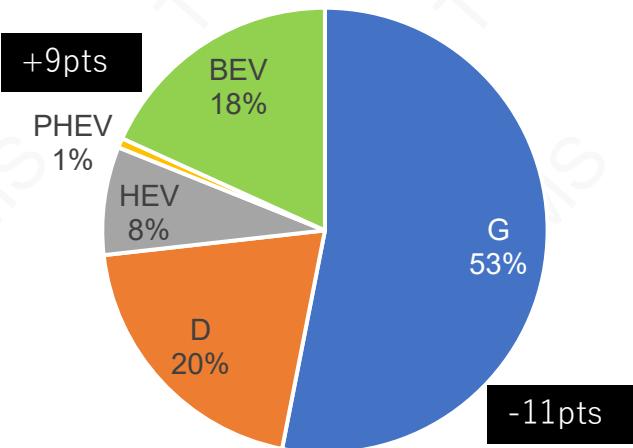
Top 10 Nameplates



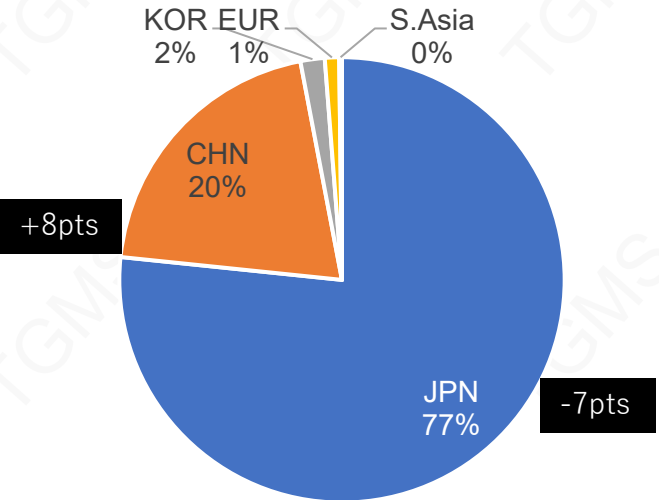
CBU/CKD Mix



Propulsion Mix



Brand Origin Mix

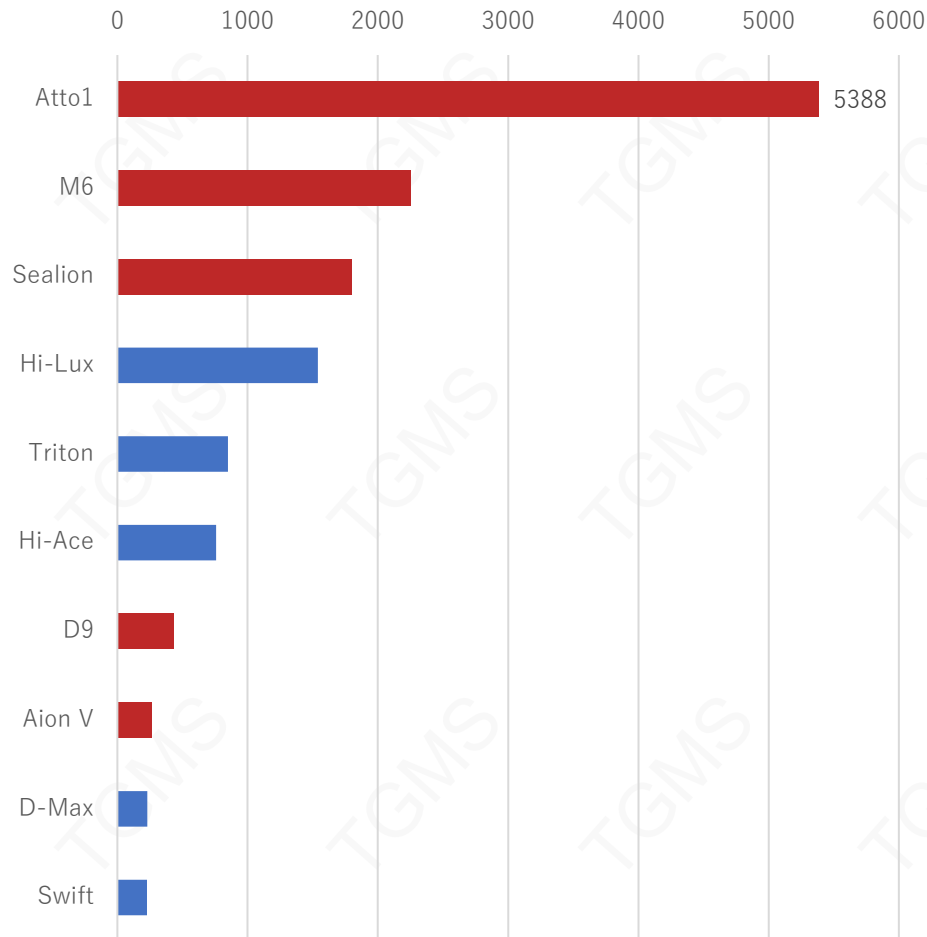


- Total: 74k (MoM +0.3%, YoY -0.8%)
- Atto 1: 8.3k (#1 for 2 consecutive months)
- CBU: 23% (+7pts), xEV: 27% (+9pts)
- China origin: 20% (+8pts)

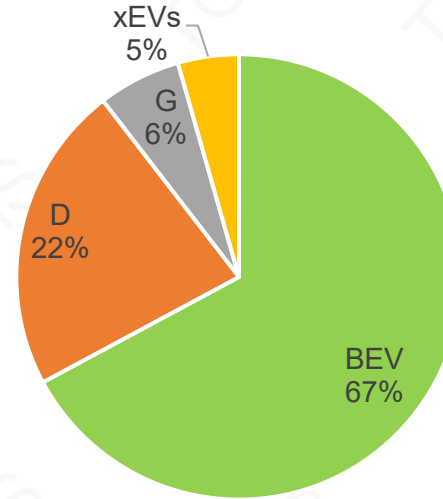
Import (CY25 November Snapshot)

CY25/11	VS. Oct	VS. CY24
15,914	-28.5%	66.0%

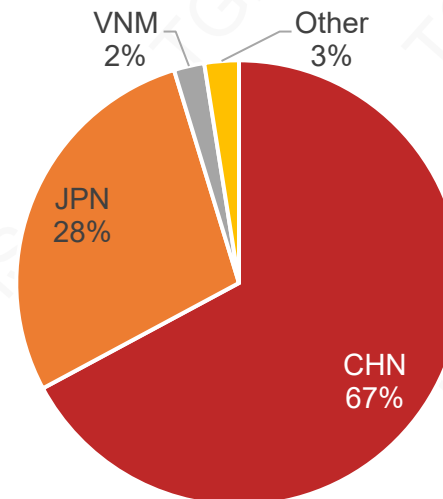
Top 10 Nameplates



Propulsion Mix



Brand Origin Mix

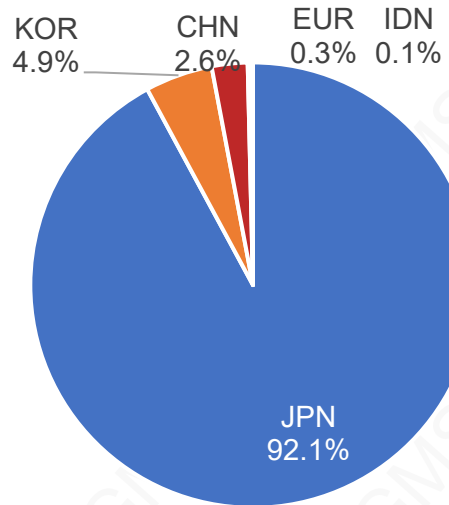


- Total: 16k (MoM -28.5%, YoY +66%)
- Atto 1: 5.4k (#1 for 2 consecutive months)
- BEV: 67%
- China origin: 67%

Production (CY25 November Snapshot)

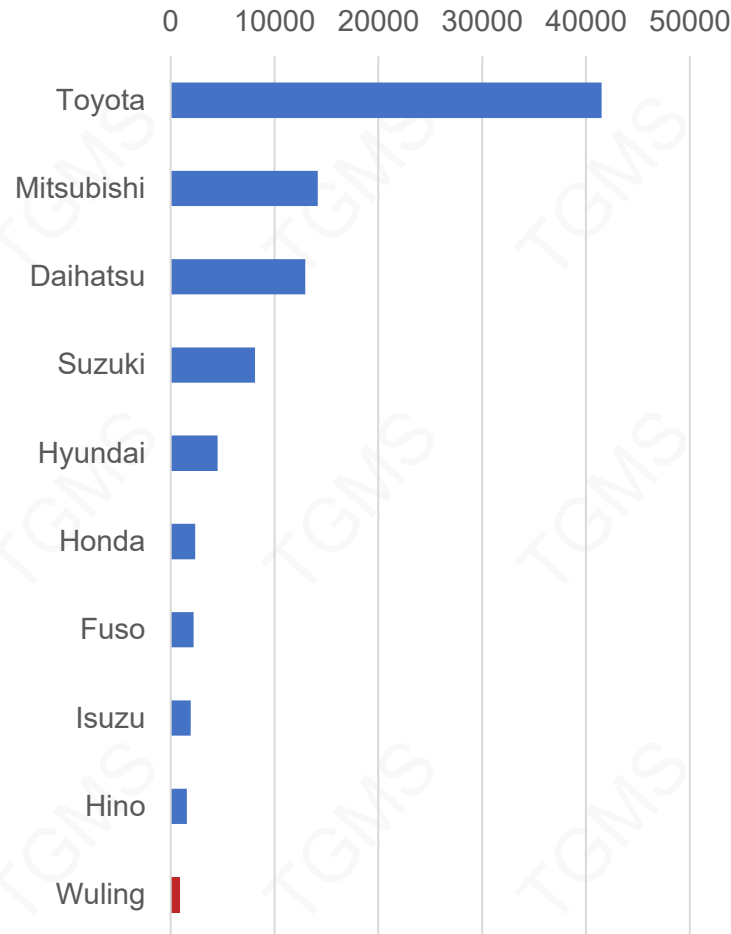
CY25/11	VS. Oct	VS. CY24
92,097	-9.8%	-8.3%

Brand Origin Mix

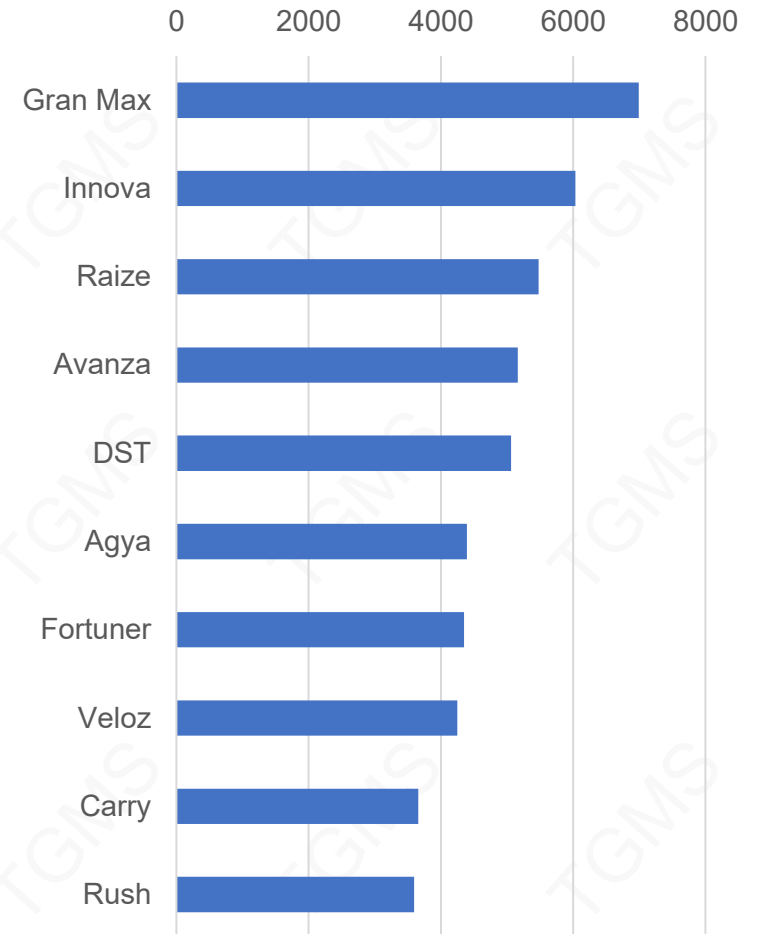


- Total: 92k (MoM -9.8%, YoY -8.3%)
- Japan origin: >90%
- Top10 mainly MPV/SUV

Top 10 Brands



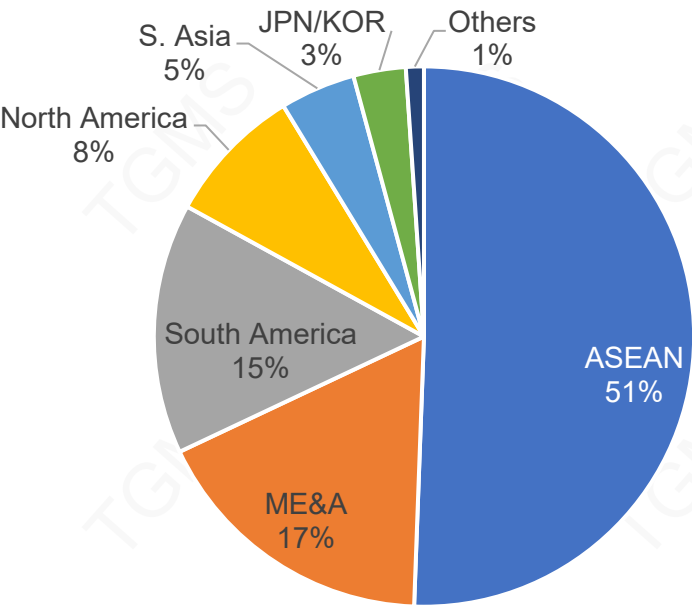
Top 10 Nameplates



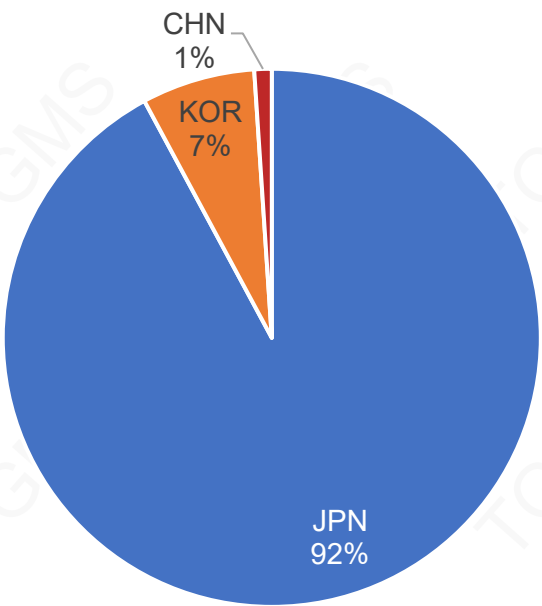
Export (CY25 November Snapshot)

CY25/11	VS. Oct	VS. CY24
46,920	3.4%	26.4%

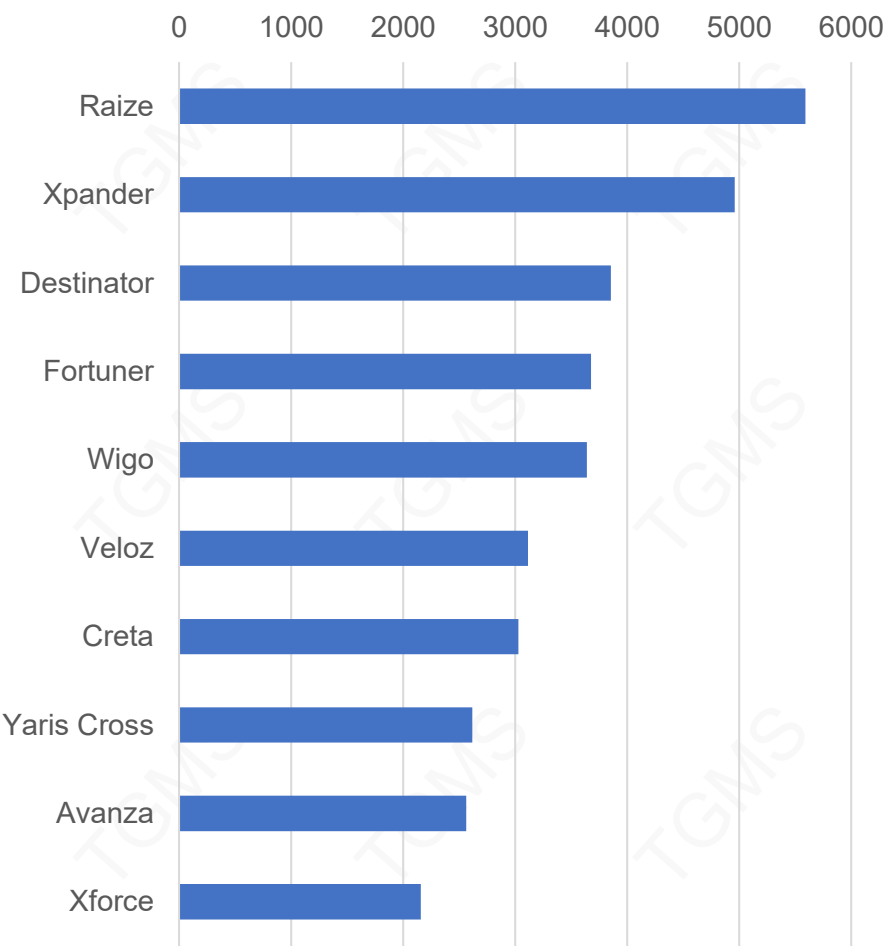
Destination Mix



Brand Origin Mix



Top 10 Nameplates



- Total: 47k (MoM +3.4%, YoY +26.4%)
- Destination: ASEAN 51%
- Japan origin: 92%
- Mainly 7-seaters

Contact & Access

- Lite version summarizes monthly market movements.
- Full version available upon request.
- contact@tgmsstrategy.com