

TGMS Monthly Indonesia Market Analysis

CY25 November Full Version

Tomura
Global Mobility
Strategy

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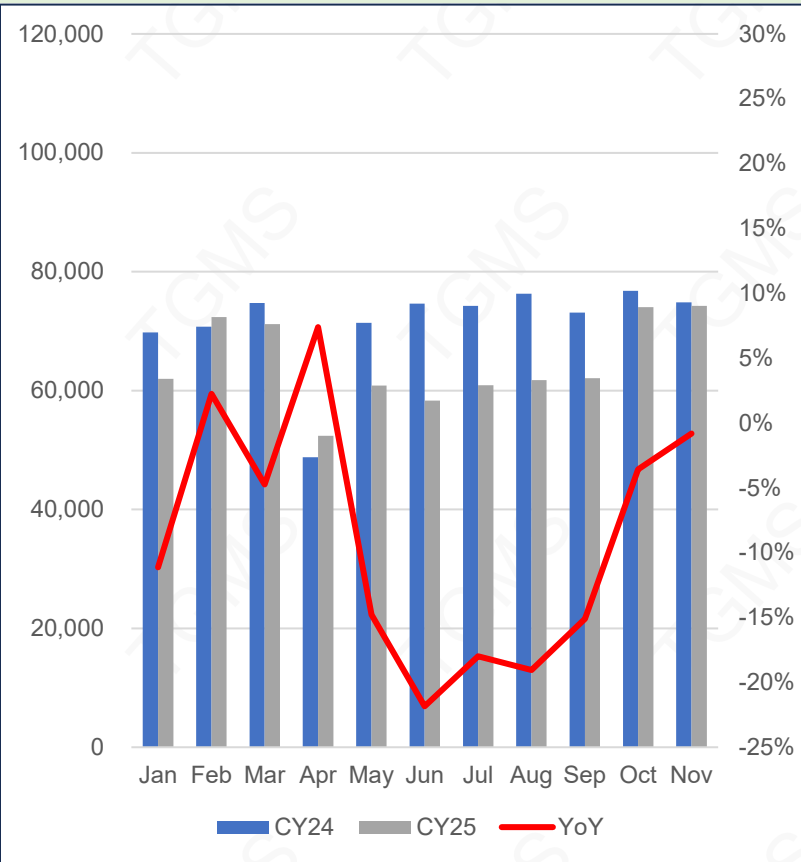
Contents (CY25 November)

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Market Situation Overview – CY25 November

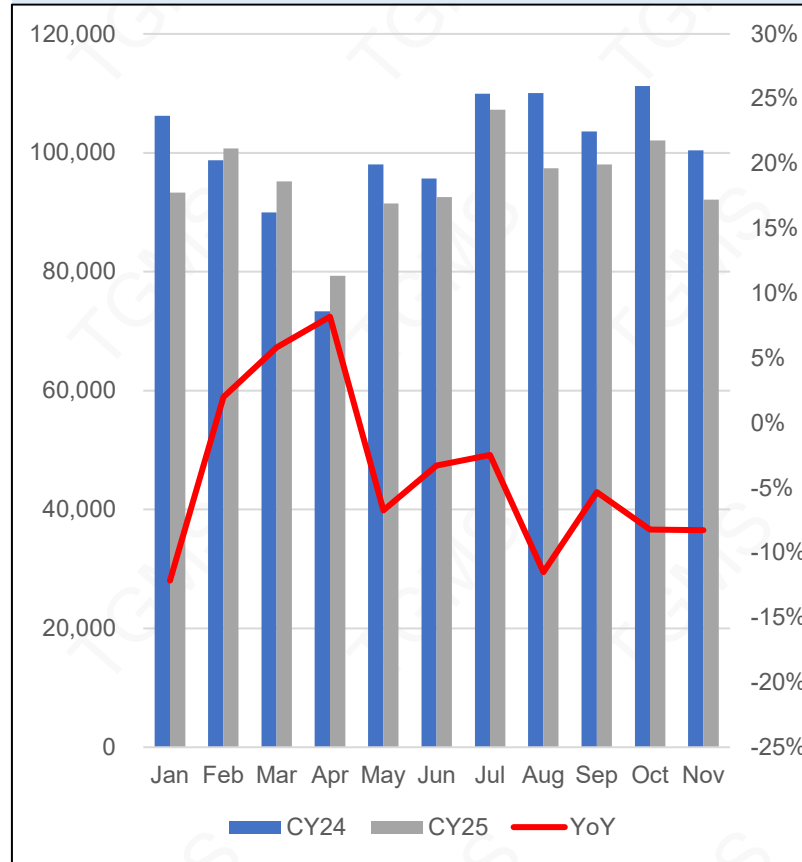
Wholesale

74k/YOY-0.8%, YTD: 710k/-9.6%



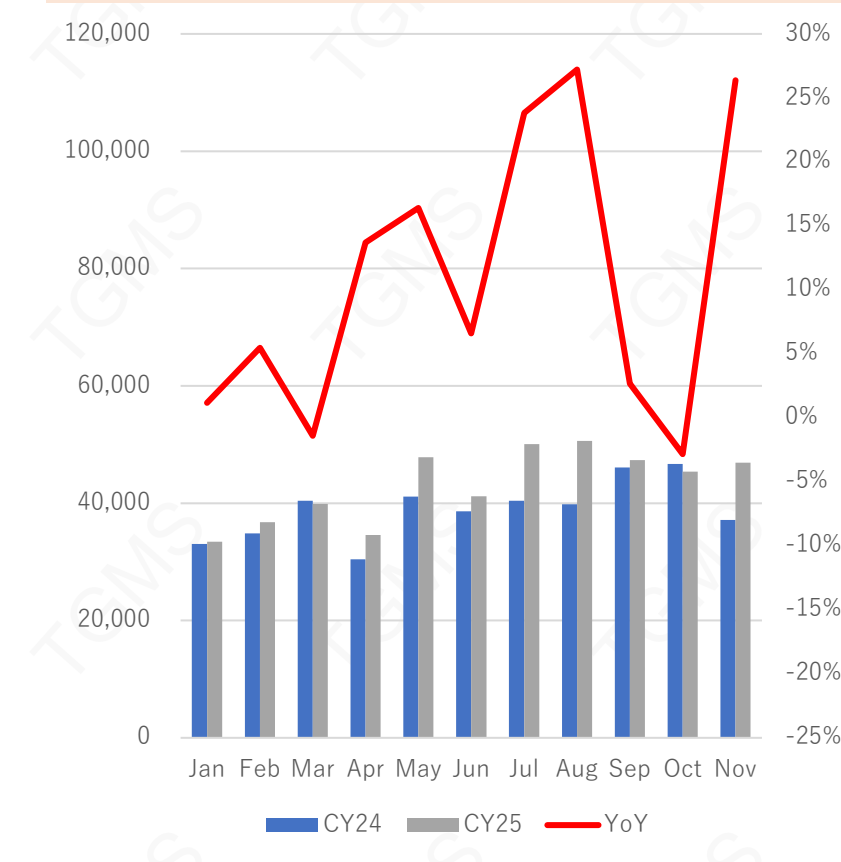
Production

92k/YOY-8.3%, YTD: 1,091k/-4.1%



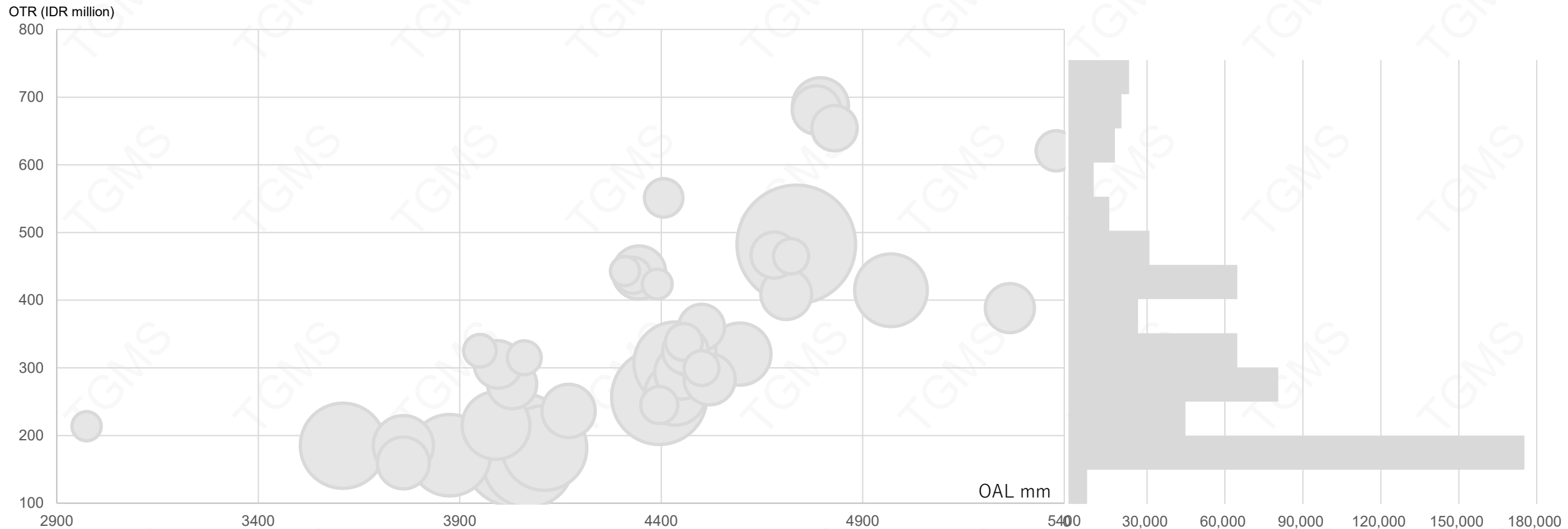
Export

47k/YOY+26.4%, YTD: 474k/+10.6%



- Wholesale volumes are gradually approaching last year's level.
- Production downturn trend is continuing, while exports recorded a sharp YoY increase.

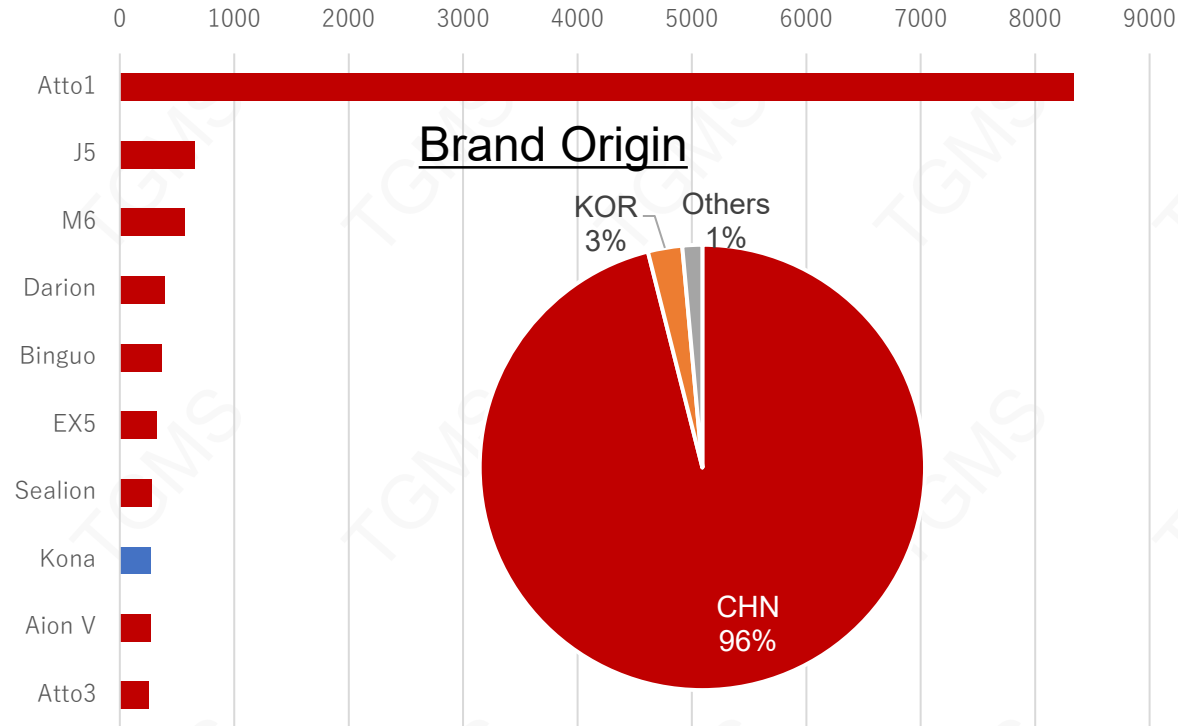
Industry Landscape – CY25 November YTD



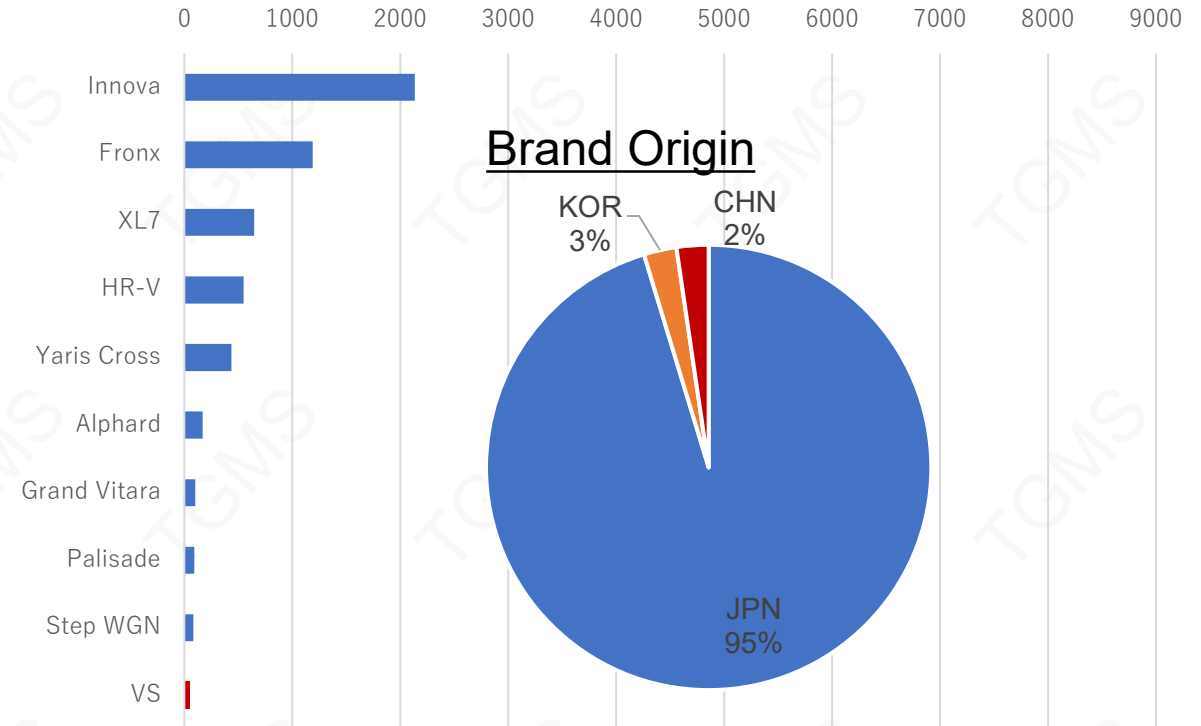
- The volume peak consistently sits in the IDR150–199M band, shaped by AESC and LCBV offerings.
- SUV & MPV portfolios span broader price bands, covering multiple buyer tiers and usage profiles.

BEV vs. HEV Top 10 Nameplates – CY25 November

BEV Top 10 Nameplates (13.2k)



HEV Top 10 Nameplates (5.7k)

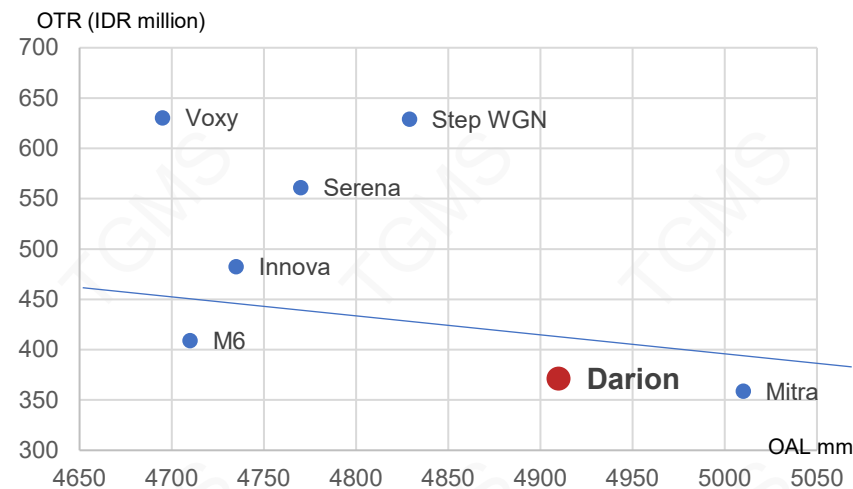


- BEV volume is 96% China, while HEV volume is 95% Japan — a sharply bifurcated xEV landscape.

New Model

Segment / Body Type	D-MPV
Dimensions L x W x H mm	4,910 x 1,870 x 1,770
Wheelbase mm	2,910
Battery Capacity kWh	69.2
Drive Range km (NEDC)	540
Drive System	FWD
Max Power kW	150
Max Torque Nm	310
Seater	7
Price OTR mils	CE: 359 / EX: 419
Competitors	M6, Innova, Mitra

Note: PHEV version also available



- Darion's pricing close to Mitra, suggesting potential internal overlap within Wuling's MPV lineup.
- Within the D-MPV segment, Chinese brands remain positioned below Japanese incumbents.

For Full Deck, please contact naoki@tgmsstrategy.com