

TGMS Monthly Indonesia Market Deep Dive

CY2025 October
Lite Edition

Tomura
Global Mobility
Strategy

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Executive Summary

Wholesale:

CY25/10	VS. Sep	VS. CY24	CY25/10YTD	YOY%
74,019	19%	-4%	635,844	-11%

Top1 Model: Atto 1, 9.4k

Import:

CY25/10	VS. Sep	VS. CY24	CY25/10YTD	YOY%
22,025	67%	104%	131,710	76%

Top1 Model: Atto 1, 12k

Production:

CY25/10	VS. Sep	VS. CY24	CY25/10YTD	YOY%
102,101	4%	-8%	957,293	-4%

Export:

CY25/10	VS. Sep	VS. CY24	CY25/10YTD	YOY%
45,379	-4%	-3%	427,033	9%

Wholesale: 74k (MoM +19%, YoY -4%)

Import: 22k (MoM +67%, YoY +104%)

Production: 102k (MoM +4%, YoY -8%)

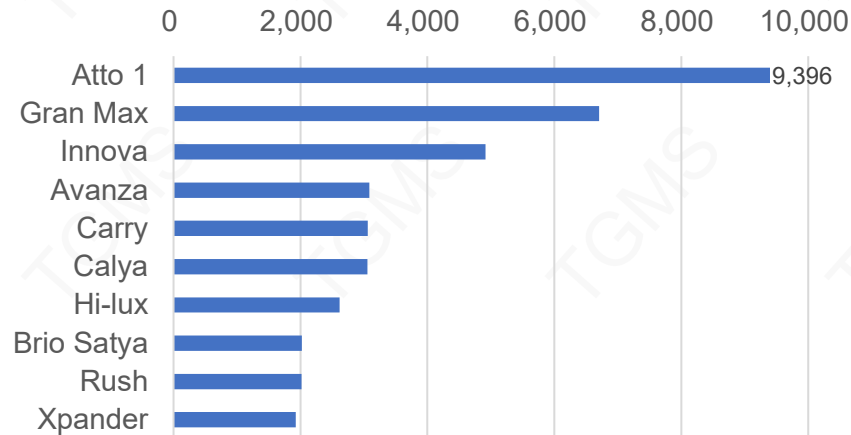
Export: 46k (MoM -4%, YoY -3%)

Highlight: BYD Atto 1 – the single largest contributor to both wholesale and import volumes.

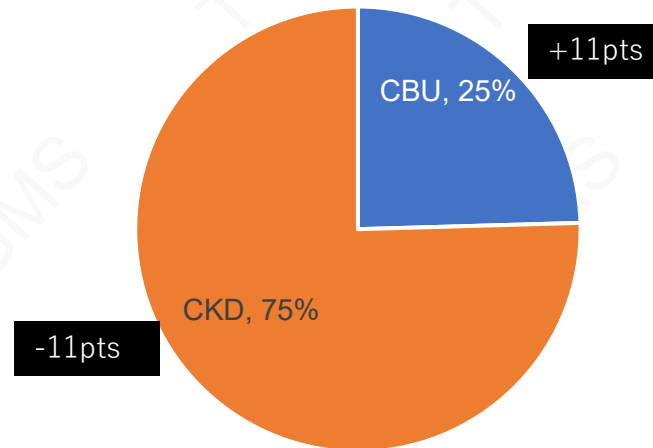
Wholesale (CY25 October Snapshot)

CY25/10	VS. Sep	VS. CY24
74,019	19%	-4%

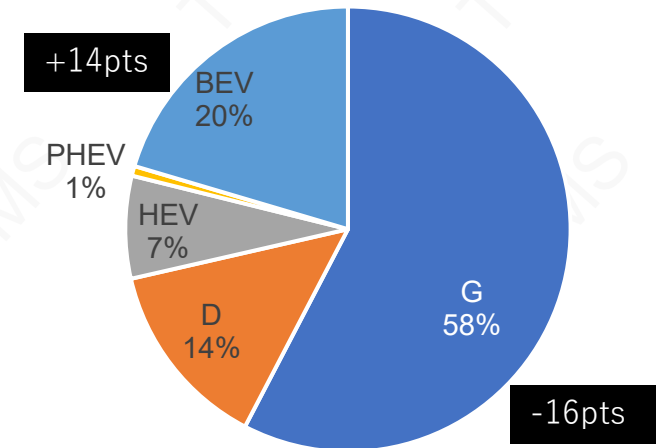
Top 10 Nameplates



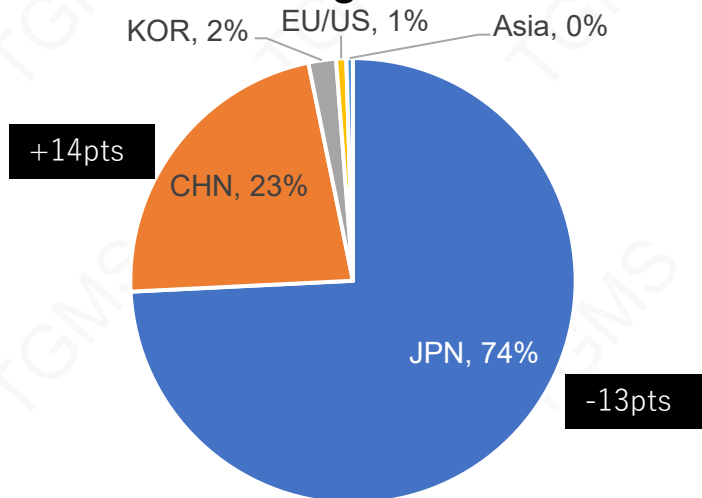
CBU/CKD Mix



Propulsion Mix



Brand Origin Mix

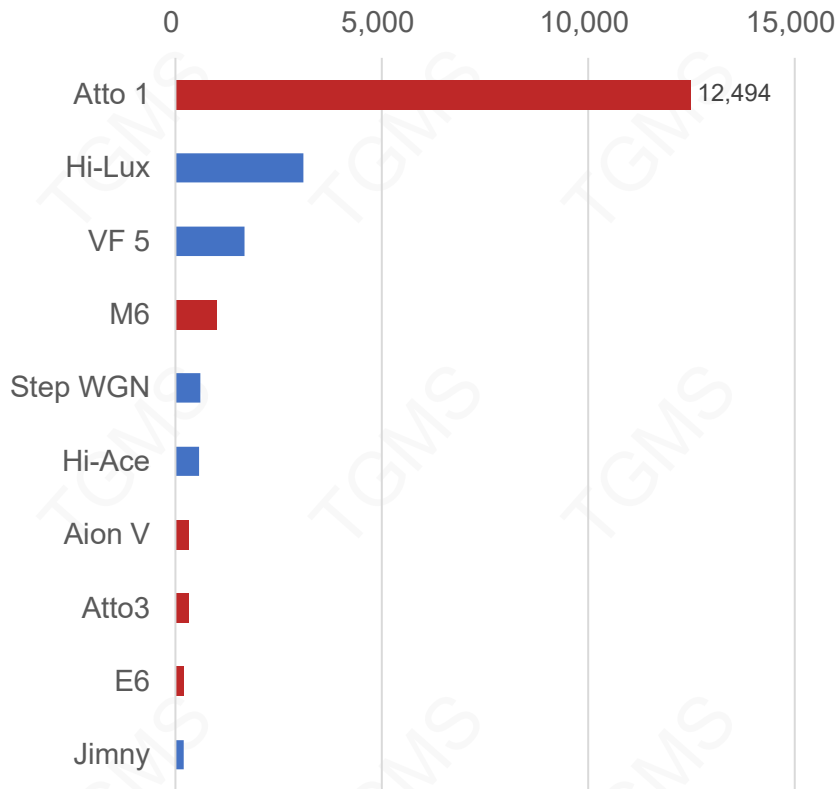


- Total: 74k (MoM +19%, YoY -4%)
- Atto 1: 9.4k (largest single model volume this month)
- CBU: 25% (+11pts), BEV: 20% (+14pts)
- China origin: 23% (+14pts)

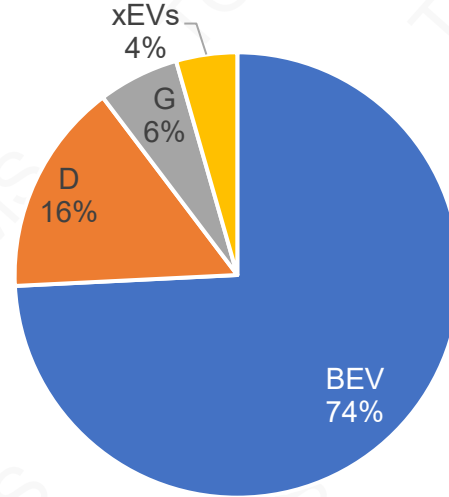
Import (CY25 October Snapshot)

CY25/10	VS. Sep	VS. CY24
22,025	67%	104%

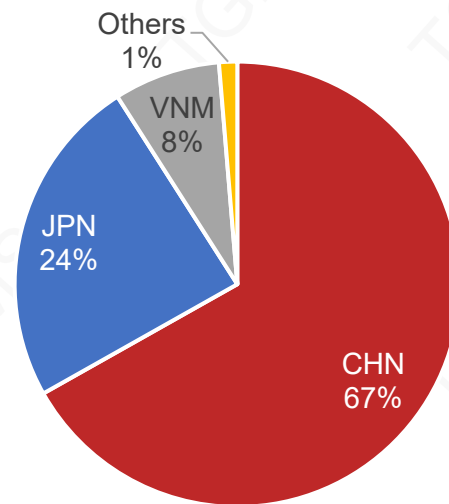
Top 10 Nameplates



Propulsion Mix



Brand Origin Mix

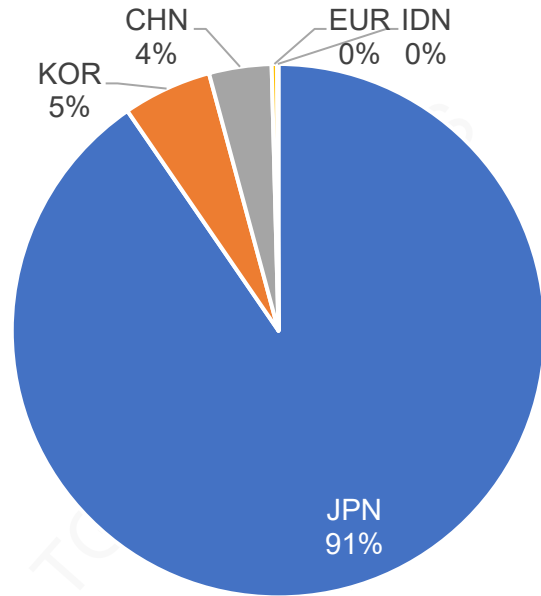


- Total: 22k (MoM +67%, YoY +104%)
- Atto 1: 12k (largest single model volume this month)
- BEV: 74%
- China origin: 67%

Production (CY25 October Snapshot)

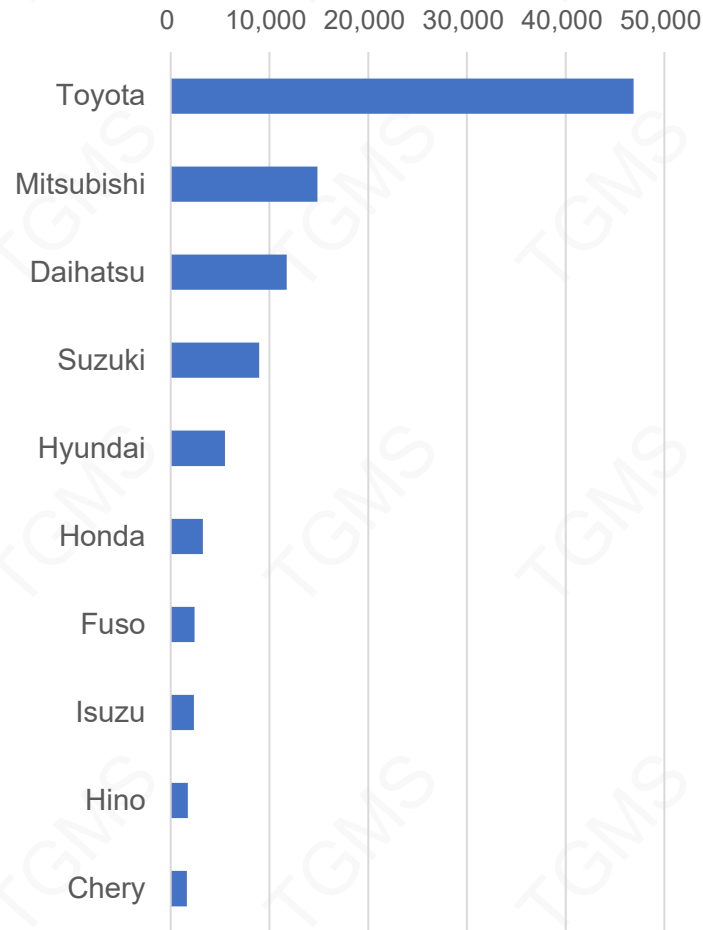
CY25/10	VS. Sep	VS. CY24
102,101	4%	-8%

Brand Origin Mix

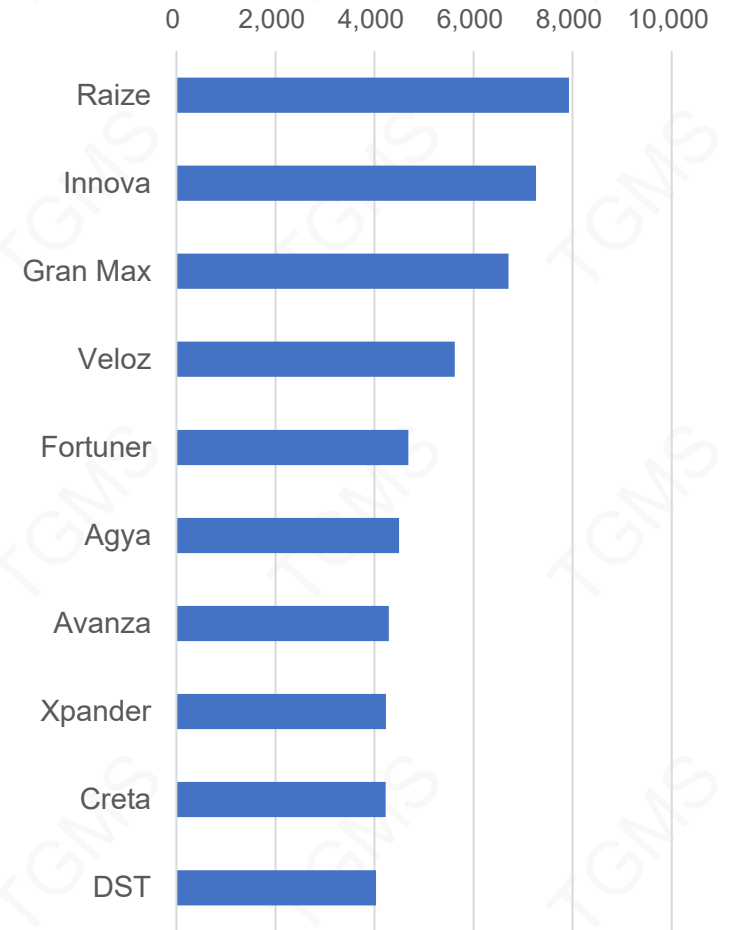


- Total: 102k (MoM +4%, YoY -8%)
- Japan origin: >90%
- Top10 mainly MPV/SUV

Top 10 Brands



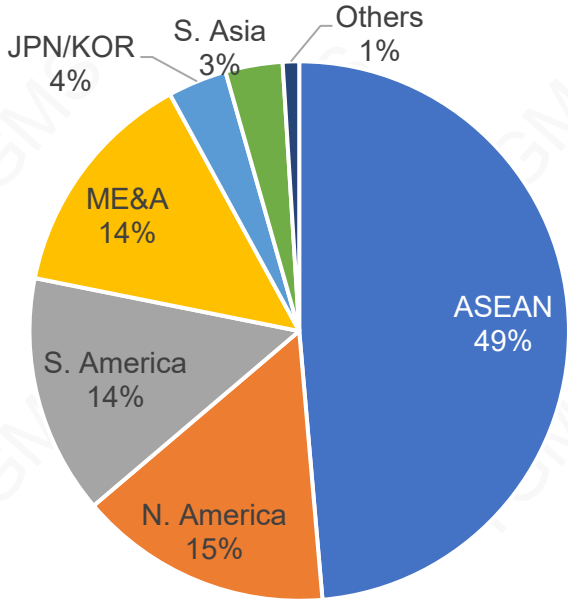
Top 10 Nameplates



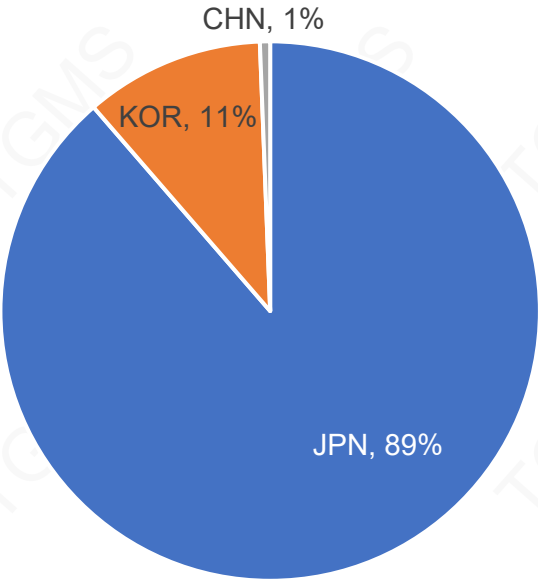
Export (CY25 October Snapshot)

CY25/10	VS. Sep	VS. CY24
45,379	-4%	-3%

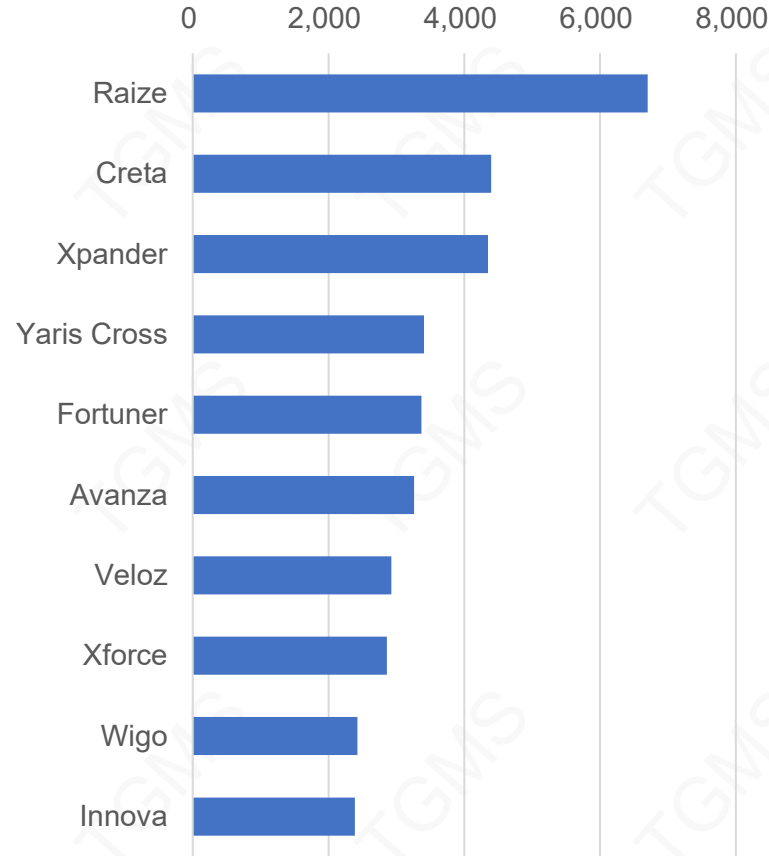
Destination Mix



Brand Origin Mix



Top 10 Nameplates



- Total: 46k (MoM -4%, YoY -3%)
- Destination: ASEAN 49%
- Japan origin: 89%
- Mainly 7-seaters

Contact & Access

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