



Overview of Indonesia Logistics

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**Logistics serve
the needs of people,
facilitate trade, and
foster economic
growth**

Logistics shapes the economy



Economic development causes **more demand** for logistics services and hence leads to logistics development.



The improvement of the transport network **boosts** economic growth through **saving travel time, cost** and **other channels**, while economic growth causes the development of **transport infrastructure**.







Rank	Port	Country	Volume 2024 (Million TEU)	Volume 2023 (Million TEU)	Volume 2022 (Million TEU)	Volume 2021 (Million TEU)
1	Shanghai	China	51,51	49,16	47,30	47,03
2	Singapore	Singapore	41,12	39,01	37,29	37,49
3	Ningbo-Zhoushan	China	39,30	35,30	33,35	31,07
4	Shenzhen	China	33,40	29,88	30,04	28,77
5	Qingdao	China	30,87	28,77	25,67	23,71
6	Guangzhou Harbor	China	26,07	25,41	24,86	24,18
7	Busan	South Korea	24,40	23,04	22,08	22,71
8	Tianjin	China	23,29	20,02	19,83	20,20
9	Jebel Ali, Dubai	United Arab Emirates	15,54	14,47	13,97	13,74
10	Port Klang	Malaysia	14,64	14,06	13,22	13,72

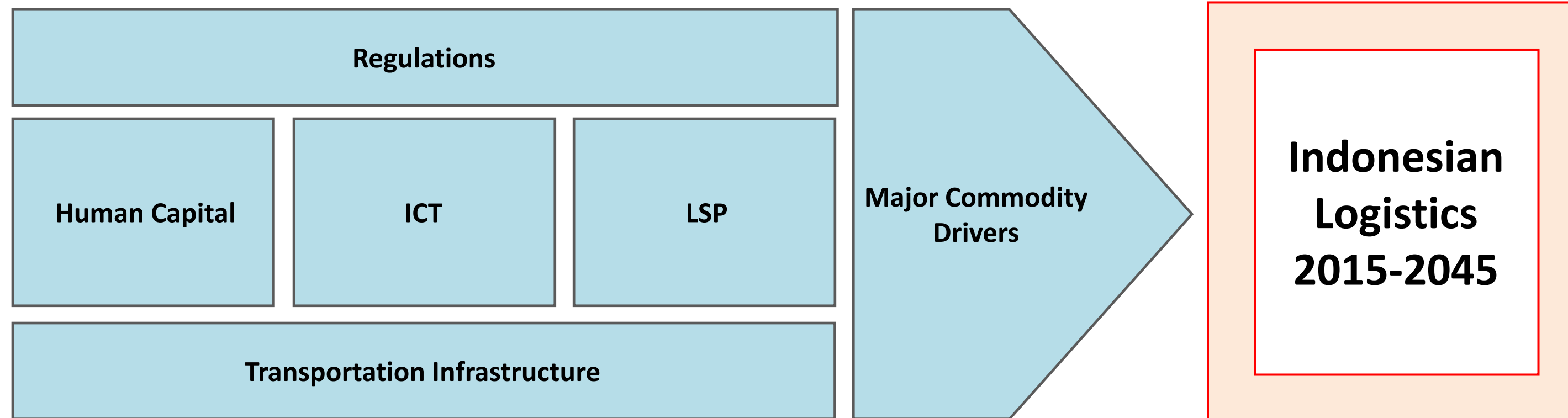


Tanjung Priok ranked 27, 7.8 Million TEUS

Tanjung Perak ranked 47, 4.3 million TEUS

LPI 2023, World Bank

 Negara	 Sea Transport			 Air Transport		 Postal Parcels		Import Delays	Export Delays
	 Jumlah Koneksi Internasional	 Jumlah Jasa	 Turnaround Time at Ports (Mean, days)	 Rata-rata Jumlah Mitra (Masuk & Keluar)	 Aviation Import Dwell Time (Mean, days)	 No of Partners	 Lead Time (days)	 Consolidated Dwell Time (days)	 Consolidated Dwell Time (days)
US	102	223	2.1	158	1.2	149.5	3.9	8.3	7.2
Jerman	70	119	1.7	149.5	1.5	150.5	0.9	12.1	10.2
China	92	590	1.1	127	2.5	121.5	4.1	5.5	5.5
India	58	117	1.1	133	1.9	140	7.9	5.3	5.0
Singapura	81	240	1.2	124.5	0.3	116	1.1	3.0	3.1
Thailand	33	89	1.0	120	2.1	121	2.1	5.7	4.4
Malaysia	70	208	0.7	111	0.8	123	2.9	5.8	5.8
Vietnam	34	180	0.9	98	2.4	103.5	5.0	5.4	5.3
Indonesia	17	118	1.8	104	2.4	117	7.2	3.4	3.5



- **Sistem Logistik Nasional, Perpres 26/2012**
- **National Logistics Ecosystem (NLE), focus on digitalization, Ministry of Finance**
- **Penguatan Logistik Nasional (Rancangan Perpres?) to reduce logistics costs from 14.29% to 12% in 2029 and 8% in 2045**

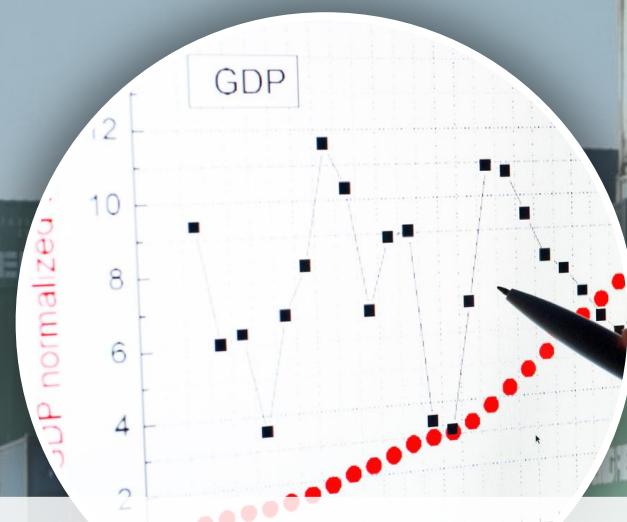
The roles of INSW and NLE

Category	INSW	NLE
 Focus	 Customs clearance and trade facilitation — streamlining import/export documentation and approvals	 Integration of the entire logistics ecosystem, from ports and customs to warehousing, trucking, and private logistics players
 Scope	 Government-to-Government (G2G) integration — linking Customs, Quarantine, BPOM, Trade Ministry, etc.	 Government-to-Business (G2B) integration — connecting public systems with private logistics providers
 Objective	 To simplify and speed up border processes	 To reduce overall logistics costs and improve efficiency of end-to-end supply chain

How Big is Logistics industry

PwC predicts the global logistics outsourcing market to grow with a **CAGR of 4.77%** over the forecast period from **2021-2027**.

More recent estimate: CAGR 6.29% (2025 – 2030)



About 12% of world GDP, or about 9.6 trillions USD



US: close to 2 trillions USD



Indonesia: 131.2 billions USD (2025) according to Mordor Intelligence

PROFILE OF LOGISTICS INDUSTRY IN INDONESIA



Share of international players: about 30%

Double digit growth in online shopping

In SOE, mostly are the results of **spin off** from main businesses.

Local players are not much concentrated, the top 10 player account for less than 30% of market share.

A Logistics Provider/Firm



Perusahaan Logistik Milik BUMN



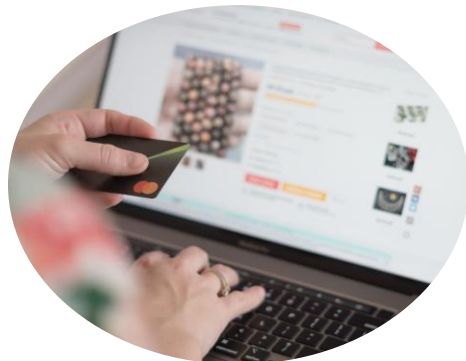
Activities in Logistics



Various Issues



Quality of **infrastructure**



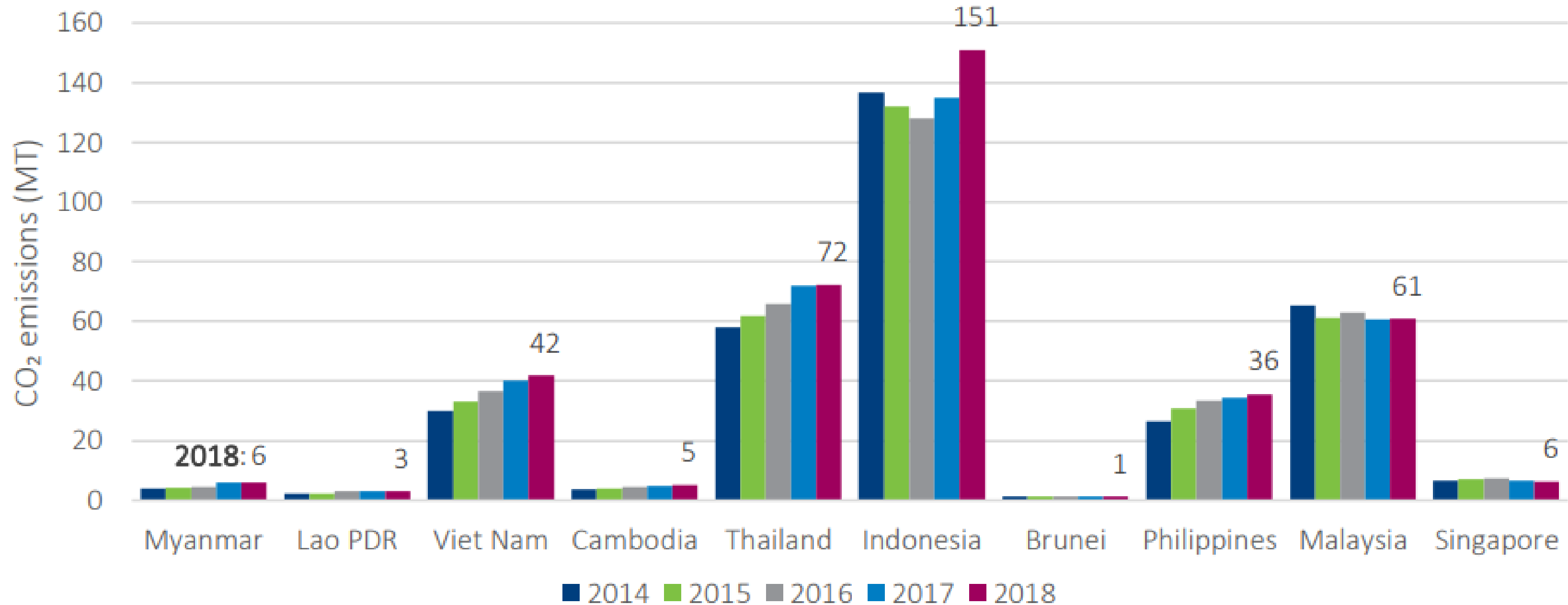
Poorly designed **intermodal** exchanges



East and west directional **imbalances**



Safety and sustainability issues



Tippichai (2025), "Regional freight transport infrastructure and policy in Southeast Asia: An overview", Working Paper, International Transport Forum, Paris.

To develop a sustainable transport sector that accelerates economic growth and supports the well-being of the *rakyat* in line with an advanced nation status

OBJECTIVES

ECONOMIC COMPETITIVENESS

1

Create a conducive transport ecosystem

2

Facilitate seamless movement

SOCIAL ELEMENT

3

Provide mobility that meet people's needs

4

Increase modal share for public transport

ENVIRONMENTAL PROTECTION

5

Deliver an Intelligent, safe and secure system

6

Ensure sustainable use of resources

POLICY THRUSTS

1

Strengthen the governance to create a conducive environment for the transport sector

2

Optimise, build & maintain transport infrastructure, services and networks for efficiency

3

Enhance safety, integration, connectivity & accessibility for seamless journey

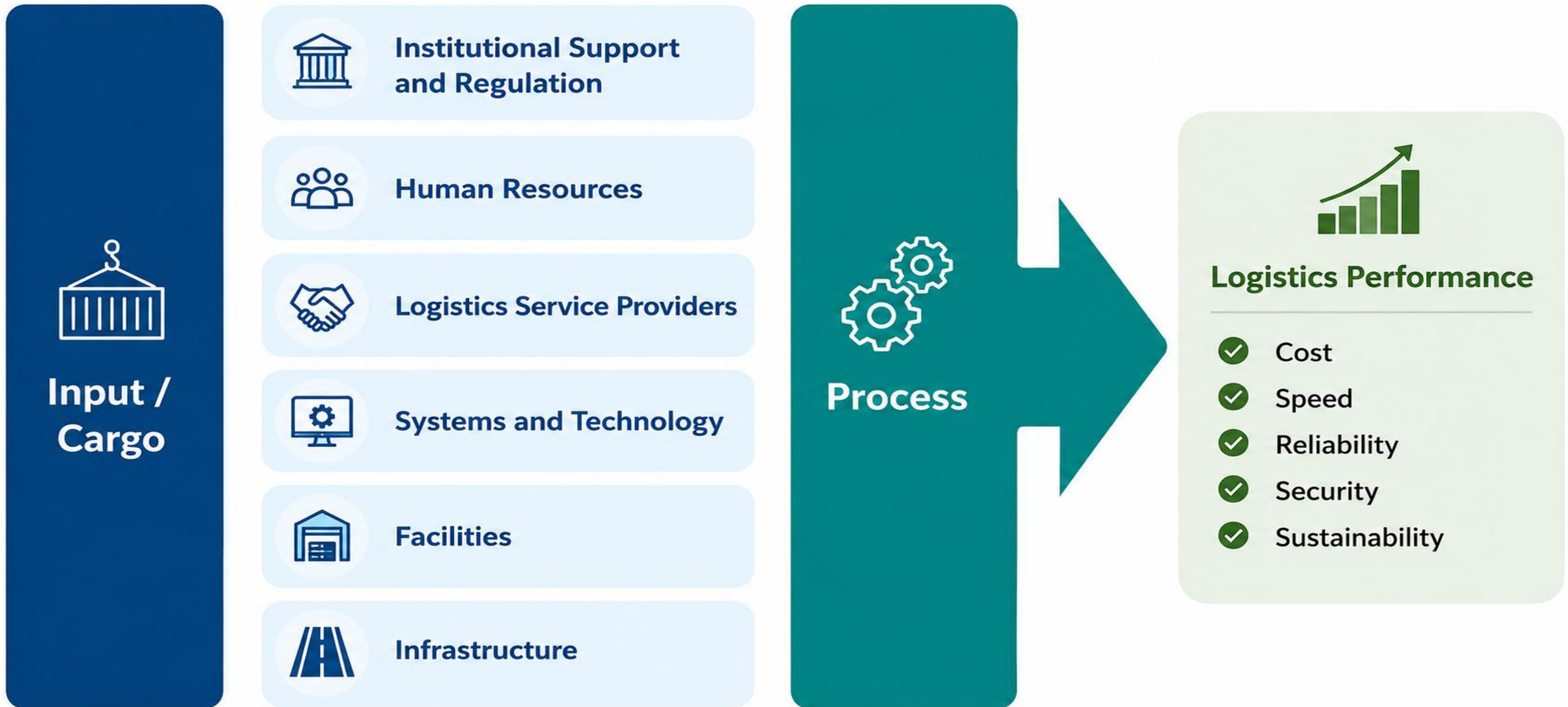
4

Advance towards green transport ecosystem

5

Expand global footprint and promote internationalisation of transport services

Already shifted to sustainability issue (NATIONAL TRANSPORT POLICY 2019-2030)



Thank You

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