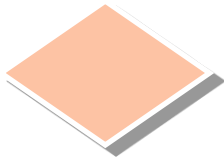




**Kementerian
Perindustrian**
REPUBLIK INDONESIA

AUTOMOTIVE INDUSTRY DEVELOPMENT POLICY



Presented at
Public Dialog “Fuel Economy Standard and Policy Option”
Jakarta, 14 November 2014

Outline



Auto industry position in The National Industrial Development Policy

Energy Roadmap

Future Policy : Roadmap *and Program*

6 Industri Prioritas

Industri berbasis Sumber Daya Alam :

1. Industri hilir berbahan Kelapa Sawit
2. Industri hilir berbahan Kakao
3. Industri hilir berbahan karet
4. Industri Hulu berbahan Logam
5. Industri hilir berbahan Rumput laut

Industri Kecil dan Menengah
(IKM)

Industri barang Modal

Industri Padat Karya:

1. Industri Tekstil dan produk Tekstil
2. Industri Alas Kaki
3. Industri Perabot rumah Tangga

Industri Pertumbuhan Tinggi:

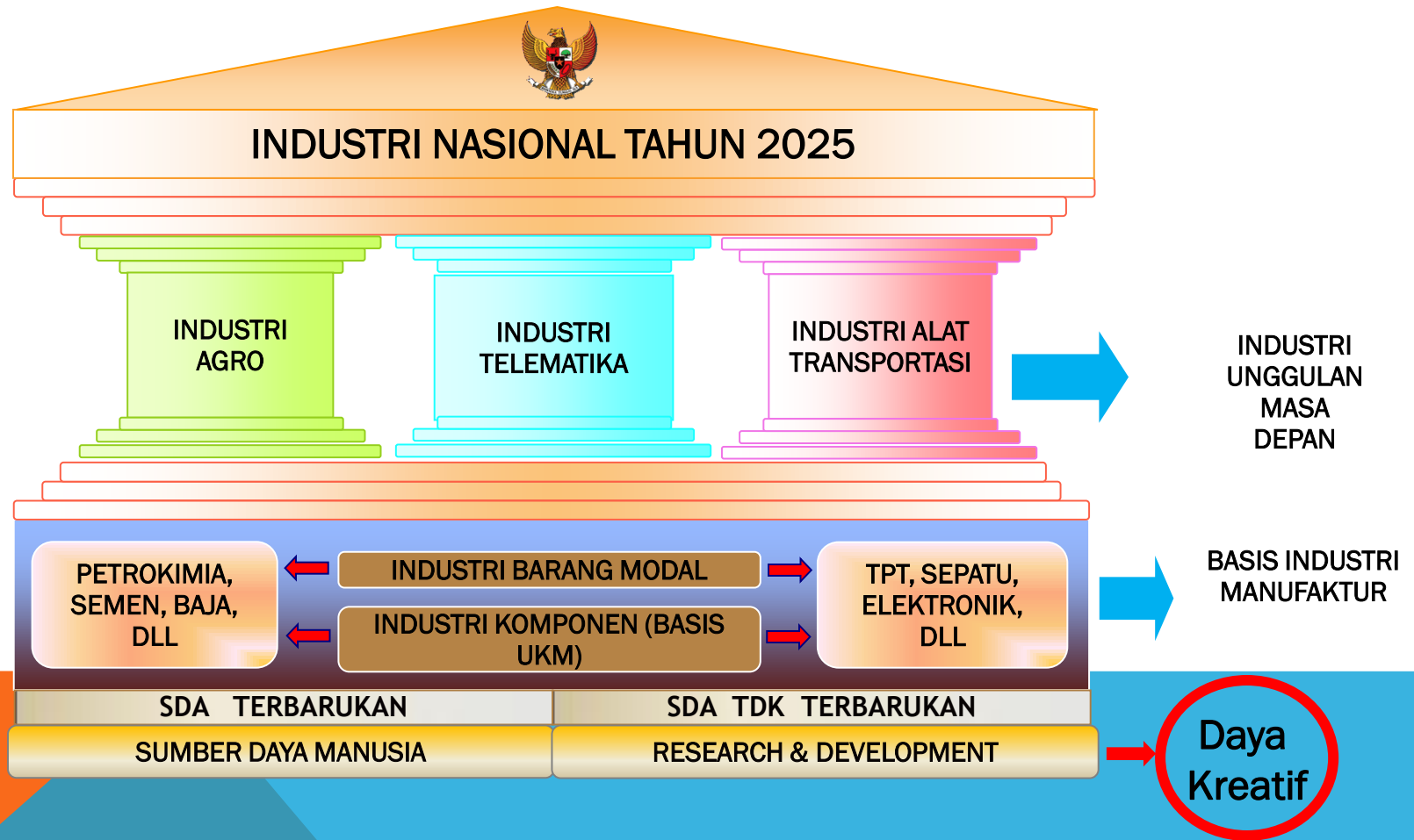
1. Industri Elektronika
2. Industri Telematika (ICT)
3. Industri Otomotif

Industri Prioritas Khusus

1. Industri Hilir Berbahan Gula
2. Industri Pupuk
3. Industri Petrochemical

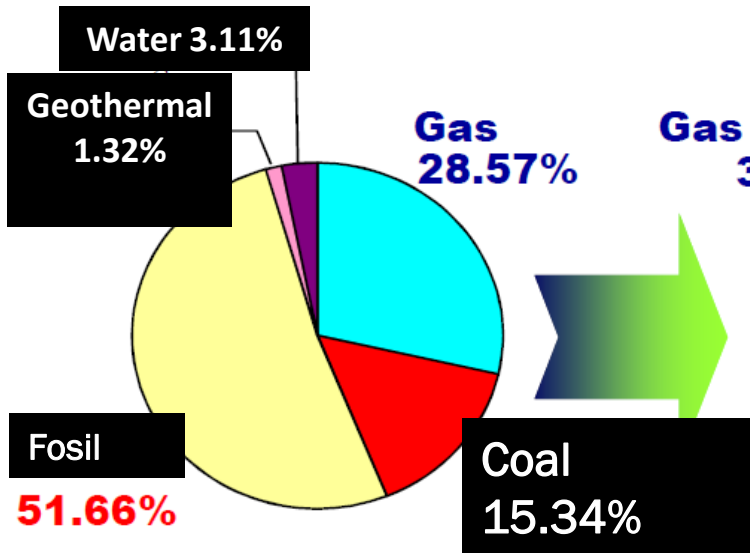


BANGUN INDUSTRI MASA DEPAN (Tahun 2025)

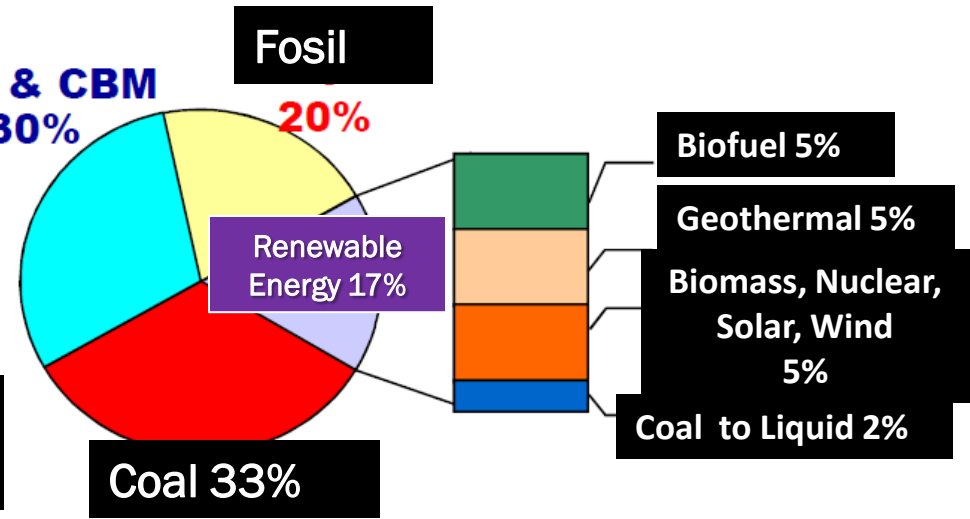


**Indonesia Energy Mix Roadmap Base on Presidential Decree No: 5 year 2006
Focusing on how to increase the using of Non Fossil Energy especially for gas and renewable resources**

Energy (Primary) Mix 2006



Energy (Primary) Mix 2025



Elasticity Energy = 1.8%

Elasticity Energy < 1.0%

Non Fossil Energy = 5%

Non Fossil Energy/Renewable Energy = 17%

Automotive Industry Roadmap

2010



- Production Base : MPV, Light Commercial Truck and environmental friendly vehicle.
- 50% motor cycle design.

- Manufacture of engine, MPV transmission and Light Commercial Truck.
- Component supplier for MPV and Light Commercial Truck.

2015



- MPV, Commercial Truck up to 24 tons, SUV and small sedan energy saving and environmental friendly.
- 80% design of MPV and Light commercial truck.

- Manufacture of engine, transmission of Commercial Truck up to 24 tons, SUV and small economical small sedan .
- Component supplier of Commercial Truck up to 24 tons, SUV and small sedan.

2020



- 80% design of small sedan and SUV.
- Hybrid engine, integrated ECU system.
- Component commercial truck > 24 tons, Medium sedan, Hybrid car.
- MPV, SUV, Small sedan energy saving environmental friendly, Commercial truck > 24 tons, Medium sedan, Hybrid car.

2025



- MPV, SUV, Small economical sedan, Commercial truck > 24 tons, Medium sedan, Hybrid car and Luxury car.
- 80% design of medium sedan.
- Manufacture of luxury car.
- Supplier of luxury car component.

Fuel Economy Vehicle Development Roadmap



PC Based with Fuel Economy and eco friendly Hybrid/Electric/FC

2015-2025



2013

Start shifting to PC Based LCGC*

Vehicle Market	$1,500\text{ K} + \text{LCGC (100 K)} = 1,600\text{ K}$ Conventional (CV/PC) : 62% Green (CV/ PC) : 20% LCGC : 13% Hybrid : 5%*
GDP/ Capita	US\$ 5,300*



2012

CV Based Platform

Vehicle Market	$1,200\text{ K} + \text{LCGC (50 K)} = 1,250\text{ K}$ Conventional (CV/PC) : 70% Green (CV/PC) : 20% LCGC : 10%
GDP/ Capita	US\$ 4,400

- Start shifting to advance technology
- Highest fuel efficiency & lowest emission (Almost zero)

Vehicle Market	1,116 K units; CV : 77% → LC* > 60% PC : 23% → LC < 60%
GDP/ Capita	US\$ 3,900

- Start shifting to alternative fuel (Gas, Biofuel, etc.)
- Higher fuel efficiency & lower emission

- Use conventional technology (using petrol or diesel fuel)
- Low fuel efficiency

Current Fuel Economy Car Program

Minister of Industry Decree No. 33/2013

Item	LCGC Program (LCGC: Low Cost Green Car)	LCE Plan (Low Carbon Emission)
Purpose	<ul style="list-style-type: none"> • Reducing fuel subsidy • Developing local industry 	<ul style="list-style-type: none"> • Reducing fuel subsidy • Mitigating global warming
Target vehicle type	Gasoline Vehicle (GV): 1.2 L and less, Diesel Vehicle (DV): 1.2-1.5 L	Passenger cars : Advance Diesel/Petrol Engine, Dual Fuel (Gasoline-Gas), CNG or LGV-Dedicated Engine, Hybrid Vehicle, Electric Vehicle, Biofuel)
Fuel economy	20 km/L and more	
Current Incentive: Luxury Tax break (PPnBM)	0% (currently 10%)	<ul style="list-style-type: none"> • FE 20-28 km/L: 25% reduction (currently 20-75%) • FE 28 km/L and more: 50% reduction (currently 20-75%) • Electric vehicles: 0%
Government Regulation (PP) No. 41/2013		

LCGC Participants (by Brands)



PT. Astra Daihatsu Motor

- Produk : Daihatsu Ayla dan Toyota Agya
- Type : Manual dan Otomatis
- Production capacity 330 -430 K dan 110 -240 K for Toyota Brand



PT. Honda Prospect Motor

- Produk : Brio Satya
- Type : Manual
- Production Capacity 60-180K



PT. Suzuki Indomobil Motor

- Produk : Karimun Wagon R
- Type : Manual
- Production capacity 110 – 180 K



PT. Nissan Motor Indonesia

- Produk : Datsun Go Panca dan Datsun Go+ Panca
- Type : Manual

Thank You

