



INDONESIAN LOGISTICS AND FORWARDERS ASSOCIATION (ILFA)

COUNTRY REPORT
FOR THE
FAPAA 52nd ECM and AGM
AT
KATHMANDU MARRIOTT HOTEL
Manakamana Marg, Nexal, Kathmandu Nepal
FROM JUNE 28 - 30 2026

Indonesian Logistics and Forwarders Association – ILFA

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ILFA PROFILE

ILFA on July 25, 2026 is 37 years old. This nonprofit organization was previously called INFA (Indonesian Forwarders Association) which is a merger of three associations, namely Veem and Expedition Association of Indonesia (GAVEKSI), INFFA (Indonesian Freight Forwarders Association) and Air Cargo Expedition Association (AEMPU), endorsed by the Minister of Transportation with Decree No. KP.4 / AU.001 / Phb-89 on July 25, 1989, following the issuance of Decree of the Minister of Transportation No. KM.10 / 1988 on Freight Forwarding.

The development of freight forwarding in the direction of multimodal, logistics and supply chain management system encouraged INFA to hold an extraordinary deliberation on July 10, 2010 in Bali resulting in a change of name agreement to ILFA, which was subsequently approved by the Minister of Transportation with Decree No. KP.781 / 2012 on ILFA as the only business organization that builds freight forwarding companies, multimodal transport operators, logistics service providers.



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ILFA PROFILE

Companies that joined to become members of ILFA to date 3,521 companies spread across 34 provinces in Indonesia. Of such members, most (43%) are headquartered in Jakarta.

In the country, ILFA is an outstanding member of Indonesia Chamber of Commerce and Industry (KADIN) and KADIN Indonesia Accreditation and Registration Board (BSAN). In the international area, ILFA is a member of AFFA, FAPAA and FIATA.



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Cargo movement at major airports in Indonesia 2025

1. In 2025, Soekarno-Hatta International Airport (CGK) handled approximately 550,000 to 578,000 tons of air freight, solidifying its status as Indonesia's primary air cargo gateway. Domestic cargo accounted for roughly 70% of the total throughput, driven by inter-island logistics, while international freight comprised the remaining 30%
2. I Gusti Ngurah Rai International Airport in Bali processed a total of **108,000 tons** of cargo in 2025. Logistics operations were heavily dominated by international freight, accounting for roughly **78,500 tons** (72%), while domestic cargo movements accounted for approximately **30,000 tons** (28%). A breakdown of the cargo activity highlights the following details:
 - ❑ **Total Cargo Handled:** 108,000 tons
 - ❑ **International Cargo:** 78,500 tons
 - ❑ **Domestic Cargo:** ~30,000 tons



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Cargo movement at major airports in Indonesia 2025

3. Sultan Hasanuddin International Airport (UPG) managed a total cargo volume of 41,000 tons. Cargo operations were heavily dominated by **domestic routes** to feed Eastern Indonesia, alongside steady, though much smaller, **international** logistics connections.

Breakdown of Cargo Activities

Total Volume: 41,000 metric tons (combined loading, unloading, and transit).

Domestic Operations: Accounted for over 90% of all cargo movements. These consisted largely of agricultural, retail, and manufactured goods being distributed from Makassar to hubs throughout Sulawesi, Maluku, and Papua.

International Operations: Primarily involved specialized goods, imports, and high-value exports flown directly to regional international hubs, though cargo capacity was heavily skewed toward passenger baggage and mail on international flights.



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Cargo movement at major airports in Indonesia 2025

4. Juanda International Airport manages significant air cargo operations, handling around 64,000 to 66,400 metric tons annually. The volume is overwhelmingly dominated by domestic shipments, which account for roughly 75% to 80% of the total tonnage, while international exports and imports represent the remaining share.

Breakdown of Cargo Movement

Total Annual Volume: Juanda Airport handles a cargo throughput of approximately 64,080 tons.

- Domestic vs. International Split: Domestic cargo leads movement, driven heavily by e-commerce, general freight, and perishable goods destined for major hubs in cities like Jakarta, Makassar, Bali, and Balikpapan.
- International cargo constitutes a smaller, yet steadily growing volume (around 12,000 to 15,000 tons yearly)



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MARITIME AND PORT

A New Direct Service from Makassar to China

Wan Hai Lines, a leading Taiwanese shipping company, officially launched its direct Makassar (eastern Indonesia) – China, service with the maiden call of containership at Makassar New Port on February 11, 2025.

The service operates on Makassar Kao Shiung (Taiwan) and Shekou (China) on regular basis, it is expected to significantly boost export from Sulawesi island to international market, also establishing Makassar Port as regional hub for eastern Indonesia.

This new route marks a crucial step in improving Indonesia's maritime connectivity.



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MARITIME AND PORT

Subholding Pelindo Terminal Petikemas (SPTP) Performance,

SPTP, A leading container terminal operator in Indonesia, has achieved a double digit container export growth, amid global challenge, volatility and limited growth of Indonesia's export value.

SPTP demonstrated strong operational and financial growth in 2025. The company recorded a container throughput of **13,34 juta TEUs**, successfully surpassing its initial target. This marks a **6,87% growth** compared to the overall container traffic in 2024.

Key performance highlights include:

Financial Contribution: SPTP contributed **Rp 1,73 triliun** to the state treasury throughout the year through taxes, non-tax state revenues (PNBP), and dividend payouts.

Operational Volume: The 13,34 juta TEUs handled reflects robust trade activity and increased terminal efficiency across SPTP's operational areas.

Target Achievement: The 2025 performance comfortably exceeded the company's initial projection of 12,95 juta TEUs set in late 2025.



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MARITIME AND PORT

Expansion of berth at JIPE (Java Integrated Industry and Port Estate) Terminal.

A new model of port development in Indonesia, which integrates port to Special Industry Zone (SIZ) at Gresik, east Java. The completion of berth expansion in November 2024.

The development and operations of the terminal integrated with Industrial complexes, aims boost productivity, efficiency and reaching a greater economic of scale and buld a strong manufacturing ecosystem in the region.



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MARITIME AND PORT

V. Strengthening logistics and supply chain in Greater Jakarta Metropolitan Area

Fulfilling the growing demand of port services in the area through the development of Patimban Port, Subang, West Java.

Patimban Port development project phase III, aims to enhance logistic and supply chain ecosystem, serving many industrial complexes around West Java Region. As the continuation of previous development project, phase III project will construct and build a new port which consists of Container Terminal, Car Terminal and Terminal Support Facilities.

Strategically located in eastern part of Jakarta Metropolitan Area, whereby the development of Patimban Port is expected to augment further economic growth and investment environment in Indonesia.



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MARITIME AND PORT

V. Strengthening logistics and supply chain in Greater Jakarta Metropolitan Area

The terminal will be operated by PT Patimbangan Global Gateway Terminal (PGT), where PGT is a joint venture company of PT Samudera Indonesia,tbk (an Indonesia leading public listed shipping company), Africa Global Logistic (AGT, the biggest multi modal logistic operator owned by MSC Group), and Toyota Tsuho Corp (TTC, a global trading company whithing Toyota Group).



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Indonesia's logistics in 2025

The biggest logistics service opportunity in Indonesia is the shift toward **B2B contract logistics, cold chain storage, and third-party logistics (3PL)**. Moving away from fragmented e-commerce parcels, the sector is targeting bulk freight, pharmaceuticals, and manufacturing distribution to tap into a booming \$130+ billion market.

The logistics industry remains a primary pillar of national growth. Several key trends define the most lucrative opportunities:

B2B Logistics & 3PL Solutions: Corporate clients are increasingly outsourcing supply chains to 3PLs to secure predictable costs, on-time delivery, and better efficiency across Indonesia's vast geography.

Cold Chain Infrastructure: Demand for temperature-controlled warehousing and refrigerated transport is surging. This is driven by rising domestic consumption of perishable goods, pharmaceuticals, and fresh seafood. [1,

Modern Warehousing: Major firms (such as BCG) identify high-tech, modern warehouse facilities as a hot investment area, particularly as e-tailers and retailers consolidate their supply bases



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Indonesia

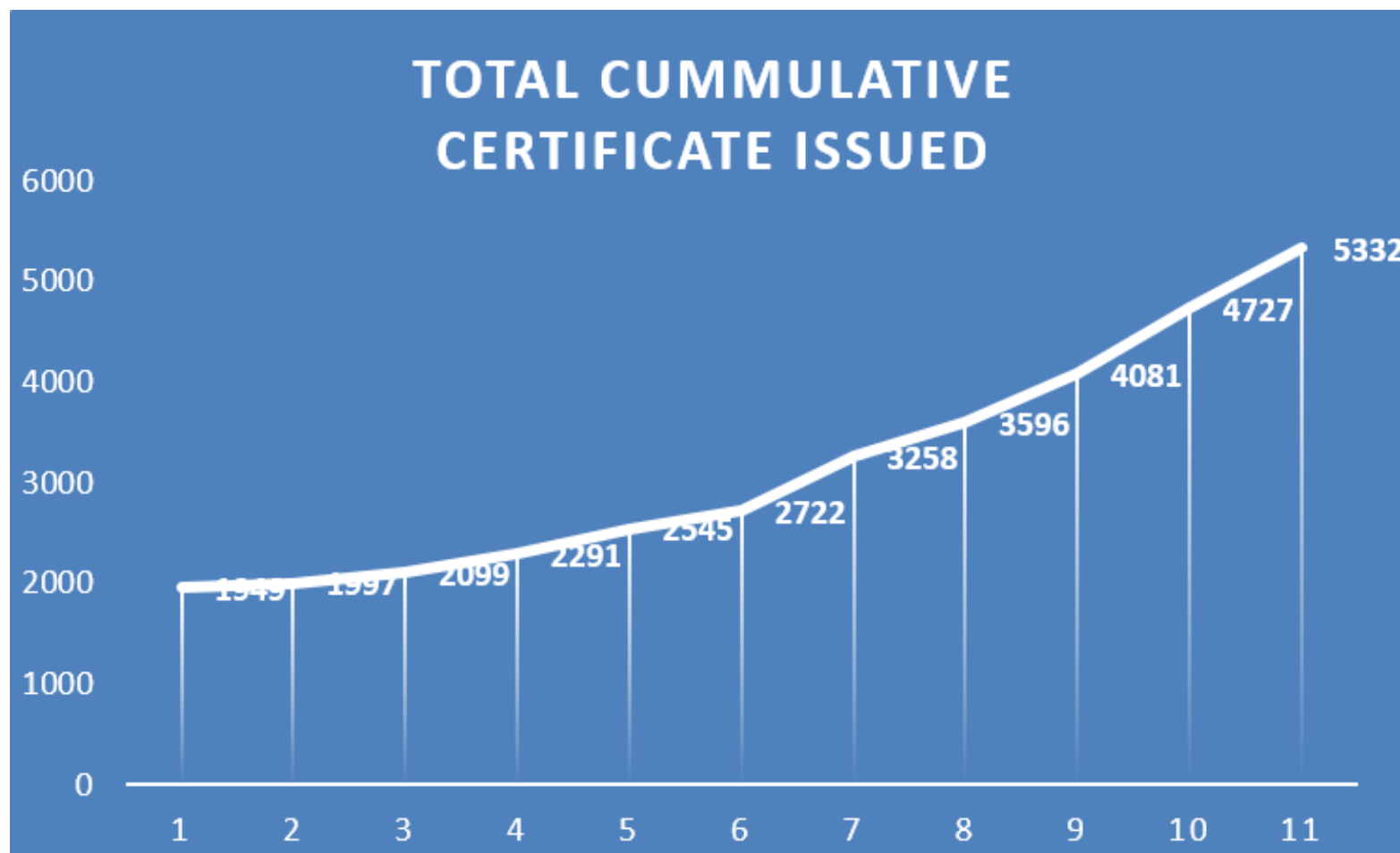
2025 Activities e-learning

NO	COURSE	BATCH	PAX
1	BASIC LOGISTICS & FREIGHT FORWARDING COURSE 15 MODULES : <ul style="list-style-type: none">▪ Scope of Freight Forwarding & introduction to Logistics▪ Incoterms 2020▪ Documentary Credit & UCP 600▪ Packaging & Dangerous Goods▪ Cargo Insurance▪ Carriage of Good by Sea▪ Carriage of Goods by Air▪ Carriage of Good by Road & Rail▪ Customs Procedures▪ Port Procedures▪ Containerization▪ Consolidation▪ Freight Forwarding Documents▪ Liability Insurance▪ Multimodal Transport	7	113
2	FIATA DIPLOMA IN FREIGHT FORWARDING (FIATA STANDARD)	1	15
3	INTRODUCTION TO FREIGHT FORWARDING & LOGISTICS, STANDARD TRADING CONDITION (ILFA STC)	1	30
4	AFFA TOT INTRODUCTION TO THE HALAL LOGISTICS AWARENESS	1	9
5	COLD CHAIN LOGISTICS TRAINING	1	73
	TOTAL	11	240

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LSP Logistik Insan Prima 2025



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Total cumulative certificate issued by LSP LIP

• Supply Chain Manager	: 496
• Freight Forwarder	: 1.761
• Warehouse Supervisor	: 1.070
• Logistics Administrative Officer	: 693
• Warehouse Operator	: 676
• Driver General Cargo	: 10
• Driver of Heavy Equipment	: -
• Driver of Container	: 563
• Driver of Special Goods	: -
• Driver of Dangerous Goods	: 63
» Total	: 5.332

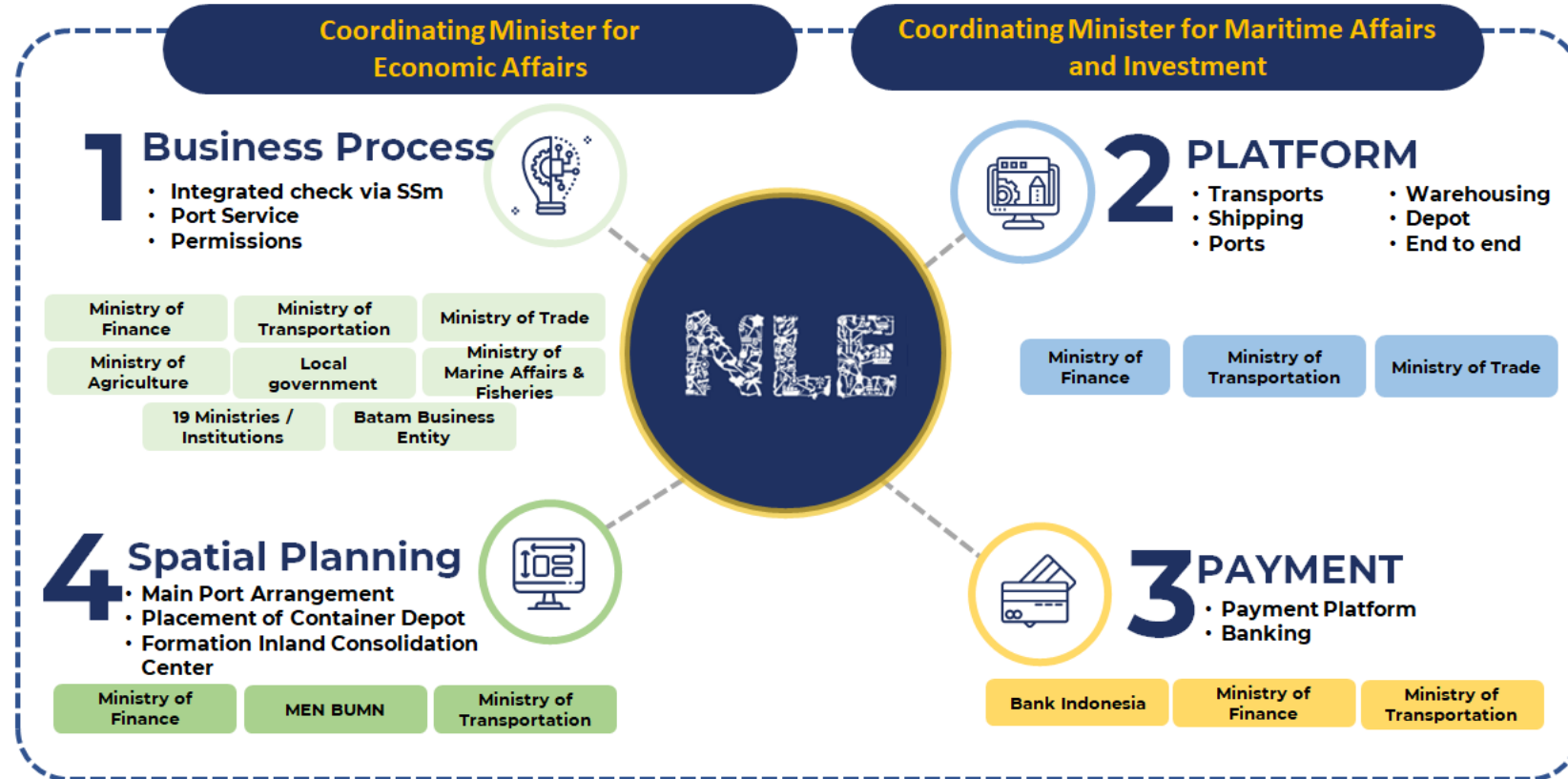
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Digitalization of Logistics Services in Indonesia

Presidential Instruction No. 5/2020 on Structuring the National Logistics Ecosystem

NATIONAL LOGISTICS ECOSYSTEM (NLE)



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NATIONAL LOGISTICS ECOSYSTEM

Progress NLE is currently focusing on integrating a single submission system between institutions and ministries in order to facilitate access to activity permits and database sharing. Furthermore, integration will be developed between institutional/ministerial systems and business actors. Considering cyber security issues, NLE is currently still prioritizing integration between institutions. Although several platforms / service systems have begun to be integrated by several business actors, such as SP2 services, online DO, and port gate passes.



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Indonesian logistics challenges

- The global recession hampered Indonesia's economic growth.
- Global supply chain uncertainty.
- There is a food crisis and energy crisis.
- Russia's unfinished war with Ukraine.
- Global climate change.
- Still high logistics costs.
- Changes in information and communication technology are very fast.
- Limited human resources competent in logistics



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CONCLUSION

- Encouraging national and regional economic growth.
- Collaborate to build regional and global supply chains.
- Developing an environmentally friendly logistics transportation system.
- Increase the efficiency and productivity of logistics services.
- Utilizing new technology to provide logistics services.
- Increase the number of competent resources in logistics



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THANK YOU

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