Focus Group Discussion

Menjawab Tantangan Penguatan Ekosistem KBLBB di Indonesia melalui Skema Pembiayaan Inovatif

Jakarta, 13 Februari 2026

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Indonesia Electric Motorcycle Industry Association (AISMOLI)

E2W2 as Smart Urban Mobility in Indonesia

The growing importance of electric two-wheelers in cities

Electric two-wheelers (E2Ws) are critical for **reducing congestion** and pollution in Indonesia's urban environments, promoting cleaner and more efficient transportation options.

Government initiatives supporting E2W adoption and infrastructure

The Indonesian government sets **ambitious targets**, **13 million E2Ws by 2030,** enhancing policies to foster growth and infrastructure investment for E2Ws.

The role of technology in revolutionizing urban mobility

Innovations in battery technology and **smart solutions** are enabling E2Ws to become more accessible, addressing challenges like range anxiety and supporting overall market growth.

Market Potential & Trends

Key statistics for electric two-wheelers

"139 Mn "

Motorcycle population

2nd globally by fleet size.

“68 E2W companies "

From total 82 2W companies

Rapid growth in 2023-2024

“225,647

Units E2W Registered

As of Dec 2025

“0,9%"

Penetration Rate (FY 2025)

E2W market penetration declined from 1.2% by 2024

“9,956 "

e2W chargers as of Feb25

Estimated growth is 12,000 by 2030

"BaaS"

Led by some companies

Battery-as-a-Service (BaaS) models are gaining traction

Source: Ministry of Industry, Ministry of Transportation, AISI, PLN sharing deck.

Market Potential & Trends

Key statistics for electric two-wheelers

“IDR 1.15 Tn "

Investment

With support of fiscal regulation

“2.5 Mn units"

Capacity production/ year

To fulfil government roadmap

“58% vehicle"

Using lithium-based battery

SLA Graphine 21% and SLA 21%

“40%"

Local content until 2026

Target 60% until 2029 and 80% in 2030

“6 Battery Factories "

Approx. IDR 19 Tn investment

Estimated growth by 2030

“Giant Ecosystem

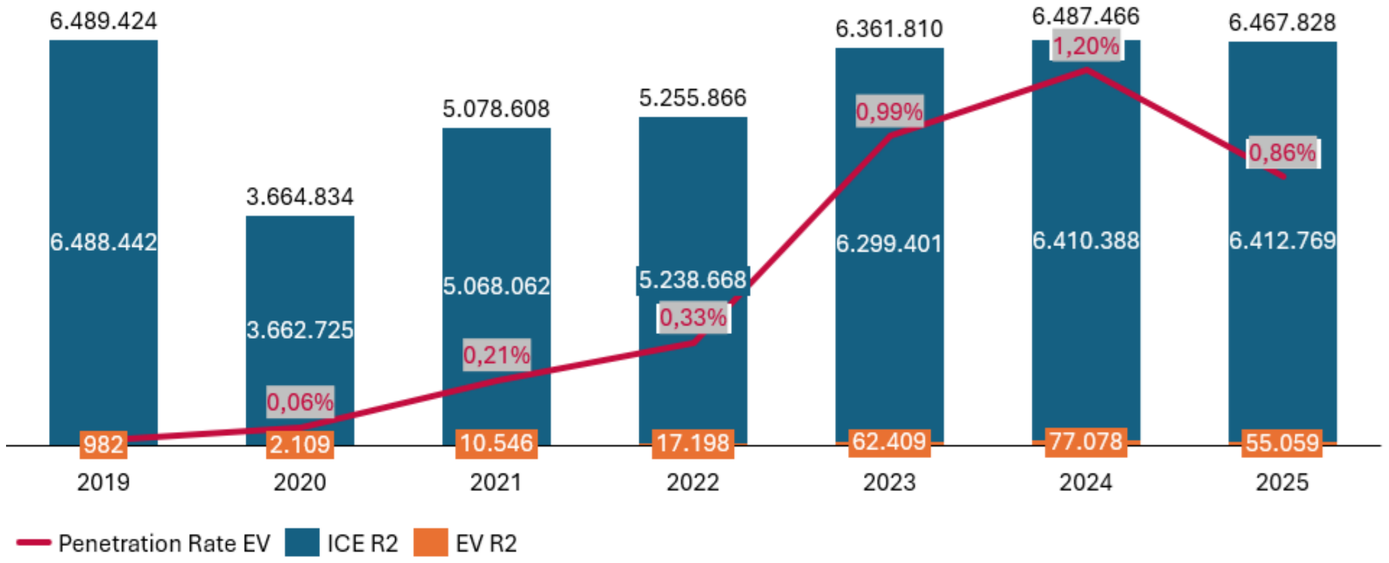
Government Project

Collaboration Mind ID, Antam, IBC & Ningbo Contemporary Brunp Lygent (CBL)

Source: Industry ministry on FGD Battery July3rd 2025

E2W Growth 2019-2025

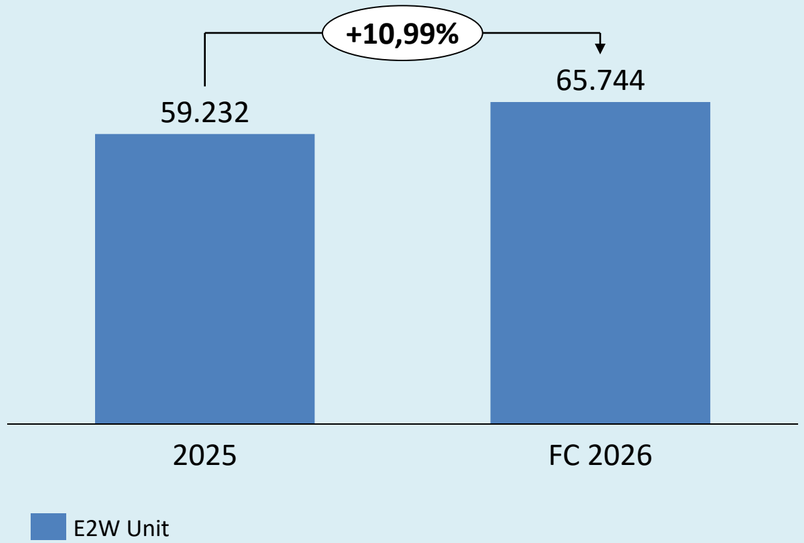
The E2W market in Indonesia continues to grow even without aggressive expansion, proving that baseline demand exists. However, government incentives clearly act as a strong accelerator that significantly increases adoption speed.



Source: AISI report, Transportation Ministry Data

Forecasting 2026

For 2026, we apply a base forecast growth of 10.99%, benchmarked against India's post-subsidy market behavior, reflecting organic demand driven by improving product awareness, infrastructure, and financing availability. This shows that the E2W market in Indonesia can continue to grow even without aggressive purchase subsidies



Financing Challenges

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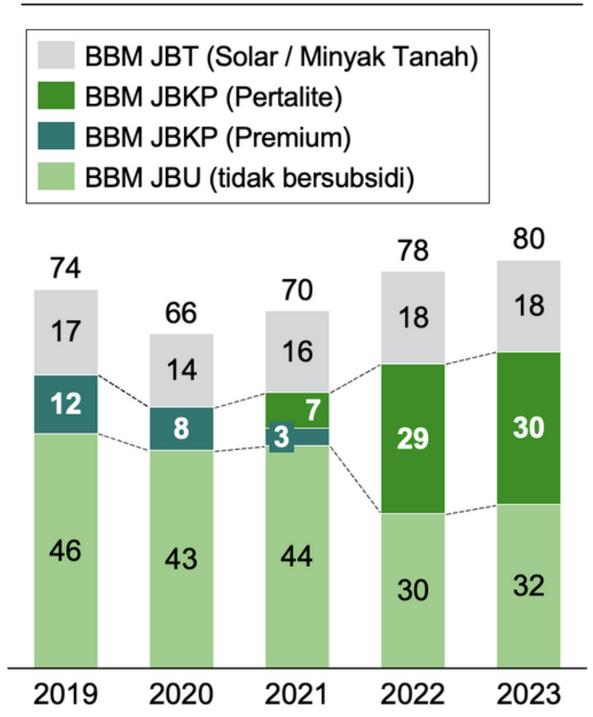
E2W Adoption as a Pathway to Reduce Fuel Subsidy Burden.

The government can substantially alleviate the financial strain of the JBKP fuel subsidy and purchase budget if all gasoline engines are converted to electric.

Indonesia's JBKP fuel requirements have surged 2.5 times in the last five years.

Gasoline Need, 2019-2023
In million kL



The estimated fuel consumption of JBKP for motorbikes constitutes approximately 55% of the total fuel consumption for JBKP and JBU.

	Automobile	Motorcycle
Number of Vehicles	~20 million	~137 million
	X	X
Annual Distance	~10,000 km	~10,000 km
	X	X
Fuel Economy	~10 km/L	~40 km/L
	X	X
Fuel Consumption per Annum	~20 million kL	~34 million kL
	=	=
% Total Fuel Consumption[1]	~32%	~55%

Estimated subsidy for JBKP fuel ranges from IDR 2,000 to 3,000 per liter.

Revvo 90 (Vivo) Fuel Pricing
Rp. 11,950 - 12,990 / L

\-

Pertalite JBKP Pricing
Rp. 10,000 per liter

=

JBKP Pertalite Subsidy Projection
Rp 2,000 - 3,000 / L

The projected expenditure for electric motorbike subsidies in 2025 constitutes merely 6% of the overall cost of JBKP fuel subsidies.

Projected Expenditure for JBKP Fuel Subsidy for Motorcycles

30 million kL
JBKP Fuel Efficiency

X

55%
Fuel Efficiency for Motorcycles

X

Rp 2,000 - 3,000 per liter
JBKP Fuel Subsidy

=

~Rp 33 - 49 trillion
Total Expenditure of JBKP Fuel Subsidy

Projected Expenditure for Electric Motorcycle Subsidies 2025

Rp. 7,000,000
Subsidy per unit

X

200.000
Electric motorcycle sales objective 2025

=

~Rp 1.4 trillion
Total Expenditure on Electric Motorcycle Subsidy

The long-term transition from gasoline motorbikes to electric motorbikes results in savings of IDR 33 - 49 trillion in JBKP fuel subsidy costs by decreasing fuel requirements. This shift also lowers JBKP fuel purchase and import expenses, consequently elevating the fuel independence ratio to over 66.79% (2023).

The residual JBKP + JBU fuel consumption of 8 million kL (13% of the total) is likely attributed to goods vehicles and buses. SOURCE: Ministry of Energy and Mineral Resources 2023 LK, Indonesian National Police Traffic Corps, media articles.

Benchmarking in India

India's success in adopting electric two-wheelers is driven by the FAME programs. FAME I (2015–2019) laid the groundwork, while FAME II (2019–2024) scaled efforts. The programs have significantly boosted the adoption of electric vehicles, reflecting government support for cleaner transportation

FAME I (2015-2019)

- Launched with ₹895 crore (~USD 120M) budget.
- Focus: demand incentives, pilot projects, charging infrastructure.
- Supported over 2.8 lakh electric vehicles, incl. ~2 lakh E2Ws.

FAME II (2020-2024)

- Allocated ₹10,000 crore (~USD 1.2B).
- Focus: shared/public transport and localization of components.
- Target: 1 million E2Ws with up to ₹20,000 per vehicle incentive.
- Catalyzed >90% of E2W sales in 2023 were under FAME II.
- Boosted OEM investment, battery innovation, and jobs.

THE IMPACT

- Over 90% of E2Ws sold in 2023 benefited from FAME II.
- India became the 3rd largest global market for electric two-wheeler.
- Model for ASEAN countries in sustainable mobility policy.
- Generated industrial investment, job creation, and improved air quality in urban centers.

Key Success Factors

1.Government Support	2.Infrastructure Development	3.Market Incentives
Government backing through initiatives like the FAME programs has been critical to India's electric two-wheeler success story.	The establishment of charging stations and related infrastructure plays a vital role in the adoption of electric vehicles.	Incentives for consumers and manufacturers stimulate the electric vehicle market, promoting widespread adoption and sustainability.

Challenges to E2W Adoption in Indonesia

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High battery costs hinder consumer adoption of E2Ws

The **elevated costs** associated with batteries significantly deter buyers and restrict the overall market growth of electric two-wheelers in Indonesia.

Limited financing options make purchases difficult for consumers

Many potential buyers face **challenges in accessing financing**, which complicates their ability to invest in electric two-wheelers despite their benefits.

Public skepticism (range, reliability)

Consumers fear the battery will not last long enough for daily commuting or emergencies.

Infrastructure and resale value concerns

Low consumer trust in battery longevity and unclear resale value undermine market confidence, highlighting the need for battery certification, financing innovation, and a stronger used-EV ecosystem.

Regulatory uncertainties create barriers to market entry

Ambiguous regulations can hinder the **expansion of electric two-wheelers** by creating confusion among manufacturers and potential investors in Indonesia's market.

Opportunities for Growth in Electric Two-Wheelers

Investment in Infrastructure to Support E2W Expansion

Strategic investments in charging stations, BaaS and maintenance facilities will **enhance accessibility** and convenience for users, driving **greater adoption** of electric two-wheelers.

Local Manufacturing for Cost Reduction and Support

Encouraging local manufacturing can significantly reduce costs, creating jobs and fostering an **eco-friendly industry** that supports sustainable practices within Indonesia's economy.

Consumer Financing Solutions to Boost E2W Sales

Innovative financing options will make electric two-wheelers more accessible to a broader audience, reducing barriers to purchase and increasing overall **market penetration**.

Urban Congestion as a Catalyst

As Indonesia’s cities struggle with rising traffic and air pollution, electric two-wheelers offer a clean, agile, and scalable solution for personal and commercial urban transport

Strategic Actions to Overcome E2W Adoption Barriers

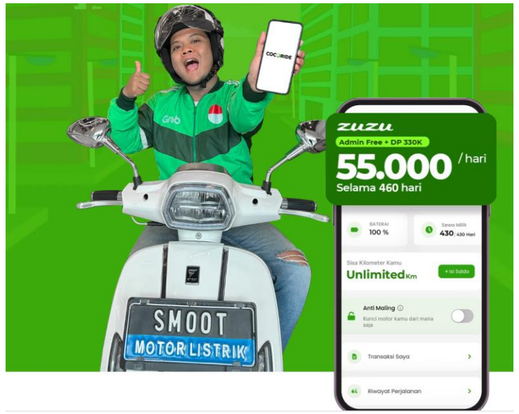
Uncertainty of Subsidy Program

Build Smarter E2Ws through Local Innovation

Boost local R&D to create electric motorcycles that fit Indonesia's real needs—affordable, durable, and ready for delivery, ride-hailing, and rural use

Make EVs Affordable with New Business Models

Unlock E2W growth through Battery-as-a-Service, leasing, and creative financing—so more people and businesses can switch without high upfront costs



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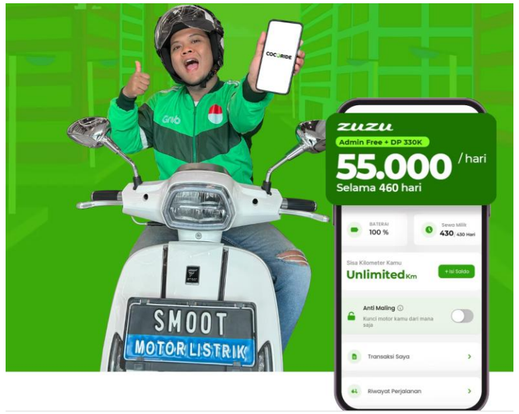


Supportive Policies for E2Ws Growth

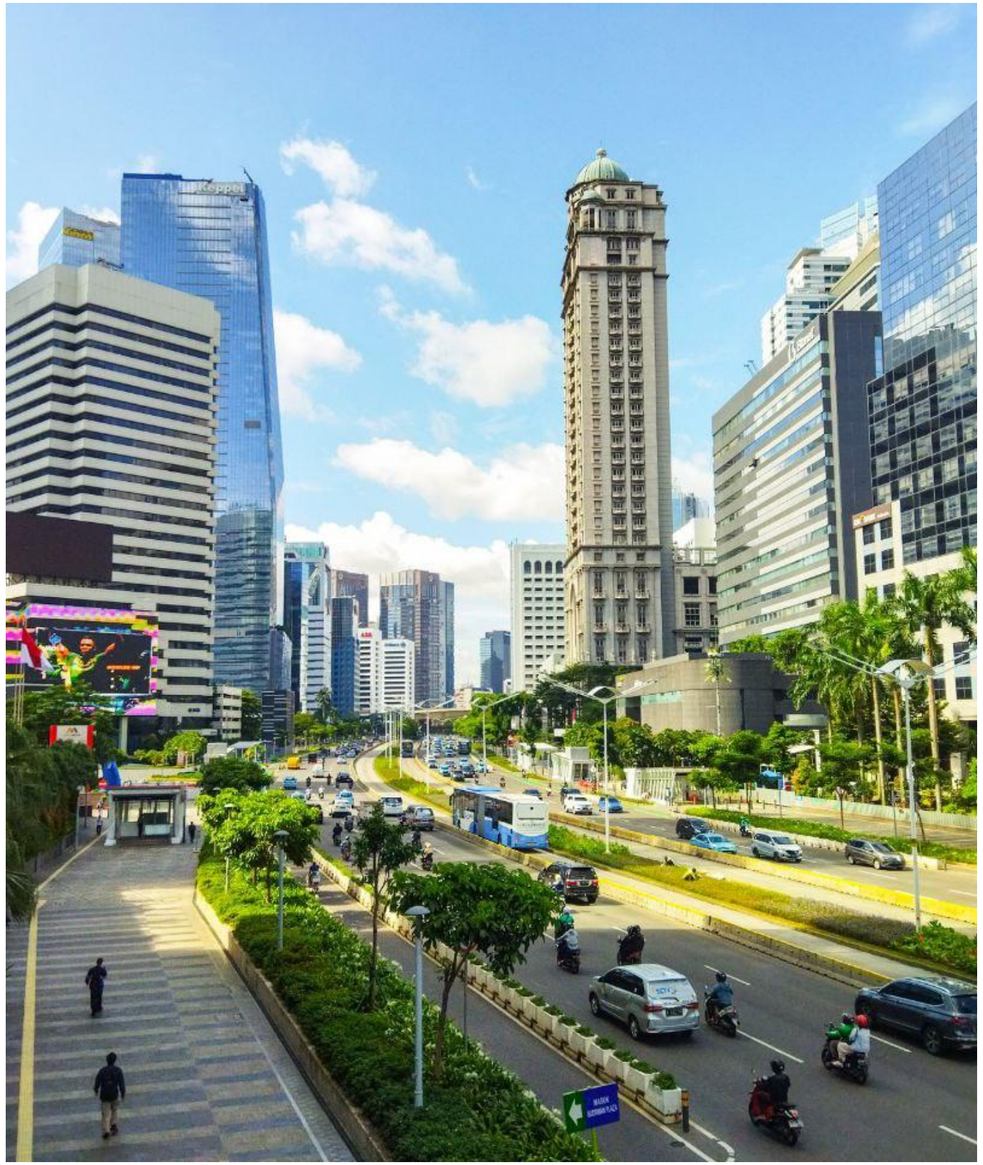
Government policy and industry associations play a central role in shaping and accelerating the key drivers of electric two-wheeler (E2W) growth in Indonesia.

In 2025 onwards, **E2W growth in Indonesia will be driven by aggressive non-fiscal program, expanding swap infrastructure, rising urban mobility challenges, and increasing model variety**—supported by a strong policy framework and active collaboration with associations like AISMOLI (Indonesia Electric Motorcycle Industry Association) in facilitating industry alignment and stakeholder coordination.

Conclusion

Moving Toward a Cleaner, Smarter Urban Future

- The transition to electric two-wheelers (E2Ws) is a national priority that supports Indonesia’s goals for reduced fuel dependency, cleaner air, and green urban mobility.
- AISMOLI and other E2W industry associations play a vital role in building a strong industry foundation—by advocating consistent government support, enabling local industry growth, and ensuring alignment with national targets such as the adoption of 13 million E2Ws by 2030 and the achievement of Net Zero Emissions by 2060.



Thank You

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