

# Strong Take-up Signals Intensifying Demand for Infrastructure-Linked Projects



## Executive Summary

- A total of 200 hectares of new industrial estate land entered the market in 2025—including the Jatiluhur Industrial Smart City – with development increasingly concentrated in locations offering direct access to major transport infrastructure.
- Demand remained strong in 2025, with full-year take-up reaching about 218 hectares—driven mainly by the automotive and EV ecosystem, followed by hyperscale data-center operators and modern logistics players expanding their regional networks.
- Cikarang and Karawang continued to outperform with industrial land prices rising 5–6% y-o-y, while the western and southern corridors saw steadier 1–2% growth, reinforcing the eastern corridor as the strongest value-appreciation play for investors and developers.

Table 1. Greater Jakarta Industrial Estate Market Statistics

Corridor	Total Stock (ha)	Occupancy (%)	Land Price (Rp/sqm)
Jakarta	1,761	97.1	N/A
Eastern Corridor	10,588	90.7	2.60 million
Southern Corridor	165	91.5	2.89 million
Western Corridor	2,943	90.6	2.11 million

Source: CBRE Research, Q4 2025

## Supply

A total of 200 hectares of new industrial estate land entered the market in 2025, marking a notable expansion in response to sustained demand from manufacturing, logistics, and data-driven industries.

One of the most significant new entries is the Jatiluhur Industrial Smart City. Positioned within the Rebana Metropolitan growth region, the project enhances the industrial landscape by offering modern, scalable land options supported by proximity to major transport assets such as Kertajati Airport and Patimban Port. Overall development trends continue to be shaped by access to major transport infrastructure, as occupiers increasingly prioritize seamless logistics connectivity.

By end-2025, Greater Jakarta’s total industrial estate land stock reached approximately 15,456 hectares, reinforcing the region’s role as the country’s most mature and strategically linked industrial hub.

## Demand

Industrial estate land demand in Greater Jakarta remained robust in 2025, with Q4 take-up reaching approximately 129 hectares, bringing the full-year total to around 218 hectares. Demand continued to be driven primarily by the automotive sector—especially electric vehicle (EV) and component manufacturers—which remained the dominant occupier group as Indonesia’s EV ecosystem gained momentum. This was followed by growing requirements from hyperscale data-center operators, supported by rising digital infrastructure investment, and by sustained interest from modern logistics players expanding their regional distribution networks.

The Eastern Corridor, extending through Bekasi, Karawang, and Subang, remained the preferred location for large-scale industrial users, reinforcing its role as the country’s key production base for automotive and EV-related industries due to its mature estate ecosystem, established supply chains, and strong transport connectivity.

Figure 1. Industrial Estate Land Cumulative Supply-Demand-Occupancy



Source: CBRE Research, Q4 2025

Figure 2. Industrial Estate Land Price By Area



Source: CBRE Research, Q4 2025

## Price

Industrial estate land prices in Greater Jakarta continued their upward trajectory in 2025, supported by robust demand from automotive, EV-related industries, data-center operators, and modern logistics players. The most pronounced increases were observed in Cikarang and Karawang, where sustained interest from large-scale manufacturers and strong absorption drove prices up by 5–6% throughout 2025, marking these areas as the fastest-growing industrial locations in the region.

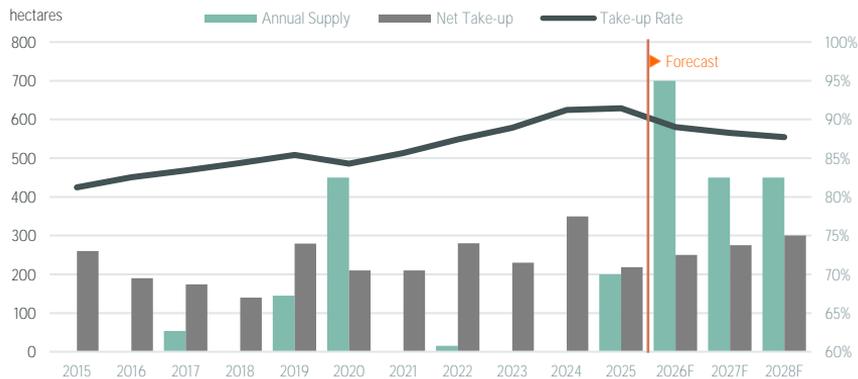
In contrast, industrial estates in the western and southern corridors experienced more moderate price movements, with annual growth averaging 1–2% compared to 2024. While these regions remain attractive for select industries, their slower growth reflects a comparatively smaller concentration of large occupiers and more limited catalyst infrastructure relative to the eastern corridor, which continues to dominate demand and price momentum.

## Outlook

Greater Jakarta is expected to remain the primary destination for industrial and manufacturing investment, supported by strong infrastructure and a mature ecosystem for key sectors such as automotive and EV, electronics, data centers, and modern logistics. These advantages continue to anchor the region’s competitiveness relative to emerging industrial hubs.

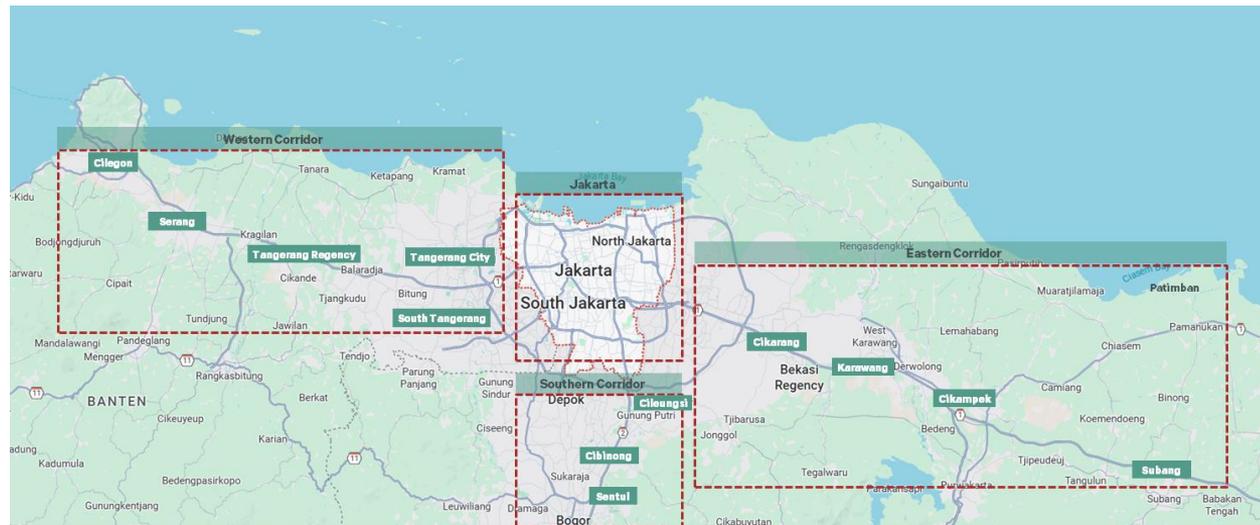
Supply is set to increase, with around 700 hectares planned for launch in 2026, largely driven by two major projects in Cikarang and Karawang. This marks one of the largest single-year additions and will significantly expand land availability in the eastern corridor. Demand is projected to stay positive, though the sizable incoming supply is expected to ease occupancy levels to around 89%. Even so, well-located, high-performing estates—particularly those with strong connectivity and established ecosystems—are anticipated to continue achieving land price growth.

Figure 3. Industrial Estate Land Annual Supply-Demand-Occupancy Forecast



Source: CBRE Research, Q4 2025

## Greater Jakarta Map



### Definitions

Greater Jakarta (Jabodetabek) forms the country's largest and most established industrial estate market, spanning interconnected western, eastern, and southern corridors that link manufacturing clusters, logistics nodes, and major urban centers across Jakarta, Bogor, Depok, Tangerang, and Bekasi.

Greater Jakarta serves as the central economic engine, supported by extensive transport infrastructure—including toll road networks, ports, airports, and rail systems. This combination of strong connectivity, large consumer markets, and mature industrial ecosystems makes Greater Jakarta one of the most dynamic and competitive industrial regions in Southeast Asia, continuing to attract investors, manufacturers, and logistics operators seeking scalable and strategically located operations.

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