

# INDONESIAN ELECTRONICS PRODUCTS



## WHAT'S INSIDE

The Indonesian government has designated electronics industry as one of its priority industries to help boost non-oil-and-gas export to the international market. While Indonesia's contribution is still relatively small, there are already a number of home-grown electronics makers which are ready to export their products abroad.

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Dear Valued Readers,

Welcome to the April edition of Export News. The Directorate General of National Export Development (DGNED) of the Indonesian Ministry of Trade strives to provide the latest information on Indonesian leading export products. This month, we are bringing to you electronics products.

The Indonesian electronics industry is keep developing from time to time. In the modern era, it is unthinkable that a household could live without electronics appliances. The government recognizes the advancement in electronics industry as an opportunity by including domestic products in its new policies.

Indonesian electronic products have huge opportunities to expand their export markets to various countries because now the quality is much better. The Indonesian products now can penetrate markets which were previously dominated by electronics goods from developed countries such as China, Germany, Hong Kong and the United States, which has strong image for its quality and technology advancement. As of end of 2013, Indonesia has exported US\$10 billion worth of electronics products.

The April edition of Export News discusses the export development and other information on Indonesian electronics products to allow you to make informed decisions in procuring electronics products. A list of major Indonesian electronics producers are included in this edition of Export News allowing you to contact them directly.

Thank You

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## *hot* issue

### Indonesian Electronics

Everyday life of the modern society is inseparable from electronics and electric goods right from early in the morning when we start the day to late in the evening when we return to our beds. There are plenty of electronics goods making our daily life easier from household appliances such as refrigerators, washing machines and vacuum cleaners to communication gadgets such as smartphones and tablets.

Indonesia is the largest economy in ASEAN with some 245 million people and has an increasing number of middle class families. As the number of families with dispensable income increasing, so is the amount of money being used to buy electronics and electrical goods. Huge number of population and middle class families have enticed a number of major electronics producers to enter Indonesia not only to tap its huge market potentials but also to turn the country into a production hub. Having Indonesia as a production base has a two-pronged

benefit. Electronics makers can market their products domestically while at the same time export their products, taking advantage of a huge pool of skilled workers with competitive wages.

Among the major electronics makers making such step is Japanese brand Sharp through PT Sharp Electronics Indonesia (SEID) which opened a new factory in the Karawang International Industrial City (KIIC) in Karawang, West Java on Feb. 12, 2014. The factory is Sharp's world largest factory producing electronic home appliances.

Standing on a 31-hectare plot of land, the factory produces twin tub washing machines and small to medium refrigerators with a maximum capacity of 300 liters. The factory has a capacity to produce 220,000 units of refrigerators and 140,000 units of washing machines per month. These production figures are twice the capacity of Sharp's first factory in Pulogadung, East Jakarta.

Sharp focuses on refrigerators and washing machines to meet the ever increasing demands as well as complementing Sharp's other products of TV and air conditioners.

Meanwhile, a number of gadget makers – cell phones and tablets – are planning to open their production lines in Indonesia. PT Tera Data Indonusa, for example, is planning to produce Axioo smartphones while PT Hartono Istana Technology will produce

smartphones under the brand Polytron. Other brands which are reportedly planning to open their production lines include Advan and Cross.

Polytron smartphones are previously being manufactured in China. On the other hand, Polytron has three manufacturing facilities in Indonesia producing a wide array of electronics appliances ranging from audio and video products, such as LED and LCD television sets, Hi-Fi audio sets, Compo, home theater sets, and speakers – home appliances such as refrigerator, washing machine and air conditioner.

Another domestic powerhouse in the field of electronic home appliances is PT Maspion which plans to open another manufacturing facility in Kendal, Central Java. The company already has three factories in Sidoarjo, East Java, and each one factory in Surabaya and Gresik, also in East Java, and another one in Bekasi, West Java. Seeing the ever increasing potentials, Maspion plans to open a new factory in Kendal, Central Java, which will produce a number of household goods.

There are many others manufacturers which have operate in Indonesia selling their products not only at home but also exporting them all over the world. In fact, some manufacturers have made Indonesia their production bases for certain products. This will allow the contribution of electronics and electrical goods to Indonesian export to keep increasing.

# INDONESIAN ELECTRONICS MARKET

Electronics products research agency Growth From Knowledge (GfK) Indonesia recorded that the market value of 40 electronics products in Indonesia in 2010 reached Rp 83 trillion or increasing by 17% from the figure in 2009. GfK Indonesia account manager Grace Maringka said that in general consumers change their consumption pattern – by considering quality more -- when the income per capita reaches US\$3,000.

“Based on GfK research in more than 40 types of electronics goods, more than 40% of market value is contributed by telecommunication devices, ie mobile phones and smartphones. The digital world is getting closer with our lives,” she said.

The GfK research found that more than 80% of electronics products sold in Indonesia was priced below Rp 2 million (US\$) reflecting the purchasing power of the customers.

Meanwhile, the Electronics Industries Association (Gabel) expected domestic electronics sales in 2014 to reach some Rp 44 trillion, increasing from Rp 38.5 trillion in the previous year. Gabel chairman Ali Soebroto Oentaryo, however, was concerned with the weakening rupiah against the greenback would affect achieving the sales target.

“Rupiah depreciation has caused the prices of imported electronics goods to increase by 20%. The prices of local electronics items also increased because the production cost is increased by 20% because some of the components are still imported,” Ali said.

He said, however, the price increase would be incremental in several stages at between 2% and 3% in each stage.

Separately, the Electronics Marketer Club (EMC) chairman Rudyanto said the price increase would

not follow rupiah depreciation due to competition.

“The price increase would be varied ranging from 5% to 15%. Products with high competition will have lower increase rate, less than 15%,” he said.

Overall, televisions still dominates the market with a 34% of the total sales followed by other home appliances such as air conditioner, refrigerator and washing machine at a combined share of 40%.

Rudyanto said the growth in 2014 electronics sales would be boosted by items which penetration rates were still low.

“Consumers would delay buying electronics items with high rate of penetration. They will wait if they want to buy a new one,” he said. “But they will have to buy a new electronics item if the customers have not already have one.”

Indonesia eyes a growth of 10% in the next four years for electronics industry with currently 235 companies in the sector. Electronics is one the priority industries for further development. The government keeps supporting the industry so that it can meet the world's demands by creating conducive business atmosphere such as by providing tariff and taxation incentives and safeguarding the domestic market by roughly 6%.

Technology and product advancements have led to faster emergence of new products which are more sophisticated. In the past 10 years, the product cycle has become much shorter. New products are springing up every two years otherwise they will be beaten by the competition.

The improving condition of the world's economy has brought advantages for Indonesian export. Currently, export of electronics products have spurred export growth in various countries.

## Indonesian Electronics Products Based on the 6-Digit HS Code

NO.	HS	Product Description
1	851712	Telephone For Cellular Networks Or For Other Wireless Networks
2	851770	Parts Of Telephone Sets
3	851762	Machines For The Reception, Conversion And Transmission Or Regeneration Of Voice, Images Or Other Data (Incl. Switching And Routing Apparatus)
4	847130	Portable Digital Automatic Data Processing Machines, Weighing < 10 Kg, Consisting Of At Least A Central Processing Unit, A Keyboard And A Display
5	854239	Other Of Electronic Integrated Circuits
6	852990	Parts (Except Antennas And Reflectors) For Use With Radio Transmission, Radar, Radio Navigational Aid, Reception And Television Apparatus, Nesoi
7	853690	Electrical Apparatus For Switching, Protecting Or Making Connections To Or In Electrical Circuits, For A Voltage Not Exceeding 1,000 V, Nesoi
8	844391	Parts & Accessories Of Printing Machinery Used For Printing By Means Of Plates, Cylinders & Other Printing Components Of Heading 84.42
9	853400	Printed Circuits
10	854231	Electronic Integrated Circuits, Processors & Controllers, Whether/Not Combined With Memories, Converters, Logic Circuits, Amplifiers, Clock & Timing
11	841510	Air Conditioning Machines, Window Or Wall Types, Self-Contained, Comprising A Motor-Driven Fan And Elements For Changing The Temperature And Humidity
12	853720	Boards, Panels, Consoles, Etc. With Electrical Apparatus, For Electric Control Or Distribution Of Electricity, For A Voltage Exceeding 1,000 V
13	844399	Other Parts & Accessories For Printing Machinery Excl. 8443.91
14	903289	Automatic Regulating Or Controlling Instruments And Apparatus (Excluding Thermostats, Manostats And Hydraulic Types), Nesoi
15	847330	Parts And Accessories For Automatic Data Processing Machines And Units Thereof, Magnetic Or Optical Readers, Transcribing Machines, Etc., Nesoi
16	853890	Parts For Electrical Apparatus For Electrical Circuits, Boards, Panels Etc. For Electric Control Or Distribution Of Electricity, Nesoi
17	847150	Processing Units For Automatic Data-Processing Machines, Digital, Whether Or Not Containing In The Same Housing One Or Two Of The Following Types Of U
18	852290	Parts And Accessories, Except Pickup Cartridges, For Sound Reproducing, Sound Recording, And Video Recording Or Reproducing Apparatus
19	854140	Photosensitive Semiconductor Devices, Including Photovoltaic Cells; Light-Emitting Diodes
20	847170	Storage Units For Digital Automatic Data-Processing Machines.
21	853710	Boards, Panels, Consoles, Etc. With Electrical Apparatus, For Electric Control Or Distribution Of Electricity, For A Voltage Not Exceeding 1,000 V
22	850440	Electrical Static Converters
23	844332	Other Printers, Copying Machines & Facsimile Machines, Whether/Not Combined , Exclud The Ones Which Perform Two/More Of The Functions Of Printing, Cop
24	853931	Electric Discharge Lamps (Other Than Ultraviolet Lamps), Fluorescent, Hot Cathode
25	852872	Other Colour Reception Apparatus For Television, Whether/Not Incorporating Radio-Broadcast Receivers/Sound/Video Recording/Reproducing Apparatus,
26	854370	Other Machines & Apparatus For Electrical Machines & Apparatus, Other Than Than Machines & Apparatus For Electroplating/ Electrolysis/Electrophoresis/
27	853650	Electrical Switches For A Voltage Not Exceeding 1,000 V, Nesoi
28	854110	Diodes, Other Than Photosensitive Or Light-Emitting Diodes
29	844331	Machines Which Perform Two Or More Of The Functions Of Printing, Copying Or Facsimile Transmission, Capable Of Connecting To An Automatic Data Process
30	902690	Parts And Accessories For Instruments And Apparatus For Measuring Or Checking The Flow, Level, Pressure Or Other Variables Of Liquids Or Gases, Nesoi

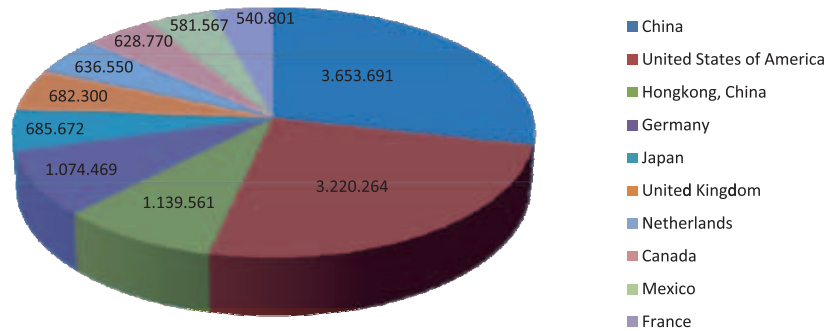
## World's Import

The world's import of electronics is showing a rebound in the past five years although it has not yet reached the 2008's level of US\$24.37 billion. The figure fell sharply to US\$16.44 billion in 2009, due to the prolonged global financial crisis. In 2010, there was a sign of recovery with an import of US\$18.48 billion. The recovery continued with US\$19.30 billion and US\$20.63 billion in 2011 and 2012 respectively.

In 2012, China was the top importer with US\$3.66 billion or 17.71% of the total import while the

United States followed closely with US\$3.22 billion (15.61%). Hong Kong was third with US\$1.14 billion (5.52%), Germany imported US\$1.07 billion (5.21%) and Japan imported US\$685.67 million (3.32%). The United Kingdom was the sixth largest with US\$682.30 million followed by the Netherlands (US\$636.55 million), Canada (US\$628.77 million), Mexico (US\$581.57 million) and France with US\$540.80 million. Ranked at the 36th place, Indonesia imported US\$83.97 million of electronics or 0.41% of the total world's import.

### Top 10 Importing Countries for Electronics (US\$ 000)



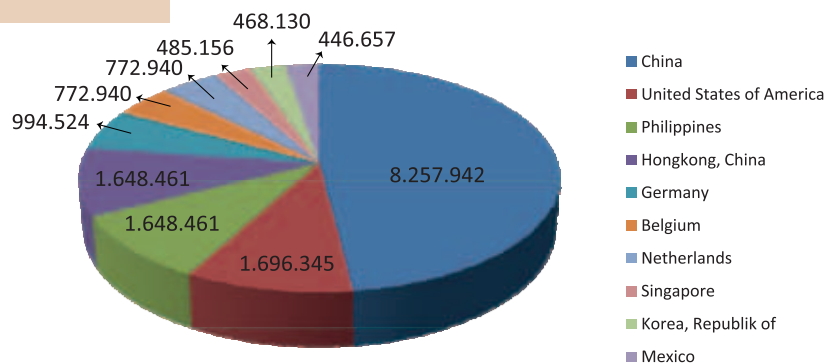
Sources : ITC calculations based on UN COMTRADE statistics.

## World's Export

The world's export of electronics dropped from US\$27.50 billion in 2008 to US\$20.09 billion in 2012. China dominated the world's market in 2012 by sending US\$8.25 billion or 41.10% of the world's total export. The United States was in the second distant after shipping US\$1.70 billion or 8.44%

and followed by the Philippines with US\$1.65 billion (8.21%), Hongkong exported US\$1.31 billion (6.55%) and Germany shipped US\$994.5 million (4.95%). Indonesia's market share was 1.53% of the world's export at the 13th place.

### Top 10 Exporting Countries for Electronics (US\$ 000)



Sources : ITC calculations based on UN COMTRADE statistics.

## PROSPECTS FOR ELECTRONICS BUSINESS

Data from the Central Statistics Agency (BPS) shows that production growth for computers, electronics and optics in 2013 reached 9.32%, slowing down from 10.34% in 2012. Despite the growth rate is slowing down, the government was still upbeat that the production growth for electronics goods in 2014 would still be able to reach 10%.

Indonesian export is still dominated by Machines Which Perform Two or More of the Functions of Printing, Copying or Facsimile Transmission, Capable of Connectin to ann Automatic Data Process which falls under HS 844331. The export in 2013 reached 53.9 million tons with a value of US\$1.08 billion, or 10.20% of Indonesia's total electronics export.

The second most exported item is Telephone Sets; Base Station which is grouped under HS 851761. The total export weighed 11.96 million tons at a value of US\$677.80 million. In the past five years, the product show a significant growth of 242.03%.

Another major contributor for Indonesian electronics export is those categorized under HS 852190, Video Recording or Reproducing Apparatus other than Magnetic-Type, which weighed 27.99 million tons for a value of US\$561.87 million.

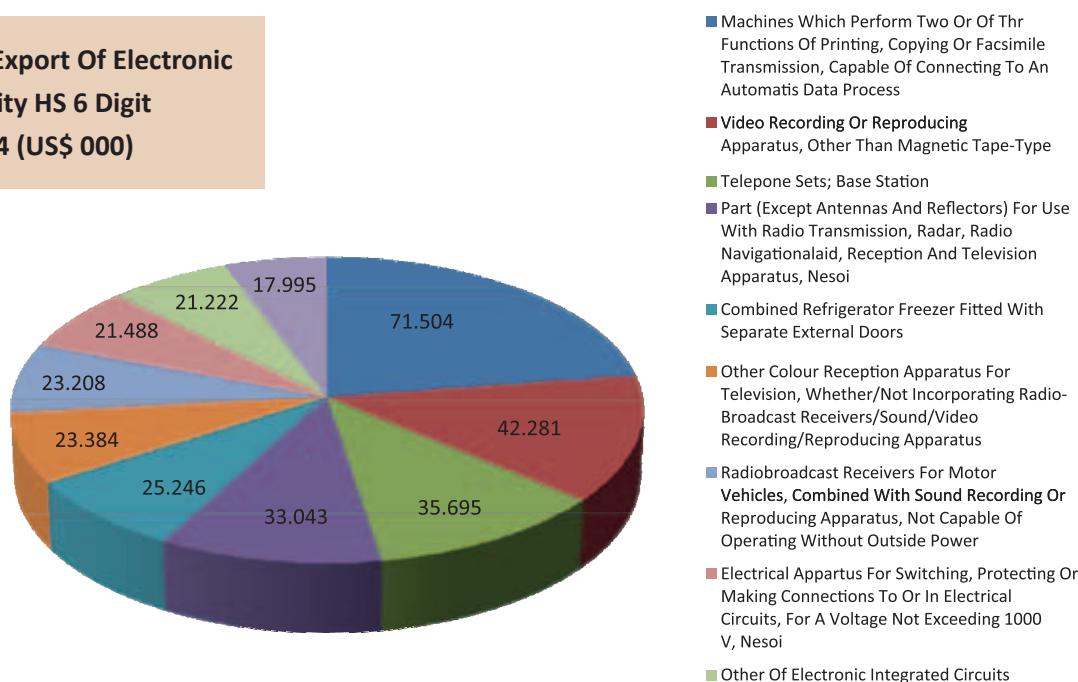
Singapore was the top destination for Indonesian electronics products in 2013 with a share of 23.88%. The United States was second with 12.63% followed by Japan (10,70%), Hongkong (5,00%) and Germany (4,03%) in the fifth place. South Korea was in the sixth place with a share of 3,70% and followed by China (3,40%), France (3,31%), the Netherlands (3,02%) and Thailand (2,39%).

Sources : ITC calculations based on UN COMTRADE statistics.

The Indonesian government puts electronics as one of its major export commodities and pay huge attention to the industry. The Directorate General for National Export Development (DGNED) of the Ministry of Trade conducts various promotion activities to increase the export of non-oil-and-gas exports, including electronics products.

The government also call business players to take advantage various facilities in existing free trade agreements such as the ASEAN Free Trade Agreement (AFTA), the ASEAN-China FTA, the ASEAN-Korea FTA and Indonesian-Japan Economic Partnership Agreement (IJEPA). Those FTAs provide the opportunities to increase export of electronics

**Indonesian Export Of Electronic By Commodity HS 6 Digit January 2014 (US\$ 000)**



Source: Central Board of Statistics, prepared by Dit. of Market Dev. & Export Information, Dit. Gen. NED



goods and, more importantly, churning out high-quality products and maintain a sustainable supply.

### Polytron

Polytron is an indigenous, well known electronics brand in Indonesia. The history started on May 16, 1975 when the owner of cigarette maker PT Djarum Kudus established PT Indonesia Electronic dan Engineering with a capital of Rp 50 million to produce electronics goods. As a cigarette maker expanding to electronics industry, the company set it clear that it did not want to involve any foreign capital or partner. Since its establishment, Polytron does not have a principal so it does not have to pay royalties to every product it makes.

In 1977, the company recruited 14 female graduates of senior high school and business vocational high school to get soldering training, turning electronics components into electronics products. The components were sourced from Singapore. After the training ended, the Kudus-based factory imported components from Belgium to start a technology transfer process from Philips-MBLE, Belgium. The company launched its first TV product under the brand Polytron. It was a flop due to its huge size and still needed speaker boxes preventing customers who were looking for practical products. The factory suffered from marketing failure as its

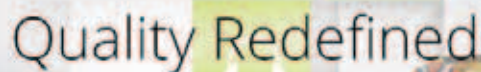
product was refused by electronics stores. The company's president director was even reportedly chased out of a electronics store when offering the first Polytron product. However, realizing that they were cigarette makers who were venturing into electronics industry, the company was determined to undergo the tough times as an opportunity to learn.

The company then shifted from European technology to Hong Kong technology. Using components sourced from Hong Kong, the company launched a 20-inch black and white TV. The company also established a research and development unit allowing it to produce its own design. The company also cooperated with Finnish TV maker Salora (now Nokia) for technology transfer.

PT Indonesia Electronic dan Engineering changed its name into PT Hartono Istana Electronics and in 2000 was changed again into PT Hartono Istana Teknologi. Inline with the name change, the company has managed to develop energy efficient color TV with the sizes of 17-, 20- and 26- inch consuming only 40 watts. The company even claims to have produced TV which consumes only 20 watts of energy, claimed to be the first in the world. Polytron is being exported to various countries although it has to be sold under different brands to make it acceptable at European markets.



## LIST OF EXPORTERS



Quality Redefined

### **HARTONO ISTANA TEKNOLOGI, PT**

Jl. Aipda KS Tubun II /15, Jakarta 11410  
Phone : (62-21) 5322663, 5330987, 5322663  
Fax : (62-21) 5302235, 5302225  
Email : marketing@polytron.co.id,  
export@polytron.co.id,  
rocky.yulius@polytron.co.id  
Website : www.polytron.co.id

### **PANGGUNG ELECTRIC CITRABUANA, PT**

Jl. Raya Waru No. 1, Waru, Kureksari, Sidoarjo, East Java 61256  
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Email : panarecexport@panggung.com,  
primadi@akari-corp.com  
Website : www.panggung.com

### **LG ELECTRONICS INDONESIA, PT**

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Website : www.lg.com

### **SAMSUNG ELECTRONICS INDONESIA, PT**

Jl. Jababeka Raya Blok F No. 29-33, Cikarang, West Java 17530  
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### **STAR COSMOS INDONESIA, PT**

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### **MASPION, PT**

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45044872  
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