

RUBBER AND RUBBER PRODUCTS

WHAT'S INSIDE

Indonesia has become a major exporter of rubber and rubber-based products.

With high volume of natural rubber productions and expanding rubber-based industry, Indonesia is ready to fulfill the global demands of quality rubber and rubber-based products.

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**DIRECTORATE GENERAL OF
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Dear Valued Readers,

Rubber is one of Indonesia's leading export products and a major raw materials for other leading export products such as tires, gloves and other rubber-based products. Indonesia is one of the world's three major rubber producer together with Malaysia and Thailand.

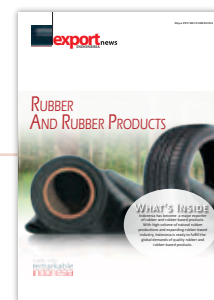
Indonesia is known as a major producer of quality rubber and rubber-based products thanks to vast rubber plantations, abundant natural rubber productions and the expanding capacities of rubber-based industries. The fact that it is easy to find Indonesian-made tires abroad is a proof that Indonesian products are well accepted in international markets.

This February edition of Export News discusses the rubber sector especially on its export development and other important information to facilitate readers in buying Indonesian-made rubber and rubber-based products. The edition also includes a list of exporters for rubber and rubber-based products which can be contacted directly.

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Thank You

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hot issue

RUBBER AS PART OF WORLD'S AUTOMOTIVE INDUSTRY

European countries and the United States are still recovering from the global financial crisis several years ago. The recovery allows automotive industry, the largest industry in both sides of the Atlantic, to increase its production. A number of automotive producing countries, such as Germany and Spain, have begun to show increases in the sector. In other parts of the world, Asian countries have also shown significant increase in the sector. Other than Japan which already has become the industry leader, South Korea and China are also becoming major players. According to the International Rubber Study Group (IRSG)'s estimate, China will become the world's largest consumer of natural rubber in 2020. China consumed 3.85 million tons of natural rubber in 2012 and it is estimated to reach 6.54 million by 2020.

The development in automotive sector, which requires rubber-based parts such as tires, becomes an opportunity for world's rubber exporters. As one of the world's major rubber exporters, Indonesia has a huge potential in the upstream side. The area of rubber plantation increased in 2012 by 1.43% to 3.5 million hectares when compared



to the area in 2011. Production also increased by 1.64% to 3.04 million tons in 2012 while production in 2013 was 3.18 million. The figures show that Indonesia has the potential to fulfill the needs of rubber-based industry in the international market.

On the other hand, the Indonesian government is currently trying to increase rubber added-value so that the future rubber export will be more varied instead of mere raw material. Indonesia also made an agreement with the International Tripartite Rubber Council (ITRC) through the Agreed Export Tonnage Scheme (AETS) in 2002, 2009 and October 2012-March 2013 which aimed to maintain rubber price in the international market.

The Indonesian government policy and the agreement with international organization has spurred further development of local rubber processing industry by absorbing larger amount of raw rubber. Indonesian tire makers are keep growing by having the largest export value when compared to other rubber-based products. The tire makers are grouped in the Indonesian Tire Manufacturer Association (APBI).

Abundant natural rubber and ever-growing industries of tire and other rubber-based products are Indonesia's two excellence to meet demands at the international market.

SPECIAL MEETING OF THE INTERNATIONAL TRIPARTITE RUBBER COUNCIL (ITRC)

The meeting was held in Bangkok, Thailand, on March 13-14, 2014, and was attended by officials from Indonesia, Malaysia and Thailand. The meeting discussed abundant natural rubber stock in the international market which is expected to affect natural rubber price.

ITRC took a number of steps to face the condition, among others by establishing the Demand Promotion Scheme Committee (DPSC). The committee is tasked to design a strategy to increase rubber domestic consumption in the three countries. The committee is also responsible to strengthen cooperation in developing rubber-based products in the global market. Currently ITRC has started discussion with other natural rubber producers such as Cambodia and Vietnam, which represent some 10 percent of global natural rubber production.

The International Rubber Consortium Limited (IRCo) predicted that demands for natural rubber in the international market will increase in 2014 as economic conditions in major rubber importing countries are recovering. If the prediction is correct, we can expect that natural rubber price will increase in the coming months.

SOURCES:

- 1 Ministry of Trade : www.kemendag.go.id
- 2 Directorate General for National Export Development : djpen.kemendag.go.id
- 3 Ministry of Agriculture : www.pertanian.go.id
- 4 Statistics Indonesia : www.bps.go.id
- 5 International Rubber Consortium Limited (IRCo) : www.irco.biz
- 6 International Trade Centre: www.trademap.org
- 7 International Rubber Conference Organisation: www.internationalrubberconference.org



INDONESIAN RUBBER AND RUBBER PRODUCTS

Market Review

Rubber is generally divided into two groups: raw natural rubber under Harmonized System (HS) 4001 and rubber finished products are grouped under HS 4002 through HS 4017. The followings are Indonesian rubber and rubber-based products under 4-digit HS code :

Together with Malaysia and Thailand, Indonesia is the world's major natural rubber producer under the ITRC producing some 60% of the world's total production. Indonesia has a vast rubber plantation. The majority of the plantations are located in South Sumatra, North Sumatra, Jambi and Riau province. The development of rubber plantation can be seen in the graph below:

Indonesian Rubber and Rubber-based Products Based on 4-Digit HS Code DEVELOPMENT OF INDONESIAN RUBBER PLANTATION AREA (Hectare)

No	HS	Product description
1	4001	Natural rubber, balata, chicle etc, prim form etc
2	4002	Synth rubber & factice, inc nat-syn mk, pr fm etc
3	4003	Reclaim rub in primary form/plates, sheets/strip
4	4004	Waste of rub, exc hd rub, & powder obtain thereof
5	4005	Compounded rubber, unvulcanised, primary forms etc
6	4006	Unvulc rubber forms nesoi & unvulc rubber articles
7	4007	Vulcanized rubber thread and cord
8	4008	Plates, sheets, profile shapes etc, soft vulc rubber
9	4009	Tubes, pipes & hoses of unhard vulcanized rubber
10	4010	Conveyor or transmiss belts of vulcanized rubber
11	4011	New pneumatic tires, of rubber
12	4012	Retread or used pneu tires, solid tires etc, rubber
13	4013	Inner tubes for tires, of rubber
14	4014	Hygienic or pharm articles of unhard vulcan rubber
15	4015	Art of apparel & access of unhard vulcanized rubber
16	4016	Articles nesoi of unharded vulcanized rubber
17	4017	Hard rubber in all forms: articles of hard rubber

Source : Plantation Directorate General, Agriculture Ministry

LIST OF EXPORTERS FOR NATURAL RUBBER, BALATA, CHICLE ETC, PRIM FORM ETC (HS 4001)

No	Countries	Exported value (US Dollar thousand)				
		2008	2009	2010	2011	2012
	All Countries	19,897,878	11,889,591	24,766,627	45,976	35,904,142
1	Nigeria	420,902	170,373	555,298	7,446	10,068
2	Thailand	6,721	4,308,003	7,896,026	13,176,350	8,745,795
3	Indonesia	6,058,244	3,243,980	7,329,060	11,766,242	7,864,528
4	Malaysia	2,431,235	1,267,076	2,863,578	4,339,680	2,545,628
5	Viet Nam	156,271	110,868	208,986	298,922	195,751
6	Côte d'Ivoire	498,137	344,758	680,427	1,136,397	956,342
7	Germany	93,353	117,172	309,260	649,982	398,861
8	Singapore	374,216	179,102	396,358	510,728	315,207
9	Guatemala	200,479	136,237	236,750	396,514	294,191
10	Guinea	22,803	16,077	18,451	21,388	28,938

Source : ITC Calculation based on UN COMTRADE statistics.

Indonesian rubber export is still dominated by raw rubber in the form of Natural rubber, balata, chicle etc, prim form etc which is grouped under HS 4001, such as latex and smoked sheet. These goods are used as raw materials for derivative rubber products. In 2013, Indonesia's export of natural rubber reached 2.7 billion tons worth US\$6.91 billion or 73.56% from Indonesia's total rubber export.

The second most export product is vehicle tires under HS 4011, New pneumatic tires, of rubber. The volume reached 426.96 million tons worth some US\$1.65 billion. There are already several tire manufacturers in Indonesia which have exported their products, such as GT Radia, Achilles, Corsa, Goodyear and Dunlop, and dominated the international markets.

Other rubber-based product group which has shown increasing export performance is HS 4010, Conveyor or transmiss belts of vulcanized rubber. Conveyor belts are widely used in various industrial machines such as textile, plastic and metal industries as well as other large and small industries. The export volume reach 7 million tons in 2013 with a value of US\$69.22 million. Export of conveyor belts has shown a positive trend of 17.76% in the past five years.

All in all, the value of Indonesian export of rubber and rubber-based products reached US\$9.39 billion in 2013 with an average annual growth of 15.12%. The total volume in 2013 was 3.37 billion tons, increasing by 9.53% when compared to export volume in 2012.

The Top-10 export destinations for Indonesian rubber and rubber-based products are the United States (23.24%), China (16.51%), Japan (14.23%), South Korea (4.26%), India (4.11%), Germany

(3.04%), Brazil (2.81%), Canada (2.19%), Turkey (2.12%) and Belgium (1.9%). Export value to the 10 countries is growing by an average of 20.73% per year in the past five years.

The Indonesian government categorizes rubber and rubber-based products as one of its main export products. Indonesia's position in the international rubber market has prompted the government to pay more attention to the sector. The Ministry of Trade's Directorate general for National Export Development (DGNED) carries out various promotion drives to increase non-oil and -gas exports including rubber and rubber-based products.

ITRC's policy with its AETS scheme has spurred the Indonesian government to give more attention on efforts to increase export of rubber-based products. Currently the world's stock of natural rubber is already excessive giving concern its price would fall. Indonesia together with Malaysia and Thailand are currently devising strategy to cooperate with producers of rubber-based products in other countries so that rubber produced by the three countries can be fully observed. The three countries also keep optimizing their industries of domestic rubber-based products so that consumption of natural rubber in the domestic market can also increase while the export will focus more on rubber-based finished products

The government, through related ministries, is currently designing an integrated area to process and export rubber and rubber-based products to create a more efficient supply chain for rubber and rubber-based products. Sufficient infrastructure will facilitate investors which want to develop their businesses in Indonesia, especially in the rubber sector.



PT. LEMBAH KARET

Sumatra Island produces more rubber when compared to other islands in Indonesia. The availability of a large number of rubber plantation in the island provides the opportunity for the locals to set up natural rubber processing businesses.

PT Lembah Karet is one of a national private company which processes natural rubber into crumb rubber. The company is located in Padang, West Sumatra. First production for crumb rubber was conducted in September 1972 with foreign buyer requesting an ISO 9002 quality standard. The company also has its own quality policy by setting up a slogan "We Prioritize Quality Products" which are implemented to all workers.

The company has also exported Standar Indonesia Rubber (SIR) 20 to China and the United States, among other to tire manufacturers Goodyear and Michelin. The first export was conducted after taking part in a trade mission held by the Indonesian Rubber Association (Gapkindo). Participating in the trade mission has allowed the company to export SIR 20 and find no restrictions. There is no special regulations for Indonesia or export destination countries, such as China and the United States, for SIR 20 products. The company has exported SIR 20 with a value of US\$267,234,705 in the past three years.

PT Lembah Karet has its own rubber plantation so its crumb rubber production is more stable due to steady supply of the raw material. The company is one of the suitable suppliers for foreign buyers looking for Indonesian crumb rubber as raw material for their industries thanks to PT Lembah Karet's export capabilities and the availability of natural rubber from its own plantation.



LIST OF EXPORTERS

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Products : Natural rubber SIR 20

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Fax : (62-751) 62612, 62598
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Products : Natural Rubber SIR 20

PT SASMITA ABADI GLOVES

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- Jl. Raya Mastrip No. 21A
Surabaya, East Java 60223 (Factory)

Phone : (62-31) 7507221, 7507223 (workshop)
(62-31) 7670095, 7670096 (factory)
Fax : (62-31) 7507470 (workshop)
(62-31) 7666481, 7665183 (factory)
E-mail : sasmita_gloves@yahoo.com
Website : <http://www.sasmita-abadi-gloves.com/>
Products : Gloves Impregnated, Coated/Covered with
Plastic/Rubber, Knitted/Crocheted, Gloves of
Leather For Other Purposes, Gloves of Rubber

PT BINTANG GASING PERSADA

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Palembang, South Sumatra (Workshop)
- Jl. Raya Tanjung Api-api Desa Gasing Km. 10,
Kec. Teluk Kelapa, Banyuasin, South Sumatra 30147
(Factory)

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(62-711) 356060 (factory)
Fax : (62-711) 352437 (workshop)
(62-711) 352437 (factory)
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Fax : (62-61) 6613309
E-mail : deletire@indosat.net.id, info@delitire.com
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Products : Inner Tubes, of Rubber of a kind Used on
Bicycles, Inner Tubes, of Rubber of a kind Used
on Motor Card, Buses or Lorries, New Pneumatic
Tyres of Rubber of a kind Used on Bicycles, New
Pneumatic Tyres of Rubber of a kind Used on
Buses or Lorries, New Pneumatic Tyres of Rubber
of a kind Used on Motorcycles

PT. GAJAH TUNGGAL TBK

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Jl. Hayam Wuruk No. 8, Jakarta 10120 (Workshop)
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Jl. Gatot Subroto Km. 7
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Website : www.gt-tires.com
Products : Agriculture Tires, Industrial Tires, Inner Tubes, of
Rubber of a kind Used on for of the road Vehicle,
Inner Tubes, of Rubber of a kind Used on Motor
Card, Buses or Lorries, New Pneumatic Tyres of
Rubber of a kind Used on Buses or Lorries, New
Pneumatic Tyres of Rubber of a kind Used on
Motorcycles, New Pneumatic Tyres of Rubber of
a kind Used on Sedan, Used Pneumatic Tyres

PT. MULTISTRADA ARAH SARANA TBK

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(62-21) 89140333 (Factory)
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E-mail : Dewi.Novanti@multistrada.co.id
Website : www.multistrada.co.id, www.achillesradial.com
Products : New Pneumatic Tyres of Rubber of a kind Used on
Motorcycles, New Pneumatic Tyres of Rubber of a
kind Used on Sedan

PT. GADJAH RUKU

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