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REPUBLIK INDONESIA
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Ditjen PEN/MJL/60/VIII/2018

Indonesia's Automotive Industry: One of the Backbones of National Economy

What's Inside

It is a fact that the number of vehicles in big cities in Indonesia keep increasing. This shows that the progress of this sector has generated a positive development. Addressing this condition, the government of Indonesia implements some strategic regulations in order to boost the improvement of related local industries, and to encourage eco-friendly industry.

editor's desk

Dear valuable readers,

Indonesia's Automotive Industry: Contributing Significantly to National Economy

Improved domestic economic growth has influenced the increase of community activities. Therefore, the community's need for transportation, both individually and publicly, continues to show significant development.

The need for transportation means then had a positive impact on the growth of the automotive industry sector in Indonesia. Data from Gabungan Industri Kendaraan Bermotor Indonesia / GAIKINDO (The Association of Indonesia Automotive Industry) shows that over the past five years, 2013-2017, the production capacity of automotive products comprising of passenger vehicles and commercial vehicles, has steadily climbed.

The positive movement of production capacity was eventually able to contribute significantly to Indonesia's National GDP. Furthermore, a number of economic experts or automotive industry observers, predict that the level of sales of automotive products in Indonesia will continue to generate a positive trend until 2020. Not only in domestic market, the sales of Indonesian automotive products in several export markets also showed a development.

Thus, since 1996, the government of Indonesia has begun to accelerate the Intensive Program for national automotive companies to use local components to get deductions or even exemption from import duties. In addition, the government also consistently applies the regulation on the use of biofuel for all types of vehicles starting on September 1, 2018.

Thank You

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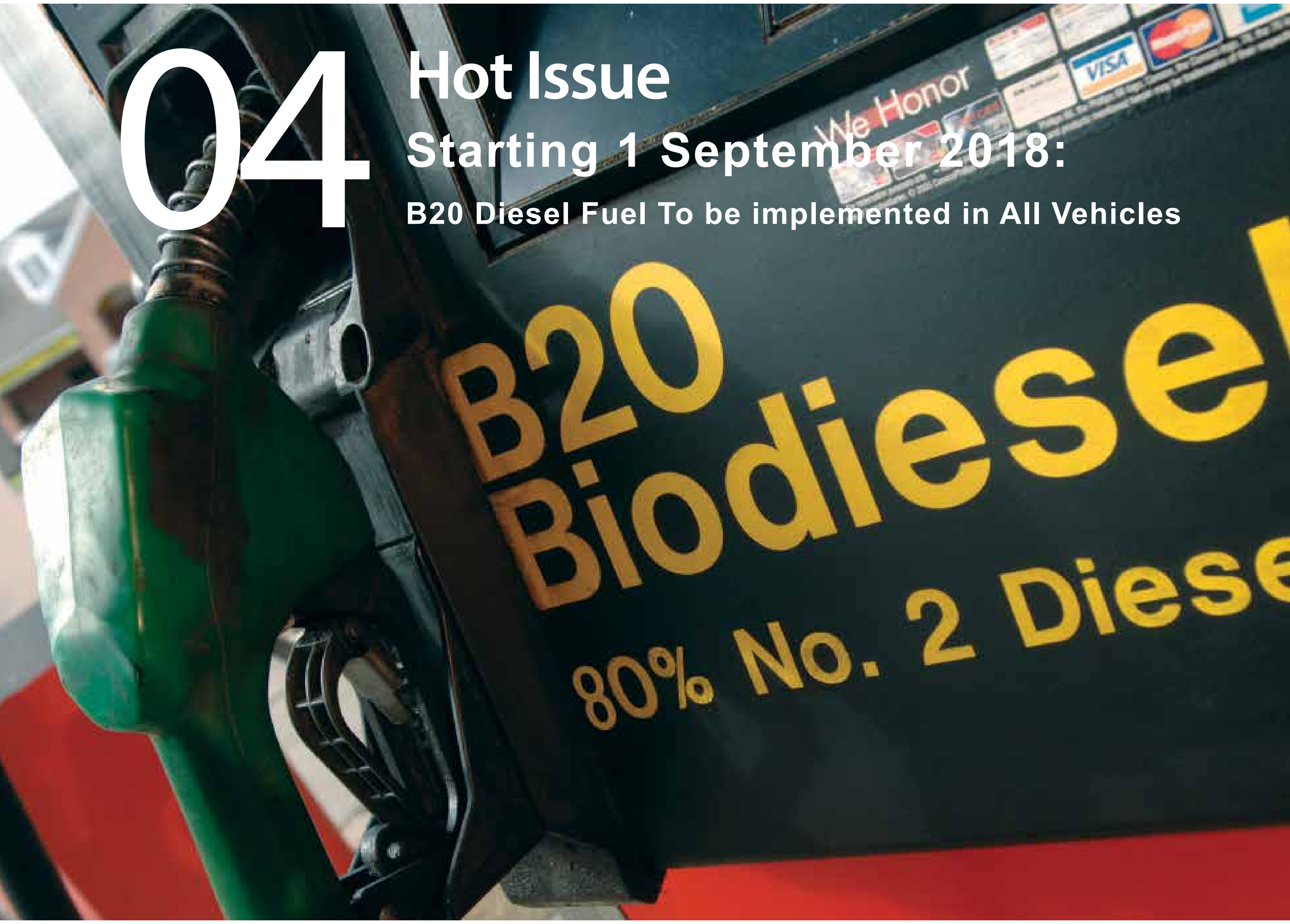
Starting 1 September 2018:
B20 Diesel Fuel To be implemented in All Vehicles



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HOT ISSUE

Starting 1 September 2018:

B20 Diesel Fuel to be implemented in All Vehicles

The B20 Program is a government regulation to mix 20% of biodiesel with 80% solar type fuel oil. Biodiesel is a biofuel for diesel engine applications in the form of Fatty Acid Methyl Esters (FAME) made from vegetable oil or animal fat through the process of esterification or transesterification. Meanwhile, biofuel is a fuel derived from vegetable ingredients and / or produced from other organic ingredients. Biofuel consists of Biodiesel, Bioethanol and Pure Vegetable Oil.

The usage of B20 is regulated through the Regulation of the Minister of Energy and Mineral Resources No. 12 of 2015 concerning the Third Amendment to the Regulation of the Minister of Energy and Mineral Resources No. 32 of 2008 concerning the Provision, Utilization and Commerce of Biofuels as Other Fuels.

This regulation has been implemented since January 2016. In accordance with the direction of the President of the Republic of Indonesia, starting September 1, 2018 the mandate of B20 is carried out massively in all sectors. The types of sectors that are obliged to implement this rule including micro businesses, fisheries business, agricultural business, transportation and public services / PSO (Public Service Obligation); non PSO transportation; also other industrial and commercial sectors.

The use of biodiesel can improve environmental quality because it is degradable and the emission generated is lower than emissions from fossil fuels. Based on the results of the Study Report of Utilization Test on B20 in 2014, the emission test results showed that B20-fueled vehicles produce lower CO emissions than B0 vehicles due to higher number of cetane and the oxygen content in B20, which encourage more perfect combustion. The perfect combustion also bring about lower Total Hydrocarbon (THC) emissions.

Analyzing the result of the study, it can be said the utilization of B20 is able to enhance national energy security through energy diversification by prioritizing local energy potential. In addition, this regulation can also save foreign exchange and reduce dependence on imports. Other benefits taken by this implementation are to increase economic added value through down streaming of the palm oil industry; open more employment, and reduce greenhouse gas emissions.

Besides Indonesia, Costa Rica has also implemented the usage of B20 since 2016, by using *jathropha* plant as the raw material. The State of Minnesota in USA also use B20 by mixing the fuel with soybean oil. Currently, Indonesia biodiesel raw materials are derived from crude palm oil (CPO). Apart from CPO, other potential plants for biodiesel raw materials include castor crops, candlenut, and others.

In order to support the successful implementation of B20, a research about B20 utilization on motor vehicles and large machine tools was carried out in 2014, by taking a distance up to 100,000 km. The test result proofed that there were no problems or significant changes in spare parts, durability and vehicle performance due to B20 usage.

The test of the fuel system with the rig test method, material compatibility, storage stability and test on large machine tools, the results obtained that the implementation of B20 is feasible to be implemented without requiring significant engine system modification.

In February 2018, the test of B20 utilization in Railways was undertaken by 2 units of CC205 locomotive (EMD) and 2 units of CC206 (GE) locomotive which doing returning route of Tanjung Enim - Tiga Gajah – Tarahan. During six months of testing, the two locomotive units were able to operate properly.

Biodiesel is also ready to be used by ordinary diesel engines with little or no adjustment. The adjustments only needed if storage or biodiesel containers are made of sensitive materials with biodiesel such as seals, gaskets, and adhesives, especially old cars and those made of natural rubber and nitrile rubber.

Thus, it is not true that biodiesel causes crust on the fuel tank. Biodiesel is an ester compound that is widely used as a solvent / cleanser. The use of biodiesel can actually clean the crust and dirt left on the engine, fuel lines and fuel tank because of its nature as a solvent / solvent.

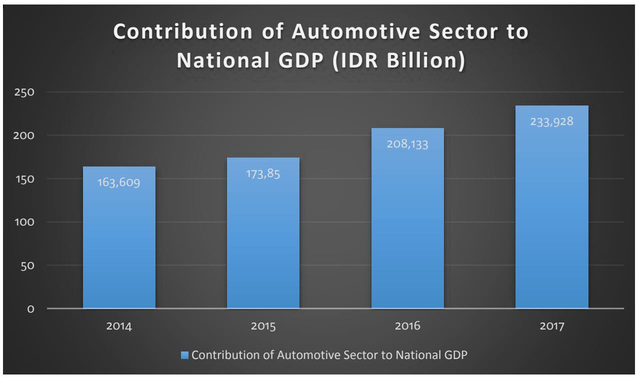
The success of using B20 depends on 3 (three) factors, namely the quality of fuel (biodiesel and diesel), handling of fuel, and also material compatibility with the fuel. Damage that occurs in the injector can result from a mismatch of one or more of the three factors.

MARKET REVIEW

Indonesia's Automotive Industry: Strengthening National Economy

Automotive industry is one of backbone sector towards Indonesian economy. Until last quarter of 2014, data from Indonesian Statistic Agency exhibits that its contribution to national Gross Domestic Product (GDP) recorded as nearly IDR 163.61 billion. Subsequently, in 2017, the contribution increased IDR 233.93 billion. While in the second quarter of 2018, the contribution to GDP has achieved IDR 61.66 billion.

The Indonesian automotive industry has transformed to be a major contributor to the country's economy. Indeed, according to our regression analysis, the Indonesian car sales exhibit a strong correlation (0.87) and a compelling coefficient of determination (0.76) to the country's gross domestic product (GDP) growth, indicating a symmetrical relationship

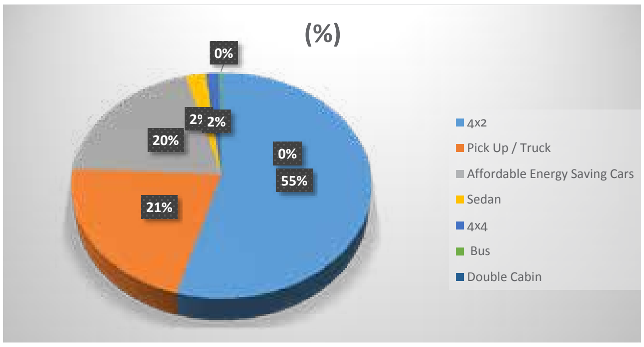


The significant number of the contribution mostly supported by the great number of annual production capacity of vehicles, which meet the international standards. The data from the Association of Indonesia Automotive Industry (Gabungan Industri Kendaraan Bermotor Indonesia/GAIKINDO), the automotive sector's production capacity also continues to climb, starting from 1,298,523 units in 2014, to become 1,216,615 units in 2017. Then, during January to July 2018, the number of vehicles that have been produced were 762,506 items. The production capacity data of the first semester of 2018 shows an increase in comparison to last year (January to July 2017), which only achieved at the level of 693,311 number of vehicles.

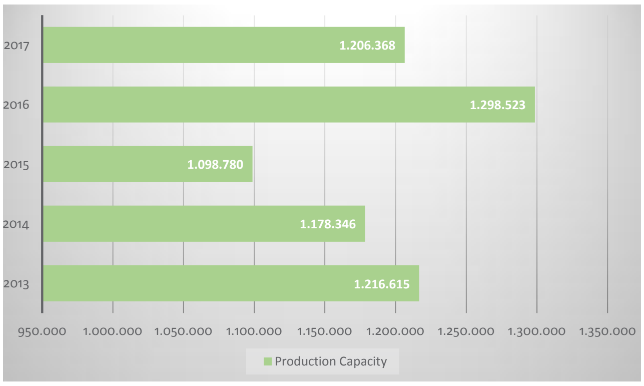
According to GAIKINDO, the automotive products are classified into eight categories, consisting of Sedan Type; 4x2 Type; 4x4 Type; Bus; Pick Up; Truck; Double Cabin (4x2 or 4x4); and Affordable Energy Saving Cars (4x2). The highest number of production capacity during first semester this year (January-July 2018) was reached by 4x2 Type (415.320 units), followed by Pick Up / Truck (163.022 units), Affordable Energy Saving Cars (152.523 units), Sedan (17.255 units), 4x4 Type (12.272 units), and Bus (2.114 units). Meanwhile, there was no producers of Double Cabin type.

Those types are further divided into two classification, Passenger Cars and Commercial Vehicles. Sedan Type; 4x2 Type; 4x4 Type and Affordable Energy Saving Cars are produced to support passengers' activities. On the other side, Bus; Pick Up; Truck; and Double Cabin are produced for commercial purposes.

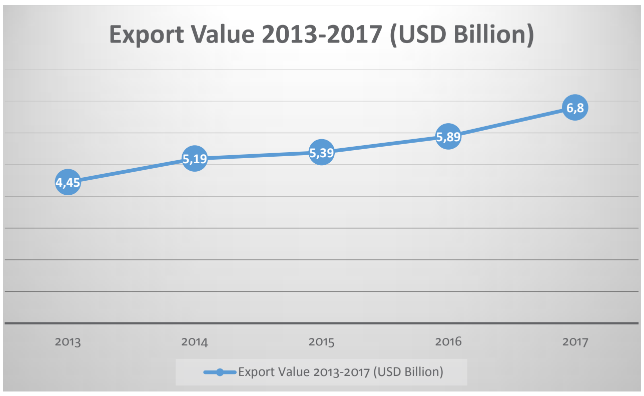
Percentage of Production Capacity
Automotive Industry in Indonesia
January-July 2018



Production Capacity
Automotive Industry in Indonesia
2013-2017



Besides GDP, another indicator that shows the development of the national automotive sector is its export performance, which increased over the past five years. In 2013, exports of Indonesian automotive products gained transaction of USD 4.45 billion, then continued to increase to USD 5.19 billion (2014), USD 5.39 billion (2015), USD 5.89 billion (2016) and finally reached USD 6.80 billion (2017).

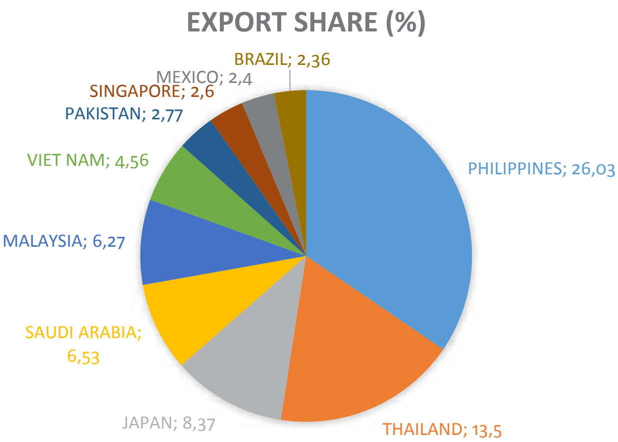


In a subsequence, the export performance of automotive industry in Indonesia has gained USD 3.41 billion, during first semester this year (January-June 2018). This transaction is higher than the export value recorded in the same period last year (January-June 2017), which was only USD 3.21 billion. Thus, there is an increase of 6.44 per cent.

The automotive products from Indonesia that have greatest demand from international markets are: 1) Passenger Motor Vehicles With Spark-Ignition Internal Combustion Reciprocating Piston Engine, Cylinder Capacity Over 1,000 Cc But Not Over 1,500 Cc / HS 870322; 2) Motorcycles And Cycles With An Auxiliary Motor, With Reciprocating Internal Combustion Piston Engine, Cylinder Capacity Over 50 Cc But Not Over 250 Cc / HS 871120; 3) Gear Boxes For Motor Vehicles / HS 870840; 4) Passenger Motor Vehicles With Compression-Ignition Internal Combustion Piston Engine (Diesel), Cylinder Capacity Over 2,500 Cc / HS 870333; and 5) Passenger Motor Vehicles With Spark-Ignition Internal Combustion Reciprocating Piston Engine, Cylinder Capacity Over 1,500 Cc But Not Over 3,000 Cc / HS 870323.

According to the data from Statistics Indonesia (Badan Pusat Statistik), in the period of January-June 2018, Philippines was the biggest export destination for automotive products from Indonesia, with the amount of USD 888.93 million. The next positions were occupied by Thailand (USD 460.95 million), Japan (USD 285.70 million), Saudi Arabia (USD 222.96 million), and Malaysia (USD 214.10 million). Other promising markets for local automotive industry are Viet Nam, Pakistan, Singapore, Mexico and Brazil. Overall, Indonesia is the 27th exporting country in the world for this sector with total market share of 0.47 percent.

Export Markets for Indonesia's Automotive Products
January-June 2018



The promising business climate of the automotive industry in Indonesia makes this country an investment destination for business people from other countries. Based on the records from the Investment Coordinating Board (Badan Koordinasi Penanaman Modal/BKPM), the automotive sector occupied the 4th rank as the most attractive business sector by Foreign Direct Investments (FDI). The data from BKPM, which is published by GAIKINDO, shows that there were 354 investment projects during the period of January - June 2015, with a total investment value of USD 1.12 million. In the meantime, the Domestic Direct Investment recorded 48 projects with a total value of USD 93418 billion, and put this sector at 16th rank among a number of investment projects within this country.

The huge number of automotive projects in Indonesia has created myriad job opportunities for national workers. The Mirae Asset Sekuritas Indonesia Research, through its Industry Report 2017, conveyed that more three million workers in Indonesia, or around 2.3 percent of domestic human resources work in this sector.

Thus, since 1996, the Indonesia government has decided to accelerate Intensive Program and implemented National Car Program. This program regulate the usage of local component at minimum 20 percent for automotive producers in the first year of production. Subsequently, there should be minimum of 40 percent and 60 percent in the second and third year of production. The Indonesia government provides deductions or even exemption from import duties.

Luxury goods tax exemption for cars with minimum 60 percent of local component is expected to encourage the automotive business players to do further investment such as building new factory, like machine and casting manufacture, that produces semi-finished products.

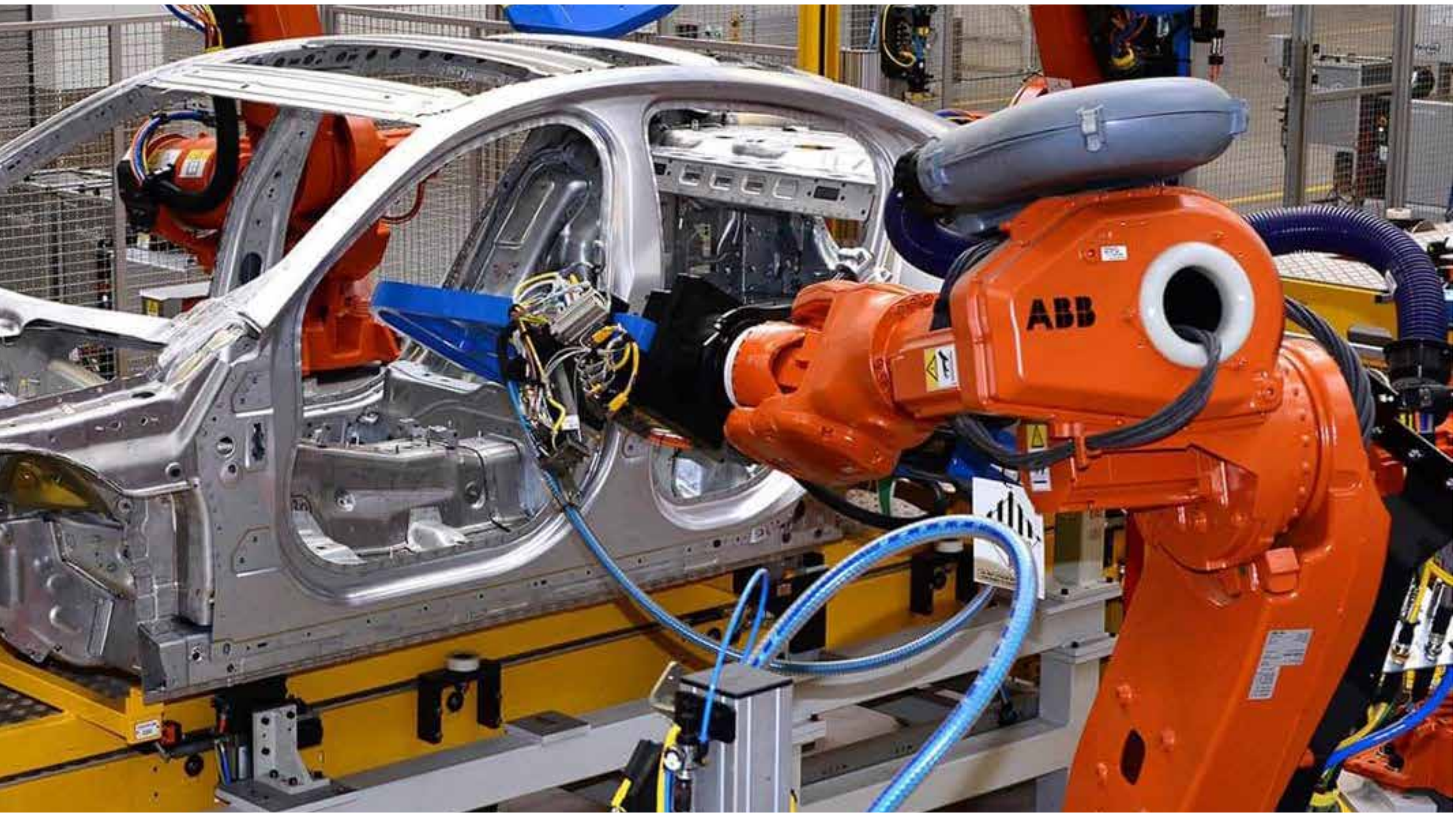
Investment Realization in January - June 2015 : *Based On Sector*

Domestic Direct Investment

NO	SECTOR	INVESTMENT (Rp Billion)	PROJECT
1	Food Industry	14,139.79	432
2	Electricity, Gas, and Water Supply	11,616.31	102
3	Chemical and Pharmaceutical Industry	11,038.87	147
4	Construction	8,325.02	101
5	Non Metallic Mineral Industry	6,650.47	91
6	Transportation, Warehouse, and Telecomunication	6,642.66	103
7	Food Crops and Plantation	5,685.22	183
8	Real Estates, Industrial Estates and Office Building	4,722.89	186
9	Metal, Machinery and Electronic Industry	4,520.49	159
10	Textile Industry	2,143.80	96
11	Rubber and Plastic Industry	1,912.17	128
12	Hotel dan Restaurant	1,902.03	189
13	Paper and Printing Industry	1,590.91	59
14	Mining	1,180.75	59
15	Trade and Reparation	988.26	438
16	Transport Equipment and Other Transport Industry	934.18	48
17	Others Services	572.70	101
18	Livestock	290.96	49
19	Fishery	271.71	8
20	Forestry	245.92	11
21	Wood Industry	56.13	30
22	Others Industry	22.65	20
23	Leather Goods and Footwear Industry	5.40	7
24	Medical Instrument, Precision, Optic and Watch Industry	0.00	3
	TOTAL	85,459.29	2,750

Foreign Direct Investment

NO	SECTOR	INVESTMENT (US$ Million)	PROJECT
1	Transportation, Warehouse, and Telecomunication	2,442.70	225
2	Mining	2,199.58	441
3	Metal, Machinery and Electronic Industry	1,402.96	870
4	Transport Equipment and Other Transport Industry	1,118.93	354
5	Chemical and Pharmaceutical Industry	899.23	378
6	Food Crops and Plantation	862.99	259
7	Construction	829.54	167
8	Food Industry	740.46	579
9	Real Estates, Industrial Estates and Office Building	661.17	326
10	Non Metallic Mineral Industry	587.00	115
11	Electricity, Gas, and Water Supply	570.88	147
12	Rubber and Plastic Industry	321.86	262
13	Hotel dan Restaurant	317.68	472
14	Trade and Reparation	245.05	1.537
15	Paper and Printing Industry	238.90	88
16	Others Services	156.57	702
17	Textile Industry	139.00	289
18	Leather Goods and Footwear Industry	67.30	93
19	Fishery	49.98	43
20	Others Industry	36.18	149
21	Wood Industry	31.32	46
22	Forestry	10.27	38
23	Livestock	6.33	23
24	Medical Instrument, Precision, Optic and Watch Industry	0,23	4
	TOTAL	13.936,09	7.607



1. **ANUGERAH MEGA MAKMUR ABADI**
Jl. Krekot Jaya Molek Bl AB/11, Jakarta - 10772

Products:
Trucks; Tractors; Lifting, Handling, Loading or Unloading Machinery (Lifts, Skip Hoist, Elevator, Escalator, etc).

2. **DAYANG MOTOR INDONESIA**
Jl. Kolonel Sutarto No. 100, Solo - 57216

Products:
Motorcycles (Incl. Mopeds); Parts & Access of Vehicle for Assembly Purpose.

3. **GAJAH TUNGGAL TBK**
Wisma Hayam Wuruk Lantai 10, Jl. Hayam Wuruk No. 8, Central Jakarta 10120

Products:
New Pneumatic Tyres of Rubber of a kind Used on Buses or Lorries; New Pneumatic Tires of Rubber of a kind Used on Motorcycles.; New Pneumatic Tires of Rubber of a kind Used on Sedan; Used Pneumatic Tyres.

4. **HINO MOTORS MANUFACTURING INDONESIA**
Wisma Indomobil 9th Floor, Jl. MT. Haryono Kav. 9, Jakarta - 13330

Products:
Side Rail; Bracket Spring; Trucks.

5. **ICHIKOH INDONESIA**
Kawasan Industri MM2100 Blok LL-1, Kec. West Cikarang, Bekasi - 17520

Products:
Polymethyl Methacrylate; Automotive Lamp.

6. **INDOBATT INDUSTRI PERMAI**
Jl. Raya Surabaya Mojokerto Km. 33 Bypass Krian, Ds. Jeruk Legi - Bolongbendo, Sidoarjo – 61263

Products:
Motorcycles; Primary Cells & Primary Batteries; Parts; Automotive Batteries; Batteries Assembly.

7. **KEDAWUNG SURYA INDUSTRIAL LTD**
Jl. Raya Rungkut No. 15-17 (PO BOX 1340 SBY), Surabaya - 60189

Products:
Laminated Safety Glass of Size & Shape Suitable for Vehicles.

8. **NEW SENTOSA INTERNATIONAL**
Ruko Cempaka Mas Blok B No. 10, Jl. Letjen Suprapto, Central Jakarta 10640

Products:
Fire Fighting Truck; Electric Motors & Generators, Excl. Generating Sets (AC/DC Motors & Generators).

9. **TOYOTA MOTOR MANUFACTURING INDONESIA**
Jl. Laksamana Yos Sudarso, Sunter II, North Jakarta Utara - 14330

Products:
Motor Vehicles Transport of Persons; Motor Vehicles Transport of Goods.

10. **TRIMITRA BATERAI PRAKASA**
Jl. Semper Timur No. 3, North Jakarta 14130

Products:
Electric Accumulators (Lead-acid, Nickel-cadmium, Nickel-iron, Lithium Ion, etc); Parts; Primary Cells & Primary Batteries; Parts; Automotive Batteries.

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