

Indonesia's Leather Industry: One of the National Outstanding Sector

WHAT'S INSIDE

A number of cities in Indonesia have been acknowledged by local and global buyers as the centres of leather products. Those cities are regularly visited by buyers and tourist who look for good-quality leather products with affordable. On the other side, this industry still deal with some obstacles. Thus, the Indonesia government implements some concrete actions to overcome them and underpin the growth of this sector



editor's desk

Welcoming the End of 2018:

National Leather Industry Records High Export Transaction

Hello December!

The year of 2018 is about to end. Government, associations, companies, and other stakeholders involved in Indonesian economic development are busy in calculating their achievement, and comparing to the targets set in the beginning of the year. One of the national industries which marks good results is leather products sector.

Although keep dealing with some barriers, the national leather industry is still continue to grow. The Indonesia government shows its consistency and commitment to underpin the development in this industry. Limitation to the exports of raw and semi-finished leather materials is basically aimed to enhance the local leather industry, by encouraging the exporters to only dispatch leather products with added value and high level of competitiveness.

Buyers abroad have known about the quality and good design of leather products from Indonesia, which results to the increasing demand of local production. In response to this, the government plays the role to assure the availability of local raw leather materials. Hence, the local exporters can use local materials with affordable price rather than imported ones. Eventually, the local exporters are able to set more competitive price for buyers.

The enhancement of national leather industry will continue until the year of 2035, as set in the National Industrial Development Master Plan (*Rencana Induk Pembangunan Industri Nasional* or RIPIN) 2015- 2035. In order to generate sustainable development, the government has determined the stages that are targeted be reached year by year. However, the success of the master plan will be only achieved by establishing cooperation with other stakeholders, more importantly the exporters of leather and leather products producers.

Thank You



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Promotion Center (ITPC)



HOT ISSUE

Limitation to Unfinished Leather Commodities: Government Commits to Drive Exports of Competitive Leather Products

Exportation of raw leather commodities has become a hot issue, that continues to roll out until now. A number of entrepreneurs disagree if the government regulates how much volume of raw leather commodities that are allowed to be dispatched to foreign countries. In fact, the regulation aims to enhance added value and competitiveness of Indonesian leather products abroad. The high-end leather products will be priced higher than the raw or semi-finished ones.

The raw or semi-finished products in the form of sheets, usually sold at low prices. This is because these types of commodities have not provided any functions that can be utilized by consumers. Meanwhile, leather products that have been processed into finished products such as bags, shoes or jackets, will have higher value and competitiveness in the market, because the functions of these products can be directly used by consumers.

Therefore, the government is consistent in trying to limit the export of raw or sheet leather so the finished products from Indonesia can compete in the global market. In a subsequence, the performance of national non-oil exports will continue to grow, as a result of the innovative and creatively-designed leather products.

In a long-term vision, the limitation of raw quilt exports or sheets also aims to underpin the sustainability of the domestic leather industry. By ensuring the availability of stable leather raw materials, leather products entrepreneurs do not need to import sheet leather from abroad, which eventually will flood the domestic market with imported products.

One of the government's efforts to limit the export of raw material leather is by raising the customs tariff out since 2016, which then applied in the Regulation of Minister of Trade of the Republic of Indonesia, Number 60 Year 2018, about "Determination of the Export Standard Prices Towards Agricultural and Forestry Products which are Charged Out". This regulation was then strengthened by the Ministry of Finance through the Regulation of Minister of Finance Number 1373/KM.4/2018, which was renewed by the Regulation of the Minister of Finance number 1814/KM.4/2018 about "Determination of Export Prices to Calculate the Charge Out".

Description		Code	Export Tariffs
A. Raw Hides and Skins from animals			
	a. Cow and buffalo	ex 4101.20.00 ex 4101.50.00 ex 4101.90.10 ex 4101.90.90	US \$ 5.2 / Kg
	b. Sheep	ex 4102.10.00 ex 4102.21.00 ex 4102.29.00	US \$ 10 / sheet
	c. Goats	ex 4103.90.00	US \$ 8.0 / Sheet
B. Hides and Skins Pickled from animals			
	a. Cow and buffalo	ex 4101.20.00 ex 4101.50.00 ex 4101.90.10 ex 4101.90.90	US \$ 4.0 / Square feet
	b. Sheep	ex 4102.10.00 ex 4102.21.00 ex 4102.29.00	US \$ 2.4 / Square feet
	c. Goats	ex 4103.90.00	US \$ 2.2 / Square feet
C. Wet Blue skin from animals			
	a. Cow and buffalo	ex 4104.11.10 ex 4104.11.90 ex 4104.19.00	US \$ 5.2 / Square feet
	b. Sheep	ex 4105.10.00	US \$ 4.0 / Square feet
	c. Goats	ex 4106.21.00	US \$ 3.0 / Square feet

Attachment of the Price Charge
Through the regulation of the Minister of Finance number 1814/KM.4/2018

In practice, the government keeps renew and update the regulation about export price charge towards raw leather material, due to dynamic condition of leather industry both in domestic and global markets. At the same time, the Indonesia government also provides incentives for exporters who dispatch finished leather products only to the world. This is also one of the government's efforts to reduce the export of raw or semi-finished leather commodities. The government's commitment to boost national leather industry by limiting raw and semi-finished leather commodities is comprehensively stated in the National Industrial Development Master Plan (*Rencana Induk Pembangunan Industri Nasional* or RIPIN) 2015- 2035, and is stipulated by Government Regulation No. 14 of 2015.





MARKET REVIEW

Leather Industry: One of the Giant Sectors in Indonesia

Leather industry in Indonesia is one of the biggest sectors which support Indonesian economy. Based on the data released by Statistics Indonesia (Badan Pusat Statistik or BPS) on August 2018, its contribution to Indonesia's national Gross Domestic Products (GDP) relatively stable around 27-28 per cent from 2014 until 2017. Meanwhile, until the 3rd quarter of 2018, the contribution of national leather industry was recorded in the percentage of 26.

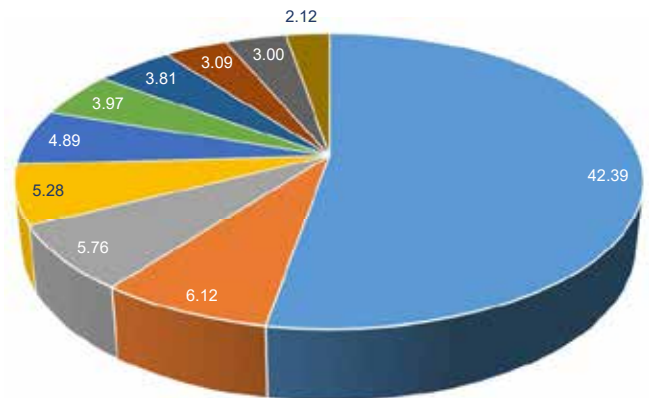
That percentage in 2018 was the highest in comparison to other 22 sectors such as rubber sector which calculated to contribute of 17,28, and achieved the second rank of industrial contribution to GDP. Subsequently, the third level was positioned by beverage industry with contribution of 15,41 per cent to GDP.

On the other side, the number of employment in the sector of leather, leather products and footwear in Indonesia increased from 32.994 in 2016 to became 33.574 in 2017. While until the end of 2018, it is predicted that the number of employment in this sector will end up at the number of 34.175 persons. Some experts say that the number of workers will continuously rise to 34.734 persons in 2019. This positive trend of employment shows that the sector of leather industry is still developing for the upcoming years.

In addition its successful in domestic market, the leather industry also gain huge shares in international markets. According to the data by BPS which processed further by the Data and Information Centre in the Ministry of Trade of the Republic of Indonesia, it can be concluded that the sector was enjoying the growth in 2017 compared to 2016. In 2017, the export value of leather products from Indonesia to global market has recorded the transaction of USD 546,01 million, which means there was an increase in comparison to 2016 with total export of USD 461,03 million.

Until September 2018, the export performance of leather products has calculated the transaction at the amount of USD 492,45 million. This transaction was 21.63 per cent higher compare to the same period in the previous year (January-September 2017) which only achieved USD 404,86 million. The main export destination for Indonesia's leather products are the United States (USD 208,75 million), the Netherlands

Indonesia's Export of Leather Products
Export Shares Jan-Sep 2018 (%)



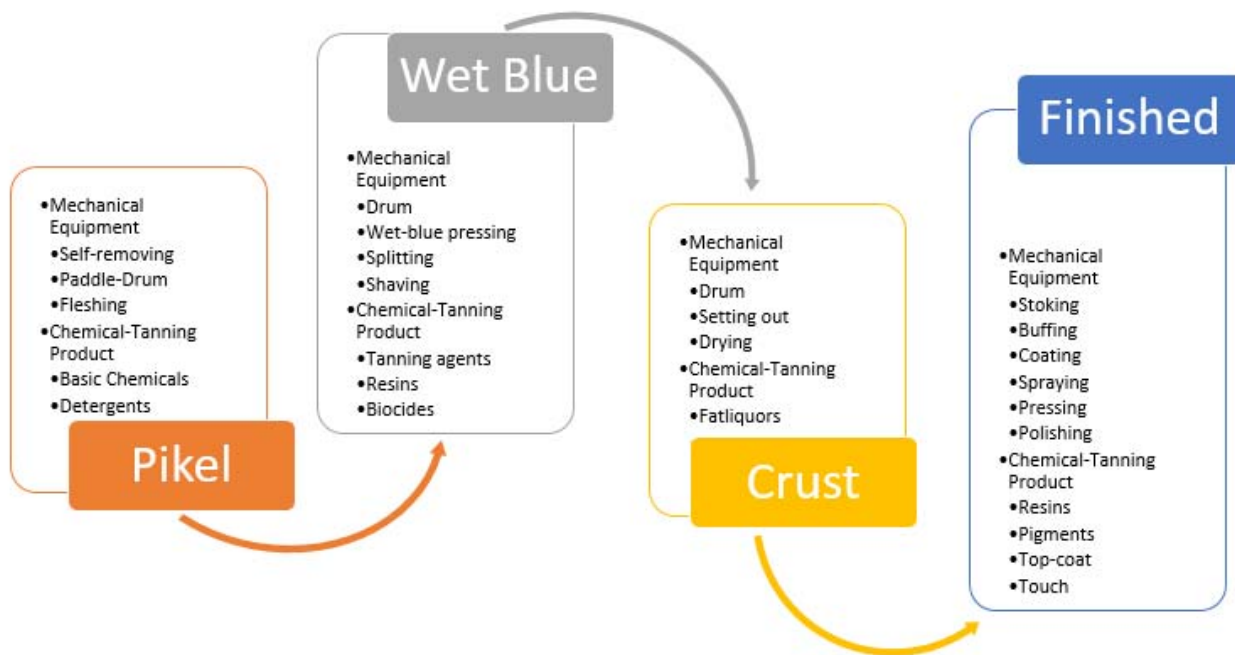
- UNITED STATES
- BELGIUM
- HONG KONG
- VIET NAM
- NETHERLANDS
- JAPAN
- SINGAPORE
- CHINA
- KOREA, REPUBLIC OF
- GERMANY

(USD 30,13 million), China (USD 28,34 million), Belgium (USD 25,99 million), Japan (USD 24,06 million), Republic of Korea (USD 19,53 million), Hong Kong (USD 18,74 million), Singapore (USD 15,22 million), Germany (USD 14,79 million) and Viet Nam (USD 10,42 million).

The greatest demand of national leather products are container bags, boxes, cases; handbags with or without shoulder strap or handles; gloves, mittens and mitts designed for sport activities use; and also trunks, suitcases, vanity cases and similar containers, with outer surface of plastics or textile materials.

Cow and buffalo hide are among the top material options. Other leather types available are sheep and goat. Leather goods suppliers in Indonesia consider local availability of raw materials as the sector's major strength.





Source: Indonesian Tanner Association official web

Another advantage that enhance this sector is the high demand of bags and footwear. The local leather segment are highly dependent on market trends and tourism. For some famous tourist destinations such as Bali and Yogyakarta, this can be an advantage to build their local brands and get recognition from overseas visitors.



CENTERS OF LEATHER INDUSTRY IN INDONESIA

Suppliers are based in Jakarta, West Java, Central Java and Yogyakarta. However, there are four cities with best reputation as the centers of leather products in Indonesia. Those are Garut, Yogyakarta, Sidoarjo and Magetan. These cities are regularly visited by local and foreign tourist to look for good leather products with affordable price. Small operations are usually around 500sqm or smaller and have less than 10 employees. The design team is often composed of up to two workers who create 20 to 30 models monthly. Meanwhile, the team of Quality Control (QC) is usually positioned by five persons, who do the duties of checking, sizing, assuring leather quality, cutting integrity, and coloring.

With factories ranging reaching 2,000sqm, midsize producers normally have up to 20 workers. Monthly output of these companies usually does not exceed 100 pieces, and they generate less than \$10,000 in annual export sales. Overseas shipments can reach up to 500 pieces and yearly foreign revenue can hit \$50,000. Larger companies, with a workforce of more than 20 and plants exceeding 2,000sqm, can manufacture more than 500 pieces monthly. Annual export sales exceed \$50,000.

Leather Industry in Garut

Garut is arguably the most famous producer of leather products in Indonesia. Many jackets, shoes, and leather bags are produced from Garut. Sukaregang area is a popular area of leather crafts in Garut, that has begun since 1970-ies. With top-notch quality and competitive prices, leather products from Sukaregang are the most favorite. The majority of leather craftsmen in this area use genuine leather, such as sheep, cow, and buffalo skin, which use is adjusted for the product to be made. Leather products from Sukaregang have penetrated foreign

markets. Some countries where Sukaregang products are marketed include Korea, Hong Kong and Japan. This area has also supplied leather products for famous international brands.

Leather Industry in Yogyakarta

Not only Batik, Yogya is also famous for leather-based products. Mading Tourism Village is a destination that visitors usually have planned to come to buy high-quality leather products. Some production processes are done by hand or handmade, so that customers can also make a custom model for their products. Leather products at Mading are also still in the competitive price range. Located in Bantul Regency, tourists can find a variety of leather crafts such as wallets, bags, shoes and jackets. Beginning in the 1940-ies, Mading leather craft was popular in the 1970s and 1980s. Now, there are around 42 production houses and 48 leather sales showrooms in Mading.

Leather Industry in Sidoarjo

In Sidoarjo, there is a city name Tanggulangin as the center of leather crafts. About 100 local craftsmen at Tanggulangin are able to make hundreds of thousands of leather products within a period of one month. Tanggulangin leather products are not only in demand by the local community, but also by consumers in Southeast Asia, such as Malaysia and Brunei Darussalam. For buyers who require for originality, they can see that the making process of leather products at Tanggulangin still uses traditional techniques. Products offered at Tanggulangin also vary, ranging from sandals, wallets, to leather luggage.

Leather Industry in Magetan

The leather industry in Magetan may be one of the oldest in Indonesia. The emergence of leather craft in this area was started since 1830, precisely when the Diponegoro War ended. Magetan leather industry achieved its glory in the 1950-1960s. Now, there are around 115 units of Small and Medium Enterprises (UKM) that produce leather products on Jalan Sawo, Magetan. The majority of the leather industry in Magetan is located in the Leather Industry Environment (LIK) in Magetan City and Ngariboyo.



1. BAGUDA WEAR BANYUWANGI

Jl. Gambor 76, Dsn. Bangunrejo RT. 05/2 Ds. Alasmalang - Singojuruh, Banyuwangi - 68464

Products:
Gloves of Leather For Other Purposes; Leather Products.

2. BINTANG ALAM SEMESTA

Jl. Banyak No. 1, Ds. Sitimulyo - Kec. Piyungan, Bantul - 55792

Products:
Footwear of Leather; Gloves of Leather For Other Purposes; Jacket of Leather.

3. DOWA HANANDI UTAMA

Jl. Godean Km. 7, Sidomoyo, Yogyakarta - 55564

Products:
Handbags With Outer Surface of Leather.

4. ECCO TANNERY INDONESIA

Jl. Bligo 17, Candi (Po. Box 1396), Sidoarjo - 61271

Products:
Footwear of Leather; Leather Products.

5. NAPUTO BALI

Graha Liva Muding No. 2 Muding Tengah, Kerobokan, Kuta - 80114

Products:
Footwear of Leather; Handbags With Outer Surface of Leather; Leather Products.

6. PELANGI PERKASA HARAPAN

Kp. Kedep Ds. Telajung Udik, Kec. Gunung Putri, Bogor - 16962

Products:
Gloves of Leather For Other Purposes; Jacket of Leather; Leather Products.

7. SANDRA LEATHER

Jl. Wahidin Sudiro Husodo No. 118, Manding, Bantul

Products:
Footwear of Leather; Jacket of Leather; Handbags With Outer Surface of Leather; Leather Products.

8. SEMPURNA INDAH MULTINUSANTARA

Jl. Raya Dayeuhkolot No. 179 Km. 6,7, Bandung - 40330

Products:
Leather Products.

9. TEGEP BOOTS

Jl. Pelajar Pejuang 45 No.104, Bandung - 40264

Products:
Footwear of Leather; Leather Products.

10. TRIO PUTRA UTAMA

Jl. Raya Narogong Gg. Waru No. 55 RT. 12/04, Kel. Kembang Kuning, Kec. Kelapa Nunggal, Bogor - 16820

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