

National Building Material Industry

Provide best-quality of building material products to preserve
the environment

WHAT'S INSIDE

The building material industry in Indonesia is one of the sectors in the country that has continued to develop since decades before. Now, with the increasing market demand both at home and abroad, especially with the large number of infrastructure development projects, it also has a positive impact on the building material sector. Through this Export News edition, we review the developments that have been achieved and its contribution in environmental preservation.

Indonesia's Building Material Industry:

One of export potential sectors which supports the environmental preservation efforts

Dear valuable readers,

For the Directorate General of National Export Development, Ministry of Trade of the Republic of Indonesia, October is the most special month of the year. Not only for DGNED leaders and staff, this month is also a special month for national business actors.

October is the time to showcase the largest international trade exhibition in Indonesia, the Trade Expo Indonesia (TEI). This year, the exhibition which is always visited by thousands of foreign buyers has entered its 34th event. Under the theme "Moving Forward to Serve the World", Indonesia is ready to fulfil world market demand with international-standard products.

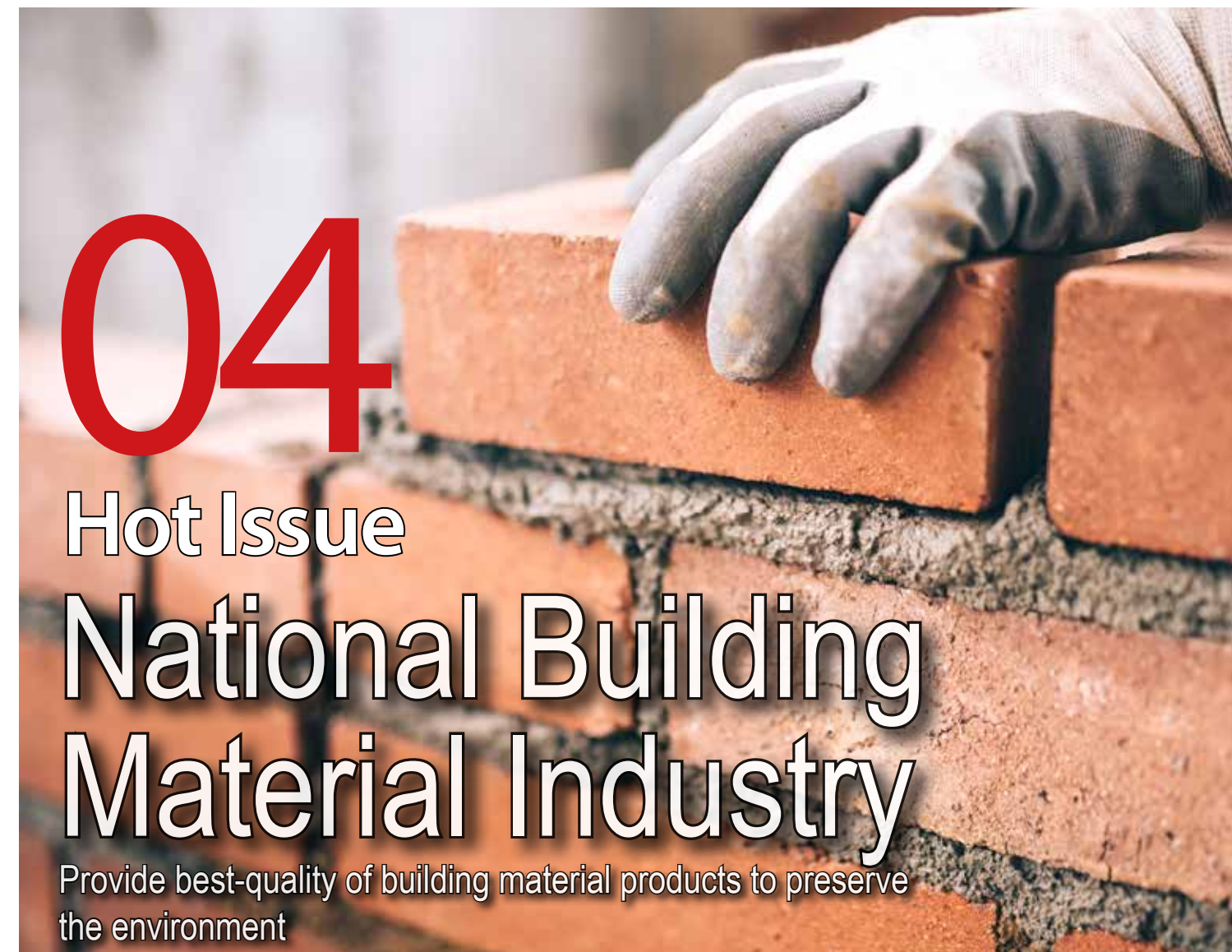
One of the products that has huge export potential in the international market is building materials. Various products for building needs are available in Indonesia, both for housing, high rise buildings, and also for the construction of public infrastructure such as highways, bridges, parks, and so forth.



On the other side, building material products from Indonesia also participate in preserving the environment, through the provision of a variety of environmentally friendly products. Among these products are wall paints, as well as lightweight bricks which have been certified by DIN standards in Germany.

Finally, we invite readers to visit the 34th TEI exhibition which will be held on October 16-20, 2019, at the Indonesia Convention Exhibition (ICE) BSD, Serpong - Tangerang, also enjoy a variety of culinary delights from various regions in Indonesia in the Nusa Food arena.

Thank You



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HOT ISSUE



Responding to this challenge, producers in various countries continue to innovate to create products that are safe for human health and safe for the environment. One of the industrial sectors that play a role in supporting human health and environmental preservation is the building material industry.

Many building material products offer the benefits of their products in terms of user safety and environmental safety. The lifestyle that increasingly pays attention to nature conservation, also inspires many sanitary producers to produce various kinds of economical sanitary equipment, from eco living to smart concepts that can be applied in the houses and buildings. Although the house area is not large, but the activity in it can have a major impact on the environment from water waste.

One such product to support safe living lifestyle is wall paint, which not only aims to beautify the interior of a house or other types of buildings. The environmentally friendly paint products will be increasingly in demand in 2019, as people become more aware of environmental and health sustainability.

Paint manufacturers understand the needs of consumers to bring a home that is not only comfortable and beautiful, but also healthy for all family members. The wall as the widest area in the house takes an important role for these needs. Anti-bacterial paint products will also be more choices because it is safe for children who often come in direct contact with the wall.

In addition to wall paint, Indonesia's building material industry also produces lightweight brick or AAC (Autoclaved Aerated concrete), that can be used in the construction of high-rise buildings and homes. AAC is a combination of silica sand, cement, aluminum paste and other ingredients. The lightweight brick production process applies technology that refers to the DIN standard from Germany, which is developed by the "Deutsches Institut für Normung". The institute is a member of the European Committee for Standardization (CEN) and the International Standards Organization (ISO), so the products produced have a fairly good quality standard.

Lightweight brick is a building material that functions the same as red brick to make walls. From the outside, lightweight brick raw materials resemble concrete in general but lighter in weight. The surface is smooth and the shape is uniform with similar 'friends'. This kind of material has begun to be used in Indonesia since 1995. However, the higher prices and limited availability caused consumers only paid low interest to use lightweight bricks.

Lightweight concrete has better strength but lighter at the same time because there are many air cavities attached in the mixture. AAC lightweight concrete structure causes the building produced to be more resistant to shocks during an earthquake. Because of its light weight, overall the burden on building structures is lower. Because it is lightweight, transportation and transportation also become easier.

Light brick is not formed by printed one by one like a red brick or brick. Light brick is cut using a special cutting machine so that the size and shape are precise. Due to its precision, the construction of the building has also become easier and faster, so the cost is more efficient. Because of its precision, lightweight bricks do not require thick broadcasting, so it is more economical to use cement mortar as a binder.

The precision condition also makes the wall surface more presentable. The use of lightweight bricks also does not require plastering that is too thick, so it saves the cost of shopping for cement and sand and shortens the processing time. In addition, the unit size of lightweight brick is larger, that make the process of building construction is faster than using smaller red bricks.

AAC lightweight concrete is a mixture of concrete that is resistant to high temperatures, so that lightweight bricks become fireproof. The resulting building also becomes more difficult to burn if there is a fire disaster. Automatically, the burned area will be limited and not extend to the entire house or building. The utility of lightweight brick also create the buildings more soundproof, due to air cavities in lightweight brick material and also more resistant to water seepage.



WORLD MARKET DEMANDS FOR ECO-FRIENDLY BUILDING MATERIALS PRODUCTS

Awareness of the importance of preserving the environment is increasing among world consumers, including in Indonesia.

MARKET REVIEW

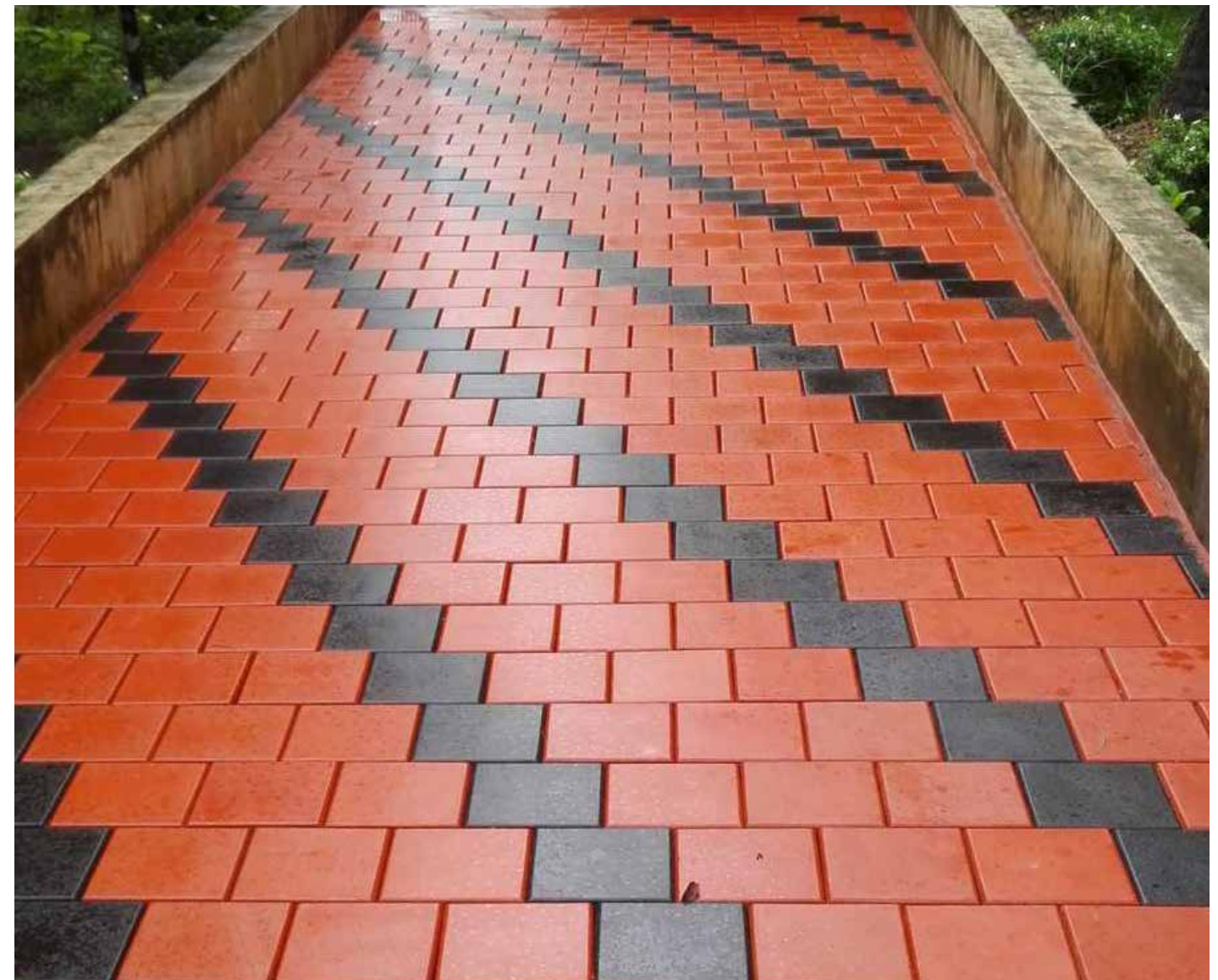
The building material industry is one of important sectors to be developed in Indonesia. Moreover, natural resources owned by Indonesia have great potential to be processed into raw materials such as cement, limestone, and ceramics. To process these natural resources, four strategies are needed, namely technological mastery, both conventional and sophisticated (techno-ware), enhancing human resource competency (human-ware), building information systems in support of management processes (info-ware), and preparing institutional and organizational systems (orga-ware). These four aspects will support creativity and innovation in this field.

The building materials industry is one of the business sectors that continues to experience growth in Indonesia, along with the increasing welfare of the Indonesian people as a whole, which in turn drives the need for homes and other types of shelter. In addition to housing, building materials products are also in high demand due to the increasing number of offices and shopping centers in Indonesia. Besides that, the development of infrastructure in Indonesia has also contributed to the increasing need for building materials products for the construction of various public facilities such as parks, bridges, highways and others.

In its implementation, Indonesian government development projects are the main driving factor in the growth of the building materials sector in Indonesia. In 2018, the growth of this sector reached 6.1 percent, or increased from USD 199.2 billion in 2017 to USD 211.3 billion in 2018. From the financial report, it was recorded that 36.4 percent came from the contribution of infrastructure projects. Meanwhile, the second largest contributor was housing projects with a market share of 25.8 percent. There was also the energy and utilities construction sector with an achievement of 22.4 percent, followed by commercial construction of 7.8%, industrial construction at the level of 6.3% and institutional construction at 3.5%.

On an ongoing basis, this sector will continue to grow each year with an average growth of around 5.75 percent. In 2023, the growth that will be recorded by this sector is projected to reach USD 279.5 trillion. Growth will occur mainly in the construction of housing, transportation and tourism infrastructure. For the transportation infrastructure in particular, the Indonesian government has allocated the 2019 budget of USD 29.1 billion or IDR 415 trillion, which means there is an increase compared to last year of 2018, which was only USD 28.8 billion or IDR 410.7 trillion.

Prospective Sector Supported by Local Indonesia's Resources



The building material industry plays an important role in the middle of an infrastructure development program as the focus of the current government. The availability of infrastructure will open isolated areas and will encourage even distribution of welfare, through the emergence of new centers of economic growth in the region.

Infrastructure development also has multiple effects that will encourage other sectors to develop, including the building materials industry. The increase in demand for building material products such as cement, concrete, iron, machinery or heavy equipment, and other materials, can make the industry move faster. This momentum can be utilized by businesses to fill the needs of the domestic property and infrastructure market. The use of technology has become a necessity for product quality.

Improved quality will certainly encourage more use of local building materials in national infrastructure projects. On the other side, products that are environmentally friendly and multi-functional, as well as high-value use are also much needed by consumers. In the end, infrastructure improvements in Indonesia can increase the competitiveness of Indonesian export products in the global market.

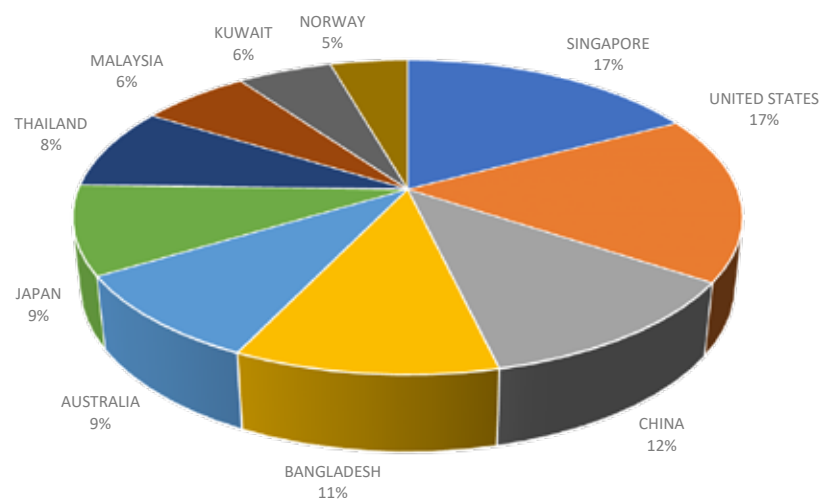
Infrastructure development in other countries can also beneficial opportunities for construction services and the Indonesian building

materials industry, to penetrate and expand the range of products in the global market, especially the nontraditional market. Throughout 2018, the export performance of building materials products from Indonesia was recorded at the level of USD 1.80 billion. This achievement was higher in comparison to the record of export transactions in the 2017 period, which generated USD 1.54 billion. Furthermore, in January-July 2019 this year, the export performance of building materials products has succeeded in generating transactions worth USD 956.19 million.

Building materials products from Indonesia that receive the highest demand from the world market are cement clinkers; towers and lattice masts of iron or steel; pipe line of a kind used for oil/gas pipelines other than stainless steel; other casing, tubing used in drilling for oil/gas of stainless steel other than drill pipe; and ceramic wares for laboratory, chemical or other technical uses of other than porcelain.

Meanwhile, the most potential export markets for local businesses in the field of building materials are Singapore (USD 101,398 million); USA (USD 100,779 million); China (USD 70,369 million); Bangladesh (USD 63,810 million); Australia (USD 53,938 million); Japan (USD 53,866 million); Thailand (USD 49,547 million); Malaysia (USD 36,885 million); Kuwait (USD 31,928 million); and Norway (USD 26,130 million).

INDONESIAN EXPORT OF BUILDING MATERIALS
January - Juli 2019



SUSTAINABLE CONSTRUCTION AND GREEN LABEL PRODUCTS

Nowadays, the issue of sustainable construction has become more and more prominent along with the increasing public awareness about the importance of preserving the environment. Sustainable construction is a term used to describe environmentally friendly construction activities. This means that the development process is directed to pay attention to the efficiency of energy resources, control of waste by recycling, and encourage the formation of urban green areas.

In fact, the construction sector is one of industrial sectors that has a major role in contributing to greenhouse gases. Many chains of industrial activity that leave a carbon footprint, from material production to the development process require a lot of energy that produces greenhouse gases.

The human life now and the future is determined by the quality of a healthy environment and sustainable development. Therefore, insistence on the existence of environmentally friendly products in development has become a demand of consumers throughout the world. Responding to this problem, the Indonesian government encourages the manufacturers of building materials to produce materials with green label certification.

The market for green certified products continues to grow and increase. The owners, users, consultants, and developers in building and construction choose and want certified products to succeed the government and the world program. For this reason, Green Label Indonesia was born with a background of desires and demands that consumers have a better environment for future generations. Green Label Indonesia is an environmentally friendly product certification, in which its life cycle can reduce the negative impact on the environment.

The benefits of Green Label Indonesia that can be used by consumers and professionals is to make it easier for consumers, to choose and determine products for buildings and interiors that are based on environmental aspects. Green Label Indonesia can also be a marketing tool and show the green performance of your product.

Without the presence of a healthy environment, it will indirectly make the sustainability of the industry hampered. An unhealthy environment will make the quality of human resources decline. The declining quality of human resources makes the industry slowdown or even die. Not only environmental issues, social and economic aspects are also considered to be sustainable.

Among the building material products in Indonesia are ceramics. During 2018, the Indonesian Ceramic Association (Asosiasi Aneka Keramik Indonesia/ASAKI) recorded a growth of around 5%. Furthermore in 2019, it is targeted that the national ceramic production capacity will grow by 7% -8%. Like last year, the ceramics industry market this year will still be dominated by the retail market and the lower middle class, which reaching 75%.

For roof coverings, there are also other availabilities from attractive materials such as concrete, metal, and polycarbonate. The model is wavy and flat (flat) with a very diverse color. Flat tile is the best roofing solution for tropical climate communities because it is stronger, heat absorbing, not easily cracked or leaking.

Meanwhile, floor coatings continue to grow, not just to cover the floor but also to build the character of space. Not surprisingly, the choices are increasingly diverse. Ranging from ceramic materials, parquet, vinyl, to natural stone can be used as an option to coat the floor of the room.

Terrazzo flooring has a number of advantages, including durable, low maintenance costs, not easy to absorb bacteria or water. Because of this, terrazzo is often used as a floor coating in areas with high traffic. This has the intention that the floor is not monotonous. In addition, the use of 3D floor coatings will also be increasingly popular as an alternative.

On the other hand, there are also precast concrete products which target the project market segment as the main focus of marketing, especially government projects. This can be anticipated based on the exposure of several ministries that revealed the growth of capital expenditure from SOEs this year. The intended capital expenditure certainly has the opportunity to fill the need for building materials for government agencies that need factory expansion.





- 1. ANDRIANIE**
Jl. Kyai Mojo No. 31, Yogyakarta - 55244

Products:
Wooden Handicraft; Cement Handicraft; Metal / Iron Handicraft.
- 2. BOSOWA CEMENT**
Menara Karya Lt. 16, Jl. HR. Rasuna Said (Kuningan) Blok X-5 Kav. 1-2, Jakarta 12950

Products:
Cement.
- 3. KERAMIKA INDONESIA ASSOSIASI Tbk**
Graha Atrium Lt. 5, Jl. Senen Raya No. 135, Jakarta 10410

Products:
Floor or Wall Tiles of Cement.
- 4. KARYA CELCON PARAMA AERATED CONCRETE**
Jl. Laks L RE Martadinata Kawasan Industri Sekupang Kav. 3, Batam - 29428

Products:
Building Blocks & Bricks of Cement.
- 5. LANCAR AJI JAYA**
Jl. Palagan Tentara Pelajar Km. 9,3 No. 66, Sariharjo – Ngaglik, Sleman - 55581

Products:
Wooden Furniture; Natural Stone; Other Ceramic Articles; Cement Handicraft.
- 6. PADANG CEMENT**
Jl. Raya Indarung, Lubuk Kilangan, Padang - 25237

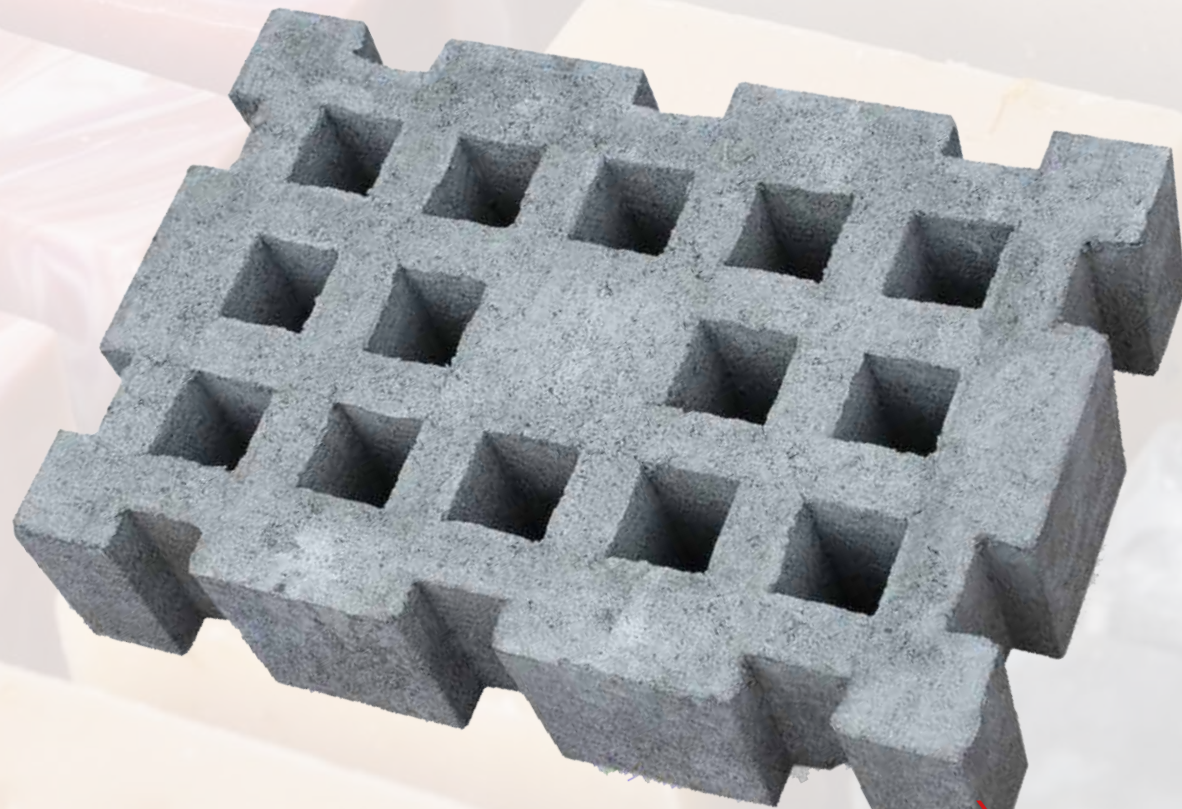
Products:
Portland Cement Type I.
- 7. PAKARTI RIKEN INDONESIA**
Jl. Kebon Sirih No. 96, Jakarta 10110

Products:
Road Wheels & Parts & Access. Thereof; Steering Wheels, Columns, Boxes; Steel Pipe; Tube and Pipe Fittings.
- 8. SUMBER KARYA UTAMA**
Jl. Pannampu No. 34-36 K, Makasar - 90154

Products:
Parquet Flooring; Sheets, Panels, Tiles & Similar Artic. Of Asbestos Cement; Building Material.
- 9. TIMBOEL KERAMIC**
Ds. Tirto Rt. 06/45 Kasongan, Bangunjiwo – Kasihan, Bantul - 55184

Products:
Statuettes & Oth. Ornamental Ceramic Articles Oth. Than Porcelain or China; Bamboo Handicraft; Wooden Handicraft; Cement Handicraft.
- 10. TONASA CEMENT**
Biringere-Pangkep, Makassar - 90651

Products:
Portland Cement Type I; Cement; White Cement, Of Portland Cement.



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