

# Indonesian Cosmetics Industry

## WHAT'S INSIDE

Indonesian beauty products have increased significantly from year to year. In the period from 2014 to 2018 the trend of exports of Indonesian beauty products grew by around 5.01% annually. Indonesia is one of the cosmetic markets that is large enough so that its business is prospective and promising.



# editor's desk

Dear valuable readers,

The Indonesian beauty industry market is the third largest market in Asia. Great opportunities await the beauty industry players to succeed in the international world. Indonesia's population, which is the fourth largest in the world, is considered a great opportunity in the world of beauty. In this modern age attractive appearance is one thing that is prioritized by everyone, especially for women who are identical with beauty and beauty. This condition is used by cosmetic manufacturers. The population of around 250 million makes Indonesia a promising market for cosmetics companies

In the last 5 years the beauty and personal care industry in Indonesia has grown by an average of 5%. Even in 2020, the beauty industry in Indonesia is predicted to experience the greatest growth compared to other countries in Southeast Asia. As a tropical country, and rich in beauty heritage, diversity of ethnic groups and cultures, it is unique for the development of potential cosmetic and beauty care industries. The cosmetics industry is one of the strategic and potential industries considering that currently there are 760 large, medium and small scale cosmetics companies spread across Indonesia, and are able to absorb 75,000 workers directly and 600,000 workers indirectly.

In this edition, the Export News bulletin reviews the news about the prospects of Indonesian beauty products that are now increasingly in demand by the world market and efforts in order to increase exports of the sector in the era of challenging globalization.

Finally, we hope that, even though the information contained in the Export News is very simple, it can be useful for readers.

Thank You



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# 04

## Hot Issue

# Indonesian Cosmetics Industry



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# HOT ISSUE

## Indonesian Cosmetics Industry National Cosmetics Industry Performance Exceeds Economic Growth



The government, in this case the Ministry of Industry, continues to spur the development of domestic domestic industries to be more competitive globally because their business prospects are still quite bright in the future. Moreover, demand in the domestic and export markets is increasing, along with the trend of people who are starting to pay attention to body care products as their main needs. Indonesia is one of the potential cosmetic product markets so that this business can be promising for producers in Indonesia who want to develop it.

According to data from the Ministry of Industry in 2017, the national cosmetics industry grew to 6.35 percent and rose to 7.36 percent in the first quarter of 2018 which means that the performance of this sector was able to grow above the national economic growth and is expected to be translucent throughout 2018 up to 7 percent, in line with startup growth and growing consumer needs.

In addition, the cosmetics industry in the country grew by 153 companies in 2017, bringing the total to now reach more than 760 companies. Of the total, as much as 95 percent of the national cosmetics industry is a small and medium industrial sector (IKM) and the rest is large-scale industry.

To boost the growth of cosmetic performance, the Government is asked to focus on making various efforts to improve the competitiveness of the cosmetics industry through various strategic programs and policies that strengthen the structure of the sector. For example, by transforming into digital technology to create high added value in the country along with the industrial era 4.0. Utilization of technology and digital intelligence starting from the production and distribution process to the consumer level, will certainly provide new opportunities in order to increase industrial competitiveness with changes in consumer tastes and changes in lifestyle,

According to Euromonitor International, developing countries, including Indonesia, have contributed 51% to the global beauty industry. In fact, according to the Ministry of Industry, Indonesia is estimated to become the main growth market in the beauty industry in 2019. Based on Government Regulation No. 14 of 2015 concerning the National Industrial Development Master Plan (RIPIN) for 2015-2035, the cosmetics industry is one of the mainstay industries, namely priority industries that play a major role as prime movers of the economy. In addition to emphasizing the mastery of research and technology to support the innovation of cosmetics products, it is also expected to create the independence of cosmetics raw materials, especially based on Indonesian nature.

Indonesia is one of the cosmetic markets that is large enough so that this business will be prospective and promising for producers who want to develop it domestically. The potential of this domestic market, among others, is increasing the number of young population or millennial generation. At present, cosmetic products have become a primary need for women who are the main target of the cosmetics industry. In addition, along with the times, the cosmetics industry has also begun to innovate in cosmetic products for men and children.

Another potential is the community's trend to use natural products (back to nature) so as to open up opportunities for the emergence of natural cosmetic products such as spa products originating from Bali. These spa products are quite attractive to foreign tourists, with good branding, it is hoped that national cosmetic products can achieve success such as cosmetic products from South Korea.





# MARKET REVIEW



## Indonesian Beauty Products Trade Performance

In the period of 2014 to 2018, Indonesian beauty products trade performance was quite positive at around 5.2% and contributed around 0.83% in the world trade of beauty products. For the growth of Indonesia's export value from 2017 to 2018 it also increased by around 4.2%. Based on data from the Food and Drug Supervisory Agency (BPOM) regarding products circulating in Indonesia in 2016 the number of cosmetics in circulation was 54.84% with a total of circulating products of 43,531 and an increase in 2017 namely the number of cosmetics in circulation was 56,39% with a total of 53,016 types of products in circulation. Indonesia's beauty products exports reached USD 1.03 billion in 2018, and in world trade, Indonesia contributed to supply beauty products by 0.83% to the world.

For countries in the ASEAN region, Indonesia only lost to Singapore and Thailand, each of which contributed exports of 5.38%, and 1.63%. Asian countries began to show up in the world cosmetics industry, such as Japan, Korea and even Indonesia. South Korea began to be touted as a new France, due to the innovation of its skin care products that are able to surpass beauty products from other countries. Not only in cosmetics as well as skin care such as serum, a series of technologies through plastic surgery, Lasers also become a trend. The development of skin care in South Korea is motivated by the complaints of consumers. Korean women complain that their skin turns dark from sun exposure. After exploring these conditions, in fact it has become a classic problem since the days of the kingdom in Asia. The secret of skin care for the princesses has finally become the answer for the cosmetics industry players to meet the needs of their consumers.

Not only herbs and natural ingredients ala the royal family, a series of innovations with technology were also launched. Mitel market research institute notes mention the growth of cosmetics and skin care Korea reached 5.8 percent year-on-year since 2013. It beat the United States which is only 3.9 percent. South Korea has a great interest in Indonesia as a market share in Asia. Besides being the most populous country in Southeast Asia, Indonesia is one of the biggest Korean Wave fanbases in the world. The Central Statistics Agency noted Korea's cosmetics and skin care imports reached 5.9 million US dollars in

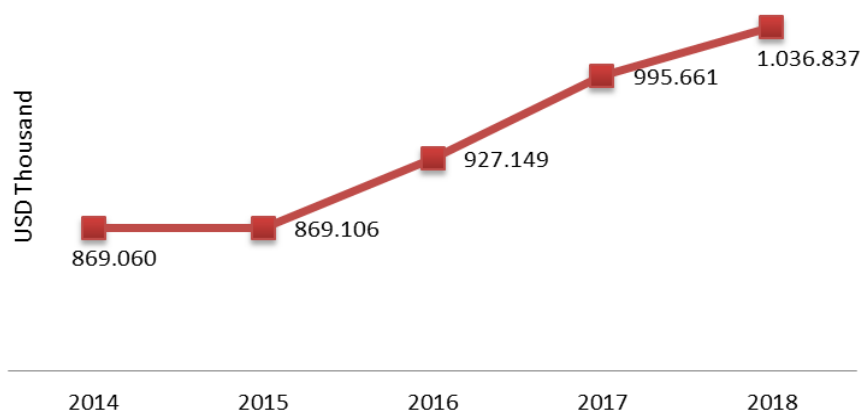
2016. The shift in skin care centers that are increasingly to Asia also raises opportunities for Indonesia to become a powerhouse for skin care and beauty products. The cosmetics industry in Indonesia itself began to develop in the 70s. Martha Tilaar Group is listed as a pioneer in the cosmetics industry in Indonesia. Precisely in 1970, D.R (H.C) Martha Tilaar started pioneering business in the beauty field. Now the development of the cosmetics industry in the country is getting bigger.

Martha Tilaar's success can be traced to the various types of beauty products that have been successfully produced extraordinary profits. Based on data from the official website of Marta Tilaar, its party revealed that at least 11% of the facial care product market in Indonesia they were able to master through their brands such as PAC, Dewi Sri Spa, Sari Ayu, Caring Colors, Belia, Biokos, Mirabella, Cempaka and Rudy Hadisuawarno Cosmetics. As an old player Martha Tilaar not only has a brilliant background in the local market but also in a neighboring country.

Indonesian beauty products have increased significantly from year to year. In the period from 2014 to 2018 the trend of exports of Indonesian beauty products grew by around 5.01% annually. Indonesia is one of the cosmetic markets that is large enough so that its business is prospective and promising. The potential of this domestic market includes an increase in the population of young people or millennial generation. At present, cosmetic products have become a primary need for women who are the main target of the cosmetics industry.

Since the application of ASEAN Harmonization in cosmetics through the online notification system in 2011, there has been an increase in the number of notifications, both domestic and foreign products. In addition there is an increase in the type of cosmetics, especially the decorative and maintenance categories, there are always new products that are notified at the Indonesian National Drug and Food Control Agency. This shows the huge potential and market opportunities for the cosmetics industry. As a regulator, the National Agency for Drug and Food Control Republic of Indonesia continues to support the growth of the cosmetics industry, especially so that Indonesian cosmetic products can meet the safety, usefulness and quality requirements.

## INDONESIAN EXPORT OF BEAUTY PRODUCTS



Source: Trademap

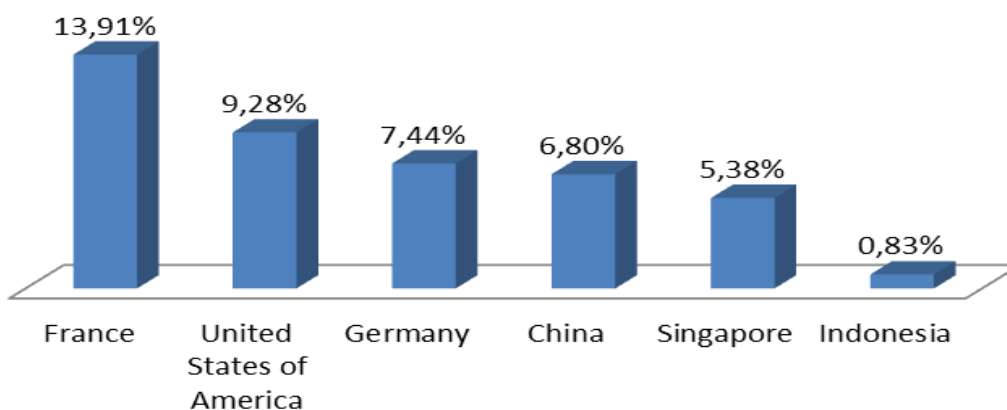


The attractiveness of the cosmetics market and industry in Indonesia is inseparable from the large population of Indonesia. Not surprisingly, by looking at the size of the market, imported cosmetics flocked to Indonesia. One of the global brands that is very serious about working on the market in Indonesia is L'Oréal. The brand first entered Indonesia in 1979. President Director of PT L'Oréal Indonesia, Vismay Sharma explained, L'Oréal's business in Indonesia continued to increase with an average sales increase of 30 percent per year. Another foreign brand that has also tasted the Indonesian market is the Body Shop. Although it does not yet have a production base in Indonesia, the American cosmetics company experienced significant growth. Head of Corporate Communications Rika Anggraini said, Body Shop began to enter the Indonesian market since 1992. With a very large Indonesian market, Body Shop was able to achieve sales very quickly.

Based on an analysis conducted by Worldpanel Indonesia, Indonesian consumer loyalty is relatively low. The opportunity to switch brands on average tends to be higher than the percentage to be loyal to one particular brand. This phenomenon is common among consumers in Indonesia. With a variety of reasons and rationale, consumers switch products. This phenomenon is known as brand switching, a natural symptom of consumer behavior. 88% of consumers in Indonesia like to experiment with various brands of products for the same category of goods. Brand switching is supported by the globalization of information networks, so catalogs or information on goods can be obtained easily from mass media and electronic advertisements and the internet.

More than two decades in control of the cosmetics industry in the world, now the position of France will soon be displaced by new players. Right in 1990 the country with the capital city of Paris officially

### COUNTRY OF BEAUTY PRODUCTS EXPORTERS 2018



Source: Trademap



became the largest powerhouse in the world. Everyone is waiting for their products and all women want to turn out to be more sexy like French women. The growing beauty industry makes countries in Europe take part in enlivening it with a variety of brands. Powerhouse skin care and beauty began to mushroom in various countries in Europe and America. Through the L'Oréal Group, the French cosmetics industry worldwide. Unfortunately, the dominance of European brands launched by multinational companies is not enough to be able to maintain the position of France.

It is hoped that the national cosmetics industry will actively synergize in Research and Development (RnD) activities with research institutions and universities. It aims to create product innovation according to current market needs. The cosmetics industry cannot be separated from the creative sector or lifestyle, and involves links between SMIs and large industries. So, the success of the cosmetics industry requires a step of strong collaboration between manufacturing and creativity. The supply chain system in the cosmetics industry must be built through mutually beneficial and needy relationships. Moreover, now it has entered the era of Industry 4.0, where digital transformation will be able to create added value in the national cosmetics industry.



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### Products:

Beauty or make-up preparations & preparations for the care of the skin.

## 2. ARJUNA YOGA SAKTI, PT

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Email : dayututik@yahoo.com, arjuna.ys@gmail.com  
Website : www.sudamala.com

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Beauty or make-up preparations & preparations for the care of the skin.

## 3. GONDOWANGI TRADISIONAL KOSMETIKA, PT

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Email : cs@gondowangi.com, klinik@gondowangi.com  
Website : www.gondowangi.com

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## 4. KURNIATAMA LESTARI, PT

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Beauty or make-up preparations & preparations for the care of the skin, Cinnamons Oil, Clove Leaf Oil, Essential Oils, Eucalyptus Oil, Face and skin creams and lotions, Ginger Oil, Green Tea, Hair Lacquers, Herbal Products, Jasmin Oil, Lavender Oil, Lime Oil, Manicure or Pedicure Preparation, Massage Oil, Orange Oil, Other Essential Oils, Patchouli Oil, Peppermint Oil, Vetiver Oil.

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Website : www.mandarasp.com

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Website : www.airmancur.co.id

### Products:

Beauty or make-up preparations & preparations for the care of the skin, Extracts, Essences & Concentrates of Oth. Tea or Mate, Medicinal Herbs, Other Mineral Water Containing Added Sugar.

## 7. PZ CUSSONS INDONESIA, PT

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### Products:

Bath And Toilet Soap, Beauty or make-up preparations & preparations for the care of the skin, Soap In Other Forms.

## 8. MUSTIKA RATU Tbk, PT

Graha Mustika Ratu, Jl. Jend. Gatot Subroto Kav. 74-75 - Pancoran - 12870, D. K. I. Jakarta

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### Products:

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## 9. BEIERSDORF INDONESIA, PT

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Website : http://www.beiersdorf.co.id

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Fax : (62-21) 34834601, 3457650

Email : meijih@rad.net.id, adm@meiji.co.id, Andik@fact.meiji.co.id  
Website : http://www.meiji.co.id/

### Products:

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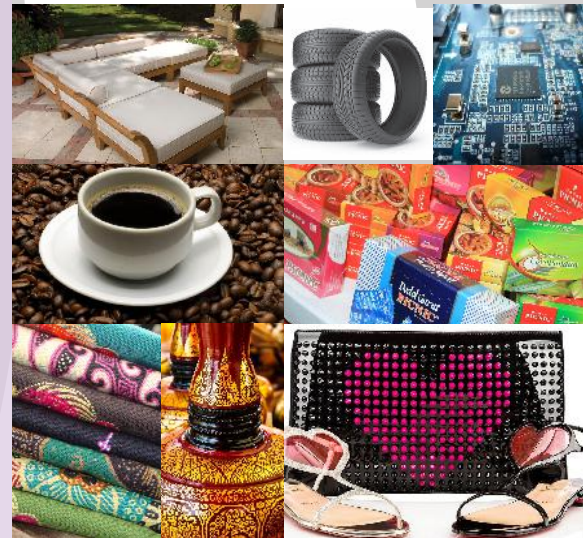
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