

INDONESIAN LEATHER PRODUCTS



WHAT'S INSIDE

Indonesia is endowed with rich natural resources, including various farm animals that can be exploited, not only meat but also the skin. Indonesia has long been known for the kind of leather products and now also known as a producer of leather products are good. While the current trend still shows a small amount of exports, a long tradition in the leather products industry will certainly encourage Indonesia to become a major exporter of leather products.

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Dear Valued Readers,

Welcome to the September 2014 edition of Export News which will reveal the potential of Indonesian leather products under the Harmonized System (HS) codes 4202, 4203, 4204, 4205, 6403, 6404 and 6405. Indeed, exports for this product category is still low when compared with other Indonesian traditional export commodities such as palm oil and its derivatives. However, with a strong tradition in leather and a growing segment of the middle class triggering an increase in the economy, it's only a matter of time before Indonesia becomes a large exporter of leather products.

Indonesian leather products have been exported to over 100 countries around the world such as the United States of America, Italy, Netherlands, Japan, Hong Kong, Singapore, Australia, Belgium, Germany and the United Arab Emirates, which made the Top 10 major export destinations in 2014.

Many global brands have made Indonesian leather products into well developed products. There are also a lot of global brands operating in Indonesia as their production centers. Those brands set up factories here, producing quality leather products, such as golf gloves. Indonesia continues to show political stability and promising economic prospects. We expect the companies will also serve export markets in addition to meeting huge domestic demands

In this edition, we present you with a review on the performance of Indonesian exports leather products such as leather boots, leather jackets and a variety of leather bags and so on, and displays the list of exporters. Finally, we hope you enjoy reading this issue as much as you love our leather products.

Thank You

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hot issue

Indonesian Leather Products

Consumers of leather products always want to get such a quality product that is sold in upscale markets from well-known brands. For those who have limited budget, it will be difficult to get the expensive products from luxury brands that many people desire to have. Producers in developing countries make similar products but using local

brands. Leather products from Indonesia have also experienced growth, both in processing of raw materials, product quality and design. Leather jackets have been able to meet the taste, especially clothing for men and women who are classy, middle-to-middle class entrepreneurs.



The celebrities have fallen in love with branded products, affecting consumers of all segments, leading some to be influential and respected brands in the fashion world. Exorbitant prices of some leather products, good jackets, shoes and others, have caused demands for leather products increased.

Developing countries also have quality leather products. Producing leather products that are able to master the global market is a challenge for local producers, whether past, present and future.

Young designers struggle to reach success, following the success that has been achieved by world renowned designers. Creative and innovative designers are able to create leather products which refer to those worn by celebrities with reduced prices, so that the middle class can enjoy them.

In the production process, the businesses have implemented product processing system. To make high quality shoes, it must go through several stages. Handmade shoe-making process is very detailed, thorough and requires perseverance. The results is shoes that can last a long time and have good quality.

Indonesian Leather Products In The World

An estimated domestic demand for cowhide is 20 million pieces per year. Throughout 2013, cow leather exports reached 1.1 million pieces, 500.000 pieces of goatskin and sheepskin 450.000 sheets. This condition affects the leather products industry in the country. It is estimated, the current domestic use of leather for leather products such as shoes, bags and so on, is only at about 35%. The need will increase, if the skin export is reduced.

Areas producing leather products in Indonesia include Bali, East Java, West Java and Sumatra. An assortment of models and qualities of products can be found in those areas.

Besides the development in domestic market, export markets have also increased in the period of 2009-2013, when exports of leather products showed increasing trend.

Local manufacturers of leather products which have been exporting their quality products include: Parker Shoes from CV Citra Baru Busana CV (Shoes & Socks Industry), GAMMARA Handcrafted genuine leather and JK Collection (Shoes).

Not only local buyers, foreign buyers also often

come to the manufacturers to buy their products. To check the quality of the products, the producer contacted the buyer, asking whether the bought products had good quality, or whether they were damaged. So far, responses from the buyers always stated that the leather products were of good the quality.



Market Review

Indonesia has been exporting various products under HS 42 (Articles of leather, animal gut, harness, travel goods). The export of Indonesian leather products was increasing from 2009 to 2013. In 2009, Indonesia's export value was US\$178,4 million, exported to 161 countries. In 2010 the export of leather products in Indonesia increased by 27,58% to US\$246,4 million, in 2011 export value again increased by 15,65% to US\$292,1. million The following year, the export value increased again to US\$324,6 million, an increase of 10,03%, and increased by 3,97% in 2013 to US\$338,1 million.

In 2013 export destinations of Indonesian leather products under HS 4202 was dominated by USA at 32,13% while Italy was second at 11,24%. At the third place was Netherlands with 7,97% and followed by Japan (6,75%), Hong Kong (6,33%), Singapore (4,44%), Australia (3,57%), Belgium (3,14%), Germany (2,59%), and United Arab Emirates (2,54%) to complete the Top 10.

Exported leather products which fall under HS 4202 are:

- Bag, with straps or handles, leather or composition leather or patent leather.

- Bags, strapless or strap handles, plastic or textile materials.
- Suitcases of leather, composition leather or patent leather.
- Bag with leather material, composition leather or patent leather.
- Equipment normally carried in the pocket or handbag, of leather, composition leather or patent leather.

Leather products are grouped under the HS codes 4202-4205 and 6403-6405. Leather products grouped under HS 4203 include:

- Leather gloves designed for sports.
- Leather gloves, not designed for sport.
- Apparel, of composition leather or Leather.
- Belts and bandoliers with or without buckles, of leather or composition Skin.
- Clothing accessories nesoi, of composition leather or skin.
- Clothing Accessories, leather or composition leather.

Leather products in HS 4202:

HS	COMMODITY
420221	Handbags, Whether Or Not With Shoulder Strap Or Handles, With Outer Surface Of Leather, Composition Leather Or Patent Leather
420222	Handbags, Whether Or Not With Shoulder Strap Or Handles, With Outer Surface Of Plastic Sheeting Or Of Textile Materials
420292	Container Bags, Boxes, Cases And Satchels Nesoi, With Outer Surface Of Plastic Sheeting Or Of Textile Materials
420229	Handbags, Whether Or Not With Shoulder Strap Or Handles, With Outer Surface Of Materials Nesoi
420212	Trunks, Suitcases, Vanity Cases And Similar Containers, With Outer Surface Of Plastics Or Of Textile Materials
420211	Trunks, Suitcases, Vanity Cases And Similar Containers, With Outer Surface Of Leather, Composition Leather Or Of Patent Leather
420299	Container Bags, Boxes, Cases And Satchels Nesoi, With Outer Surface Of Materials Nesoi
420291	Container Bags, Boxes, Cases And Satchels Nesoi, With Outer Surface Of Leather, Composition Leather Or Patent Leather
420231	Articles Normally Carried In The Pocket Or Handbag, With Outer Surface Of Leather, Composition Leather Or Patent Leather
420219	Trunks, Suitcases, Vanity Cases And Similar Containers, With Outer Surface Of Materials Other Than Leather, Plastics Or Textiles
420239	Articles Normally Carried In The Pocket Or Handbag, With Outer Surface Of Materials Nesoi
420232	Articles Normally Carried In The Pocket Or Handbag, With Outer Surface Of Plastic Sheeting Or Of Textile Materials

World Exports

Export and import figure of leather products in the world have shown strong growth in the 2009-2013 period with an average growth of 10,60% and 9,22% respectively.

The year-on-year export growth between 2009 and 2010 was 16,94% and increased to 20,89% in 2011 before dropping to 4,01% in 2012. The growth rate was even smaller in 2013 at 0,58%.

The world's exports of leather products reached a value of US\$43,28 billion in 2009 and increased by 16,94% to US\$52,11 billion in 2010. There was another increase in 2011 when the export reached US\$65,85 billion, an increase of 20,89%. In 2012, the growth was reduced at 4,01% with a value of US\$68,61 billion. The demand was still weakened in 2013 with a value of US\$69,01 billion, or a growth of a mere 0,58%.

The Top 5 exporting countries in 2013 were China with US\$30,68 for a market share of 44,5%, followed by Italy in the second place with US\$8,48 billion (12,3%). France was in the third place with US\$6,75 billion for a market share of 9,8%, followed by India with US\$2,51 billion (3,6%) and Vietnam with US\$2,26 billion (3,3%).

Imports of world's leather products also increased, with a growth of 14,50% between 2009 and 2010. The import grew by 15,92% in 2011 before weakening to 4,07% in 2012. The imports grew even slower in 2013 with 2,41%.

It seems that the prolonged global financial crisis had affected the trade of leather products to some extent.

The imports of leather products grouped under HS 42 (Articles of leather, animal gut, harness, travel goods) always increased in the period of 2009-2013. The world's demand in 2009 was US\$46,78 billion. The demand increased to US\$54,72 billion in 2010 and US\$65,07 billion in 2011. Imports were still strong in 2012 and 2013 with a value of US\$67,83 billion and US\$69,51 billion respectively.

Besides exporting leather and leather products, Indonesia also imported leather products, such as:

- Trunks, suit-cases, camera cases, handbags etc, of leather (HS 4202)
- Articles of apparel clothing access, of leather or composition leather (HS 4203)
- Articles of leather or composition leather (HS 4205)
- Articles of gut, of goldbeater's skins, of bladders or of tendons (HS 4206)
- Saddlery and harness for any animal, of any material (HS 4201)
- Articles of leather or composition leather for technical uses (HS 4204)

Meanwhile, the role of Indonesian exports of leather products is showing a positive development in the global market.

In 2013, Indonesia was in the 20th among countries exporting leather products. With an export of US\$338,08 million for products grouped under HS 42 (Articles of leather, animal gut, harness, travel goods), Indonesia had a market share of 0,5% and ranked 4th among ASEAN country members.

Viet Nam was the top exporter in ASEAN and ranked 5th in the world with an export of US\$2,26 billion for a market share of 3,3% followed by Singapore at world's No. 14 with an export of US\$631,09 million (0,9%). Thailand ranked 3rd in ASEAN and world's No. 17 with an export of US\$466,59 million.

The world's second largest economy, China, was also the world's largest exporter of leather products in 2013 with an export of US\$30,68 billion for a market share of 44,5%.

Italy was at the distant second with an export of US\$8,48 billion or a market share of 12,3% and followed by France with US\$6,75 billion or 9,8% of market share at the 3rd place.

India was 4th with US\$2,51 billion (3,6%) followed by Viet Nam with US\$2,26 billion (3,3%), Germany with US\$2,15 billion (3,1%), USA with US\$1,63 billion (2,4%), the Netherlands with US\$1,61 billion (2,3%), Belgium with US\$1,46 billion (2,1%) and Spain with US\$1,04 billion (1,5%)

Asian makers of leather products also enjoyed a positive growth despite the continuing global

Market Review

financial crisis in 2009. The export of leather products continued to grow in the period from 2009 to 2013. In 2013, China was the largest exporter with a market share of 44,5% and an export value of US\$30,68 billion, followed by India which had 3,6% of market share (US\$2,51 billion) and Viet Nam at 3,3% (US\$2,26 billion). At No. 4 was Pakistan which commanded a market share of 1,1% with an export of US\$743,53 million and South Korea was No. 5 with 1% (US\$657,60 million).

Singapore was at the 6th place among Asian exporters of leather products with a market share of 0,9% and a export value of US\$631,09 million, followed by Hong Kong with 0,8% (US\$565,86 million), Thailand at 0,7% (US\$466,59 million) and Indonesia at 0,5% (US\$338,07 million). The Philippines ranked the 10th among Asian top exporters with a market share of 0,3% (USD 223,7 million).

Chinese Taipei followed closely at the 11th place with a market share of 0,3% and an export value of US\$192,88 million, followed by Bangladesh at 0,1% (US\$89,38 million), Malaysia with 0,1% (US\$56,43 million), and Japan at 0,1% (US\$46,65 million). Sri Lanka completed the Top 15 Asian exporters with an export worth US\$32,14 million.

World Imports

World's import of leather products also showed a similar increase with world's export. The import in 2010 worth US\$54,71 billion, an increase of 14,50% when compared to import figure in 2009 of US\$46,78 billion. Imports increased by 15,92% in 2011 with a value of US\$65,07 billion.

List of ASIA exporters for the selected product

Product: 42 Articles of leather, animal gut, harness, travel goods

Unit: US Dollar thousand

No.	Exporters	Exported value in 2009	Exported value in 2010	Exported value in 2011	Exported value in 2012	Exported value in 2013	Share in value in world's exports, % in 2013
	World	43,281,414	52,107,927	65,864,019	68,612,618	69,009,868	100
1	China	15,115,638	20,845,585	26,892,327	28,243,843	30,680,407	44.5
2	India	1,417,471	1,446,996	2,023,911	2,036,379	2,513,188	3.6
3	Viet Nam	653,502	856,880	1,151,117	1,379,300	2,263,539	3.3
4	Pakistan	577,907	618,842	681,344	673,815	743,538	1.1
5	Korea, Republic of	97,584	104,113	151,242	384,757	657,607	1
6	Singapore	368,393	415,829	525,973	544,750	631,098	0.9
7	Hong Kong, China	5,463,149	6,015,987	6,895,327	6,850,044	565,867	0.8
8	Thailand	297,339	335,956	405,773	432,591	466,597	0.7
9	Indonesia	178,427	246,372	292,088	324,665	338,077	0.5
10	Philippines	117,469	102,179	84,687	140,381	223,681	0.3
11	Taipei, Chinese	130,741	149,226	180,421	202,000	192,880	0.3
12	Bangladesh	20,571	28,497	38,279	63,061	89,380	0.1
13	Malaysia	43,434	41,366	49,815	70,104	56,430	0.1
14	Japan	45,444	54,653	65,559	54,873	46,654	0.1
15	Sri Lanka	13,203	16,663	19,294	18,682	32,148	0
16	Others	18,741,142	20,828,783	26,406,862	27,193,373	29,508,777	

Sources: ITC calculations based on UN COMTRADE statistics.

Increasing demands by a number of countries, such as USA, South Korea, China and Canada and other country members of the World Trade Organization (WTO), saw the imports increased to 4,07% at US\$67,83 billion in 2012.

The year 2013 also saw an increased imports although the growth was weakened at 2,41% to US\$69,51 billion.

Imports from some countries in the same period increased positively from year to year. The United States imported the most in 2013 with a value of US\$13,42 billion for market share of 19,3% followed by Japan for US\$5,86 billion (8,4%) and Hong Kong with US\$4,90 billion (7,0%). France was ranked the 4th with US \$ 4,27 billion (6,1 %) and Germany at the 5th position with US\$4,15 billion (6,0%).

Meanwhile, in 2013 Indonesia imported leather products worth US\$221,25 million for a market share of 0,30%, standing at the 38th position. Most of Indonesian imports was supplied by China with US\$137,79 million or 62,3% of Indonesia's total imports.

The second largest supplier of Indonesian import was South Korea worth US\$20,48 million or 9,3% of total import, while France was the third largest supplier with US\$13,65 million (6,2%). The fourth largest supplier for Indonesian market in 2013 was Hong Kong with US\$12,17 million (5,5%), while Singapore was fifth with US\$8,64 million (3,9%).

Indonesian leather products imported from these countries are:

- Trunks, suit-cases, camera cases, handbags etc. of leather, plastic, textile etc. (HS 4202),
- Articles of apparel & clothing access, of leather or composition leather (HS 4203),
- Articles of leather or composition leather, nesoi. (HS 4205),
- Articles of gut, of goldbeater's skins, of bladders or of tendons (HS 4206),
- Saddlery and harness for any animal, of any material (HS 4201),
- Articles of leather or composition leather for technical uses (HS 4204).



LIST OF EXPORTERS



ADIRA SEMESTA INDUSTRY, PT

Jl. Parakan Muncang 53, Desa Sindanggalih
Rancaecek - 45364 Jawa Barat
Phone : (62-22) 7911834, Fax : (62-22) 7911655
Email : meying@asiglove.com
Products : Gloves of Leather Specially Design
For Use In Sports, Leather Products

KEGA (FASHION ADDICT INDONESIA), PT

Jl. Andara Ujung II No. 35 Kav. Pertamina,
Pangkalan Jati Baru - Pondok Labu - 12450 D. K. I. Jakarta
Phone : (62-21) 7665648, 78556007, 91303484
Fax : (62-21) 7665648
Email : fashionaddict.indonesia@yahoo.com
Products : Footwear, Handbags With Outer
Surface of Leather, Handbags With Outer
Surface of Other Material

RUMINDO PRATAMA, PT

Jl. Parangtritis Km. 4,5 - 55185 D. I. Yogyakarta
Phone : (62-274) 379090, 380006
Fax : (62-274) 379105, 6497373
Email : info@rumindo.com, ninaw@rumindo.com
Website : www.rumindo.com
Products : Handbags With Outer Surface of Leather

APAC CITRA CENTERTEX Tbk, PT

Graha BIP 6th Floor, Jl. Gatot Soebroto Kav. 23 - 12930
D. K. I. Jakarta
Phone : (62-21) 5228888, 5225222
Fax : (62-21) 5258300, 5258400
Email : info@apacinti.com
Website : www.apacinti.com
Products : Articles of Apparel of Leather

GENTA BALI, UD

Jl. Gunung Sanggabuana Selatan II/4,
Monang-maning - 80119 Bali
Phone : (62-361) 488286, Fax : (62-361) 488286
Email : wibisono700@yahoo.com
Products : Leather Products

DESCHINO SPORT, CV

Jl. Raya Penggilingan Komplek. PIK Blok B40/41
Cakung - 13940 D. K. I. Jakarta
Phone : (62-21) 4600054, Fax : (62-21) 4600054
Email : info@deschinosport.co.id,
deschinosport@yahoo.com
Website : www.deschinosport.co.id
Products : Gloves of Leather For Other Purposes, Gloves of
Leather Specially Design For Use In Sports

WIYARTA LANGGENG, PT

Jl. Cempaka Putih Barat XXVI/18A,
Cempaka Putih - 10520 D. K. I. Jakarta
Phone : (62-21) 37777399, Fax : (62-21) 37777399
Email : info@exotiqleather.com
Website : http://exotiqleather.com/
Products : Leather Products

NICE LEATHER, CV

Jl. Pulomas III No. 18 - 13210 D. K. I. Jakarta
Phone : (62-21) 4897886, 4710710
Fax : (62-21) 4897886
Email : lily_sabdi@yahoo.com
Products : Footwear, Handbags With Outer Surface of
Leather, Sandal & Bathing Slippers

GENDHIS NATURAL BAG, Others

Ring Road Barat Gg. Jeruk Bedog - Trihanggo,
Gamping - 55291 D. I. Yogyakarta
Phone : (62-274) 6499151, 9254455
Fax : (62-274) 6499151
Email : gendhis@gmail.com, gendhisbag@yahoo.com,
gendhisbags1@yahoo.com
Website : www.gendhisbag.com
Products : Clothing Accessories of Leather,
Handbags With Outer Surface of Leather

GIORGIO AGNELLI (GA), Others

Ruko Daan Mogot Baru,
Jl. Jimbaran Blok LB 1/12 - 11840 D. K. I. Jakarta
Phone : (62-21) 5443715, Fax : (62-21) 5443715
Email : mardjulis@gmail.com,
suryaindahmajoe@gmail.com
Products : Articles Like Handbags, With Outer Surface of
Leather, Articles of Leather or of Composition
Leather, Belts And Bandoliers of Leather,
Handbags With Outer Surface of Leather, Oth.
Trunks, Suitcase, Etc, N.E.S

BAGUDA WEAR BANYUWANGI, PT

Jl. Gambor No. 76, Dsn. Bangunrejo RT. 05/2
Ds. Alasmalang - Singojuruh - 68464 Jawa Timur
Phone : (62-333) 8261189, 630310
Fax : (62-333) 630093
Email : rogerkhaw@bagudawear.com,
info@bagudawear.com
Website : www.bagudawear.com
Products : Gloves of Leather For Other Purposes,
Leather Products

SDX BALI, Others

Jl. Raya Seminyak No. 61 K-25, Seminyak - 80361 Bali
Phone : (62-361) 8828979, Fax : (62-361) 8828979
Email : sdx.bali@yahoo.com
Website : www.sdxbali.com
Products : Handbags With Outer Surface of Leather,
Leather of Reptile

MAJU MAKMUR, Others

Jl. Raya Kludan No. 42, Tanggulangin - 61272 Jawa Timur
Phone : (62-31) 8943202, Fax : (62-31) 8958317
Email : info@majumakmur.asia
Website : www.majumakmur.asia
Products : Footwear of Leather, Handbags With Outer
Surface of Leather, Leather Products

CITRA BARU BUSANA (Shoes & Socks Industry)

Alea Shoes (Parker shoes)
Jl. SanggarKencana VI, No. 14 - 16 A SanggarHurip Estate
Bandung, 40286. West Java - Indonesia
Phone : +6222-7335644, Fax : +6222-7317309
Email : headoffice@aleashoes.com
headoffice@citrabarubusana.com
Website : www.parker.co.id, www.aleashoes.com

GAMMA LEATHER (Leather bag products)

Jl. Cigadung Raya Barat no. 28 Kav. 4 Bandung
Phone : +6285624474408
Email : Adityalugina@GAMMARA.CO.ID

JK COLLECTION (Shoes)

Jl. Cibaduyut Raya no. 27 Bandung, Jawa Barat 40236
Phone : 022-5407304-5413146
Email : jk-collectionshoes@yahoo.com
jk-shoescollection@gmail.com
Website : www.jkshoescollection.com

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Website : -

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ext.120
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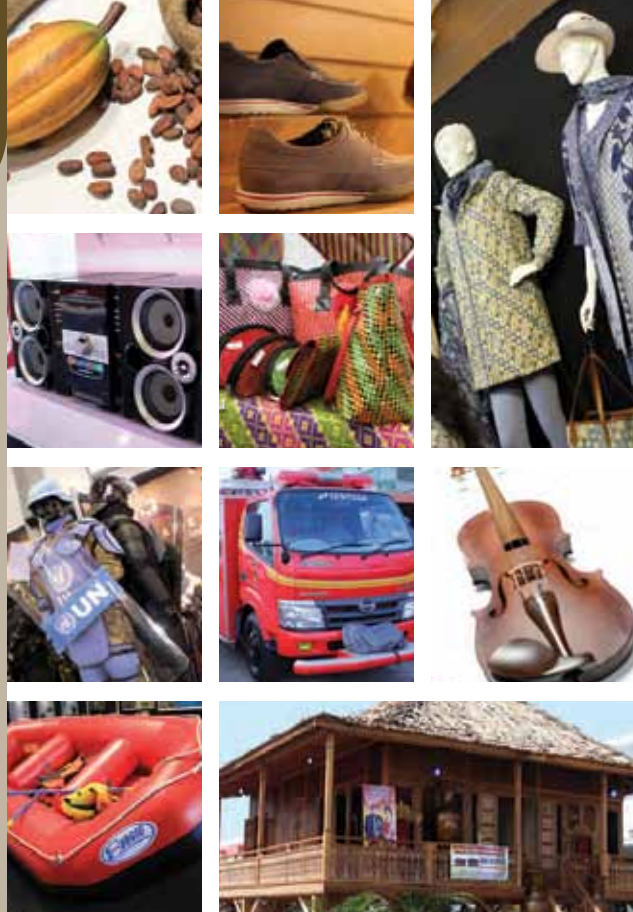
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