




Indonesia Hand Made Soap Innovation

WHAT'S INSIDE



The innovation of handmade soap is the key to success in entering the World soap market, especially in the European Union. Value-added soap products such as the use of environmentally friendly materials, biodegradable soap packaging, plus hand-made soaps, will be able to differentiate soap products from other competitors.

editor's desk

Dear valuable readers,

As the country's third exporter of soap products to the world, as well as has successfully exported to various countries in the world, Indonesia has considerable potential in the soap industry. The abundance of natural resources such as palm oil and coconut oil as ingredients from the soap industry is one of Indonesia's competitiveness.

Although the world economy experienced a slowdown, it did not affect the demand for world soap, which in the last 5 years has experienced a significant increase. Overall the value of growth reached 2.29%/year with almost some countries experiencing similar growth. Some countries such as the United States, Germany, United Kingdom, Canada, France, the Netherlands and China have felt an increase in demand for soap.

The Indonesian Soap Industry itself has also experienced positive growth for the past 5 years, with an average increase of 3.35% / year making Indonesia superior to Malaysia in 2018. Thus, through the synergy of relevant Ministries / Agencies, it is expected that the soap industry will continue to advance to meet potential world markets.

Thank You



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HOT ISSUE

Indonesia

Hand Made Soap Innovation

Handmade Soap Innovation, as one of the keys to market soap products to the World, especially the European Union.



Demand for soap products (HS 3401) the world for the last 5 years (2014 to 2018) recorded a positive growth of 2.29% / year, based on UN COMTRADE statistics, in 2014 the value of World imports was recorded at US \$ 10.24 billion and continued to grow reached US \$ 10.92 billion in 2018. This shows that the world soap demand is experiencing significant growth, so this is an opportunity for Indonesian exporters;

Soap demand growth also occurs in the European Union, where the import value of soap products (HS 3401) in 2014 reached US \$ 3.48 billion and continued to increase to US \$ 4.14 billion in 2018. Increased demand was recorded at 4 , 87% / year.

By looking at the statistics of today's data above and the lifestyle of today's society, the growth in demand for soap is an impact of the changing lifestyles of the world's people who prefer environmentally friendly products, handmade and derived from organic ingredients.

Some of the reasons why they switched from not using detergent as a cleaning agent (which can damage the skin and are not environmentally friendly), have a pH level of 9-10, which makes the skin softer, and has a natural aroma as an aromatherapy;

Handmade innovation is also one way / strategy to differentiate or differentiate products from others, so that they can attract the attention of world consumers. The European Union itself has unique demand characteristics, where handmade soap offers more value for consumers. Handmade innovations that are also integrated with sustainability and environmentally friendly make it key in marketing soap products to the European Union (Source: CBI);

Sustainability is still a concern and lifestyle for EU consumers, because by buying sustainable products, they have indirectly helped to reduce

pollution and keep the earth greener. The sustainability concept can be applied to soap products that are economical and environmentally friendly or by using biodegradable packaging;

Some of the advantages of handmade soap with conventional soap are handmade soap originating from a combination of oil and fat or fatty acids, in ordinary soaps the use of detergent and other chemicals is often used, so long-term consumption can cause damage to the skin.

The next advantage such as handmade soap contains glycerine which can make the skin softer, while conventional soap, glycerine content is lost in the process of making soap.

The process of making soap in a sustainable manner must be well documented in the form of a standard of procedure, so that it can be applied consistently because prospective buyers, especially from the European Union, often ask this before deciding to buy a sustainable product.

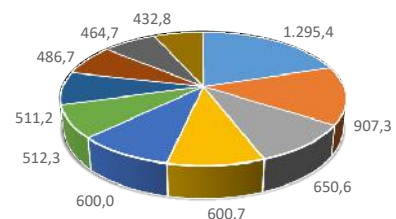
One of the trends in the European Union related to the consumption of soap products is the desire of EU consumers to improve their physical and mental health through making their homes like being in a Spa or beauty home. EU consumers are willing to spend bathing time for relaxation after a day of activities, so natural and handmade soaps here are important keys.

The Ministry of Trade has formulated several policies to support Indonesian exporters in entering potential markets such as the European Union. Indonesian exporters are expected to be able to take advantage of Trade Representatives who are overseas, especially the European Union, to gain insight into market trends, consumption, consumer preferences and other successful tips that are useful for improving Indonesian exporters' businesses.

MARKET REVIEW



List of Exporter for Soap (HS 3401) in 2018
(Value is in US\$ Million)



- Germany
- United States of America
- Indonesia
- China
- Malaysia
- United Kingdom
- Poland
- Japan
- Italy
- Netherlands

Indonesia is one of the exporters of World soap products with a market share of 5.98% in 2018. The soap industry (HS 3401) in Indonesia for the past 5 years (2014-2018) has recorded significant growth with a growth value of 3.35% / year, where in 2014 the export value reached US \$ 623.20 Million and in 2018 reached US \$ 650.59 million. The export value makes Indonesia the third country exporter of soap products to the World;

The other major exporter in the world for soap products is Germany, which in 2018 recorded an export value of US \$ 1.29 billion, representing 11.9% of the world market share, then the United States with an export value of US \$ 907.25 million or representing 8.34% market share the world in 2018;

The export value of World soap products also recorded positive growth with an average value of 2.14% / year, which in 2014 reached an export value of US \$ 10.36 Billion and continued to grow to reach US \$ 10.88 Billion in 2018.

To see more, soap products and derivatives that are reviewed in this market review, we need to look at soap products and derivatives based on the HS 6 Digit code, namely:

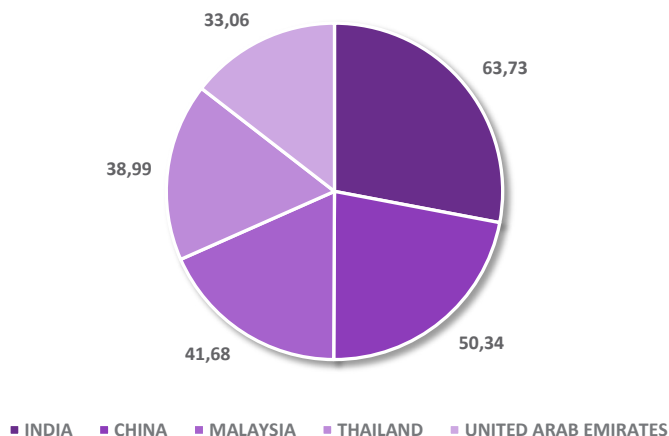
No.	HS Code	Product Description
1.	340111	Soap and organic surface-active products and preparations, in the form of bars, cakes, moulded ...
2.	340119	Soap and organic surface-active products and preparations, in the form of bars, cakes, moulded ...
3.	340120	Soap in the form of flakes, granules, powder, paste or in aqueous solution
4.	340130	Organic surface-active products and preparations for washing the skin, in the form of liquid ...

Indonesian Soap Industry (HS 3401) itself in 2018 if based on the HS6 Digit group, namely:



Soap is a mixture of sodium or potassium salt with animal or vegetable oils. Soap can be a liquid, solid, and soft form. The use of palm oil as a soap base material is often used on large scale / soap factories. Some soap companies in Indonesia, namely PT. P & G, PT. Unilever, PT. Kao Indonesia, PT. Megasurya Mas, and PT. Total Chemindo Loka;

Indonesia export of Soap (HS 3401) to World in 2018 (Value is in US\$ Million)

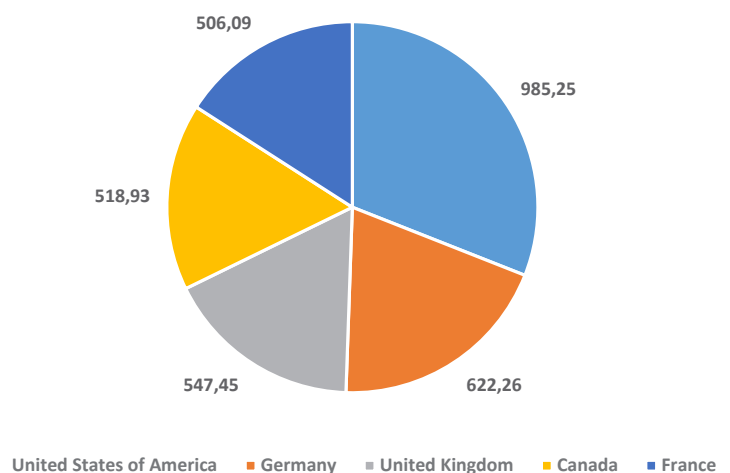


Indonesian Soap Products have been successfully exported throughout the World, the top 5 countries with the largest export value in 2018 namely (1) India with a value of US \$ 63.72 Million, (2) China with a value of US \$ 50.34 Million, (3) Malaysia with US value \$ 41.68 Million, (4) Thailand with a value of US \$ 38.99 Million, and (5) United Arab Emirates with a value of US \$ 33.06 Million;

To see the quality of soap can be seen from the smell and color of soap. Other features are natural or natural-based (such as aloe vera, jojoba, etc.), environmentally friendly, displaying information from soap, and made by hand. In the European Union itself, environmentally friendly soap has a high demand;

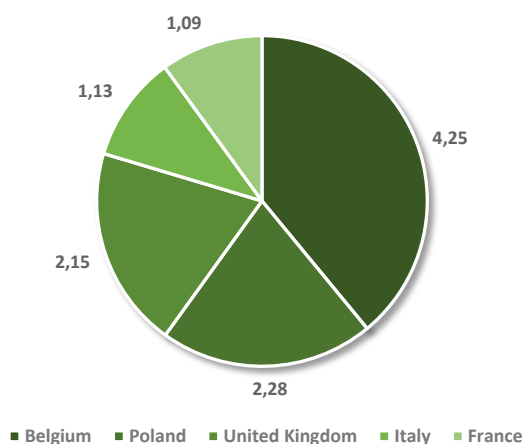
While the 5 World countries that have the highest demand for Soap products in 2018 are the United States with a value of US \$ 985.25 Million, Germany with a value of US \$ 622.26 Million, United Kingdom with a value of US \$ 547.45 Million, Canada with a value of US \$ 518.93 Million and France with value of US \$ 506.09 Million;

List Importer of Soap (HS 3401) in 2018 (Values is in US\$ Million)



Indonesia's export performance for Soap products (HS 3401) to the EU Region in 2018 only records export value of US \$ 14.34 Million, to export destination countries such as Belgium with a value of US \$ 4.25 Million, Poland with a value of US \$ 2.28 Million, United Kingdom with value of US \$ 2.14 Million, Italy with a value of US \$ 1.13 Million and France with a value of US \$ 1.09 Million;

Indonesia export of Soap (HS 3401) to the European Union (EU-28) in 2018
(Values in US\$ Million)



Imports of European soap are expected to continue to increase, with soap products sourced from developing countries. The main importers of soap in Europe, namely Germany, France and the UK are attractive markets. Meanwhile, soap products from developing countries are mostly included in the United Kingdom market, making United Kingdom a potential and promising market;

Trade in soap products in the European Union is dominated by Intra EU countries such as Germany, Britain and the Netherlands. Developing countries that have successfully marketed soap products in the European Union Region based on EU Stat 2016 data, namely Turkey (5.9%), followed by China (3.6%) and Malaysia (1.9%).

The trend of soap on the EU market has become a new lifestyle that is separated from the traditional category. Soap combines health & body care markets, gifts / souvenirs, and home deodorizers, so soap has 3 market segments (low, medium-high, and premium / luxury);

The lower / lower market segment is dominated by bulk soap products which are positioned as soap in a way that Indonesian businesses are advised not to target this market segment. Then the mid-high market segment, soap is expected to have added value such as sustainability aspects, environmentally friendly, handmade, and the origin of soap products. Whereas in the premium / luxury market segment, soap offers this added value but is also added with natural ingredients, unique and has an international brand;

The price of soap in the European Union depends on the perception of value by consumers in the market segment of Ternate. This is influenced by the marketing mix of soap products offered. Some aspects / factors in question such as the benefits of the product, promotion, place of sale (reseller positioning), and the appropriate price.

In general the price range sold to consumers in low market segments ranges from € 0 - € 1, while in the mid-high market segment ranges from € 1 to € 10, and in the premium / luxury market segment ranges from € 10 to up;

Indonesian business people are expected to be able to learn about various segments of the soap market in the European Union and better position their products. More functional soap products must be made in bulk and are more price sensitive. As for the mid-high market segment, soap products are expected to offer other functions such as natural and environmentally friendly materials. For the premium market segment, more added value is needed such as attractive packaging, hand-made, special aroma, and certified;

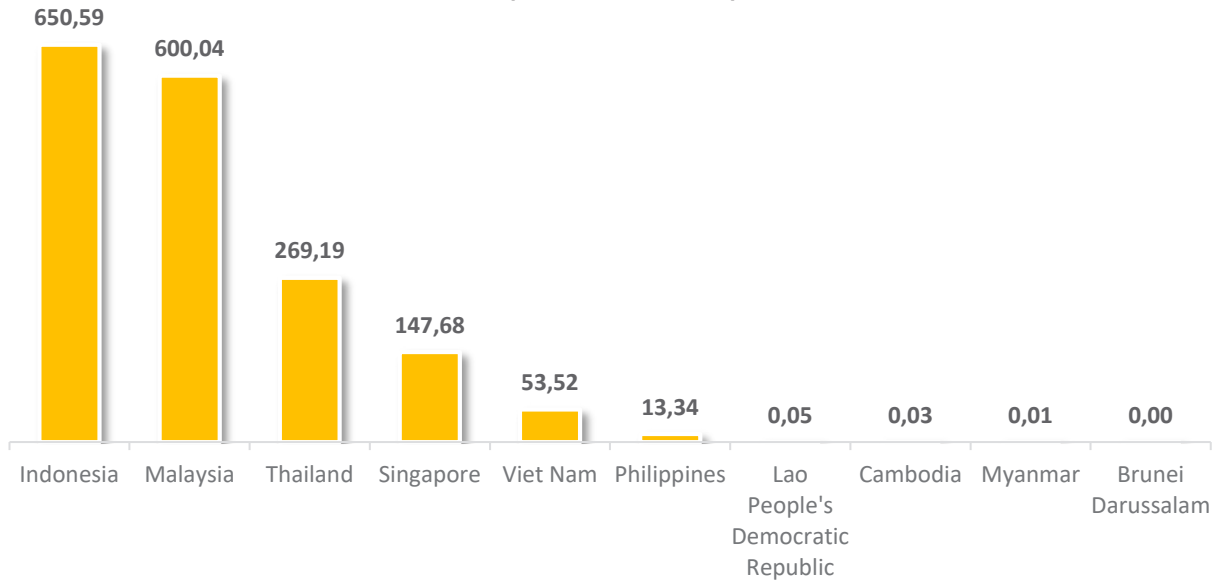
The marketing or distribution channels in the European Union are not much different from the products in other sectors, so the distribution channel soap products that can be explored are with large importers / distributors and retailers;

Marketing of soap products using E-commerce marketing channels can be taken into consideration because large EU importers combine offline and online marketing before deciding to buy products. EU consumers generally conduct research and purchases online, in the process they will also compare with other similar products to get competitive prices. Indonesian business people who want to do marketing online, must be able to ensure the production is available and can be sent quickly;

Indonesian competitors for Soap products from other ASEAN countries in 2018 to the World are Malaysia with an export value of US \$ 600.04 Million, followed by Thailand US \$ 269.19 Million, Singapore US \$ 147.68 Million and Vietnam US \$ 53.52 Million.



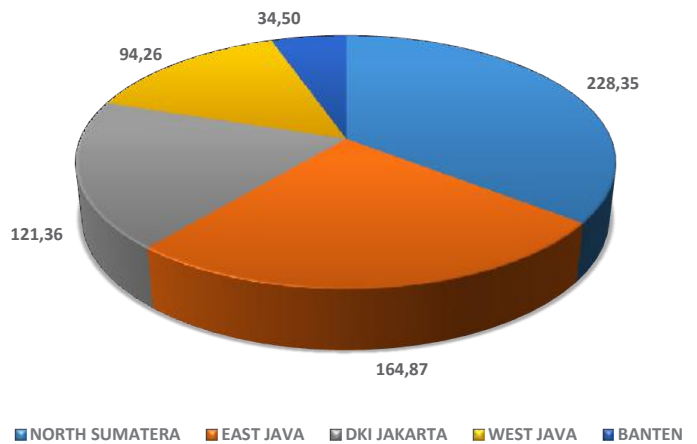
List of ASEAN Exporting Countries of Soap (HS 3401) to World in 2018
(Values is in US\$ Million)



The trade performance of soap products from the ASEAN Region to the world shows positive growth with an average increase of 1.04% / year, where in 2014 the export value reached US \$ 1.56 Billion and continued to grow to reach US \$ 1.73 Billion in 2018. In 2018 alone, the export value represented 15.94% of the world market share;

Whereas the export of Indonesian soap products if based on the province in 2018 is North Sumatra with an export value of US \$ 228.35 Million, followed by East Java with an export value of US \$ 164.87 Million, DKI Jakarta with an export value of US \$ 121.36 Million, West Java with US export value \$ 94.26 Million and Banten with export value of US \$ 34.49 Million;

Indonesia Export of Soap (HS 3401) to World in 2018
by Province (Values is in US\$ Million)



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