



The contribution of Indonesian perfume and eau de toilette is still very small in the world, but this product can compete and has been exported to countries such as Singapore, UAE, Malaysia, and Hongkong.



trade with remarkable indonesia

FROM EDITOR'S DESK

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Dear Valued Readers,

Here we go again, starting another year filled with high optimism that this year will be another successful and prosperous year. To start the year fresh, the Directorate General Nasional for Export Development (DGNED), Ministry of Trade, Republic of Indonesia, brings you perfume and eau de toilette in the January edition of Export News.

Indonesia has experienced companies producing such products and some of them have sophisticated technology to process and manufacture the product.

In the global export market, Indonesia has a significant growth trend in the 2007-2011 period with an average annual growth rate of 55.56%. Singapore was the main destination of the perfume's export.

This edition features Indonesian perfume and eau de toilette industry including its export performance in the past years and various products. We also include the list of exporters complete with addresses and contact persons so that an immediate communication can be established for a profitable deal.

We expect all information provided in the bulletin will equip you with necessary information to grasp business opportunities in this promising year.

Thank You

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hot issue

ne use of fragrances to enhance one's appearance can be traced to some of the earliest human civilizations through artefacts from archeological findings or old manuscripts while modern perfumery, as we know it today, is believed to start in the late 19th century.

Perfume can be defined as a mixture of fragrant essential oils or aroma compounds, fixatives and solvents used to give an object, human body, animals, food and living spaces, pleasant scent.

Modern perfume consists of the commercial synthesis of aroma compounds such as vanilin or coumarin, which allowed for the composition of perfumes with smells previously could not be acquired from natural aromatics.

Hot Issue

Perfume can be divided into several types according to its concentration of aromatic compounds in a solvent. In fine fragrance, the solvent is typically ethanol or a mix of water and ethanol. There are various definitions of perfume types. The intensity and longevity of a perfume is based on the concentration, intensity and longevity of the aromatic compounds (natural essential oils/perfume oils) used. The higher percentage of aromatic compounds being used, so is the intensity and longevity of the scent created.

A list of common terms (Perfume-Classification) is as follows:

- Perfume extract, or simply perfume (extrait): 15-40% (IFRA: typical 20%) aromatic compounds
- Esprit de Parfum (ESdP): 15-30% aromatic compounds, a seldom used strength concentration in between EdP and perfume
- Eau de Parfum (EdP), Parfum de Toilette (PdT): 10-20% (typical ~15%) aromatic compounds, sometimes listed as "eau de perfume" or "millésime." Parfum de Toilette is a less common term that is generally analogous to Eau de Parfum.
- Eau de Toilette (EdT): 5-15% (typical ~10%) aromatic compounds
- Eau de Cologne (EdC): Chypre citrus type perfumes with 3-8% (typical ~5%) aromatic compounds.
- Perfume mist: 3-8% aromatic compounds (typical non-alcohol solvent)
- Splash (EdS) and aftershave: 1-3% aromatic compounds.

The International Fragrance Association (IFRA)

In 1973, IFRA (the International Fragrance Association) was founded to represent as coordinator assistance of the fragrance industry worldwide. The countries in which include membership of IFRA are Australia, Europe, the Far East and North and South America. IFRA is an association that helps of any health problems arising from the perfume and toiletries use, i.e. allergies, etc. Regulation on intellectual property, chemicals, occupational health and safety, and cosmetics, among others, is also relevant to the fragrance industry.



The use of perfumes, colognes, and products which contain fragrance have increased over the past few decades. Since the 1970s fragrance has become a part of our daily life. Scented products are generally received as pleasant, harmless and certainly not a significant health concern.

The perfume industry has traditionally been a very secretive industry. Secrecy was required to protect fragrance formulas from being copied by others. Fragrance formulas are considered "trade secrets" and do not have to be published to anyone, including regulatory agencies. On the label, only the word fragrance must appear in the list of ingredients. The secrecy of the industry has led to tremendous problems in terms of regulation, monitoring, and impact on those that have health problems from fragrance ingredients.

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- 6. The Jakarta Post: www.thejakartapost.com
- 7. Bisnis Indonesia Daily: www.bisnis.com
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- 9. Tempo: www.tempointeraktif.com
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THE SCENT INDONESIAN Perfume and Eau De Toilette



World's Import

world's import of perfume and eau de toilette, which are grouped under the Harmonized System (HS) code 3303 has shown a consistent increase in the 2007-2011 period despite a small hiccup due to the 2008-2009 global financial crisis.

The world imported US\$11.98 billion worth of perfume and eau de toilette in 2007 which then increased to US\$13.50 billion in 2008. The figure dropped slighly in the following year to US\$12.061 billion, which was still higher than 2011's figure. The import bounced back to US\$13.51 billion in 2010 and kept going stronger in 2011 with an import of US\$15.51 billion. This means that there was an average annual growth of 5.31% in the 2007-2011 period with a significant 14.81% growth from 2010 to 211.

The United States and Germany topped the list of the Top 10 importing countries with import figures of US\$1.91 billion and US\$1.71 billion respectively in 2011. Both countries, with 12.31% and 11.06% of market shares respectively, were the only countries exporting more that US\$1 billion of perfume and eau de toilette in 2011.

Meanwhile, ranked No. 38, Indonesia's import rose dramatically from US\$13.63 million in 2007 to US\$72.38 million in 2011 for an average growth of 51.20% in the period. The import skyrocketed from US\$38.88 million in 2010 to US\$72.38 million in the next year for an 86% increase.

In 2011, Indonesia exported most of its perfume and eau de toilette from France at US\$41.50 million or 57.38% of the total import that year. In the first

Market **Review**

11 months of 2012, the import from France stood at US\$41.45 million, or 5.39% higher from the same period in 2010 at US\$39.33 million.

Other important sources of import in 2011 was the United Kingdom and Italy at US\$8.86 million and

US\$8.44 million respectively. Imports from both countries showed an even higher trend than from France in the first 11 months of 2012. The import from the United Kingdom was US\$11.16 million while from Italy was US\$9.82 million, already much higher than the full year import in 2011.

Import of Perfume And Toilet Waters from the World by Country of Origin

No	Countries	Imported value (US Dollar thousand)					Trend %	Growth	Share %
NU		2007	2008	2009	2010	2011	(07-11)	% (10-11)	(2011)
	All Countries	11,985,108	13,504,306	12,061,638	13,517,628	15,519,136	5.31	14.81	100
1	United States of America	1,542,756	1,698,202	1,350,074	1,652,170	1,910,982	4.09	15.66	12.31
2	Germany	1,196,843	1,396,304	1,300,365	1,414,365	1,717,127	7.62	21.41	11.06
3	United Kingdom	933,041	881,768	828,349	870,820	931,057	-0.17	6.92	6.00
4	United Arab Emirates	484,359	569,320	560,196	617,781	733,437	9.54	18.72	4.73
5	Netherlands	492,043	615,698	575,070	520,433	629,071	3.29	20.87	4.05
6	Russian Federation	438,233	484,583	407,150	566,661	611,570	8.58	7.93	3.94
7	Spain	488,691	578,173	572,990	604,100	595,002	4.47	-1.51	3.83
8	Singapore	420,306	442,308	340,389	472,674	546,363	6.09	15.59	3.52
9	Italy	426,076	482,454	388,181	476,930	520,782	3.98	9.19	3.36
10	France	401,164	457,334	392,629	416,002	441,741	0.98	6.19	2.85

Sources: ITC calculations based on UN COMTRADE statistics

World's Export

export of the goods categorized under HS 3303 to the world also showed a strong trend in the 2007-2011 period. The world exported US\$13.64 billion in 2007 and jumped to US\$15.24 billion in the following year before crashed to US\$12.67 billion in 2009. The export of perfume and eau de toilette managed to bounce back in 2010 with US\$ 14.52 billion and fully recovered in 2011 with a strong figure of US\$16.73 billion. This gives an average growth of 3.67% in the period or a respectable 15.22% increase from 2010 to 2011.

France was the top exporter in 2011 despite suffering from an average contraction of 1.33% in the 2007-2011 period. France exported US\$4.76 billion in 2007 and US\$4.87 billion in 2011, an incresae of 13.79% from US\$4.28 billion in 2010.

Germany showed a much better performance of 6.12% although the export values were still far below those of France. In 2007, Germany exported 1.64 billion which steadily increased to US\$2.22 billion in 2011, an increase of 16.55% from 2010's figure of US\$1.90 billion.

Meanwhile, Indonesia was ranked No. 20 after exporting US\$14.06 million in 2007 followed by an increase to US\$17.86 million in 2008. The global financial crisis did not seem to affect Indonesian export in 2009 with US\$17.95 million. The figure was getting even stronger in 2010 with US\$39.42 million and ended the 2007-2011 period with an export of US\$86.20 million, an 118.64% increase from 2010. The average growth was 55.56%.

The main export destination countries for Indonesian perfume and eau de toilette were Singapore, the United Arab Emirates, Malaysia, and Hongkong. Singapore was Indonesia's largest export destination with a 62.76% market share in 2011 at US\$54.10 million. The average growth in th 2007-2011 period was 134.30%. As of November 2012, the export was US\$59.32 million, much higher than the full year export in 2011. The figure represented a 16.82% from export figure in the first 11 months of 2011 at US\$50.78 million.

Another important export destination was the United Arab Emirates with an export of US\$17.70 million in 2011 for a market share of 20.53%. Export to the United Arab Emirates showed an average groth of 21.54%. Unlike export to Singapore, however, export to the United Arab Emirates suffered a 28.62% decrease in the first 11 months. The export in the first 11 months of 2011 was US\$15.76 million compared to only US\$11.25 million in the same period of 2012.

Export of Perfume and Toilet Waters to the World by Country Destination

No	Countries	Exported value (US Dollar thousand)						Growth	Shara 9/
		(07-11)	Growth % (10-11)	Share % (2011)	2010	2011	Trend %	% (10-11)	Share % (2011)
		2007	2008	2009	2010	2011			
	All Countries	13,646,132	15,240,218	12,676,380	14,527,798	16,739,216	3.67	15.22	100
1	France	4,763,931	5,138,016	4,116,255	4,286,463	4,877,402	-1.33	13.79	29.14
2	Germany	1,645,126	1,920,946	1,598,288	1,906,692	2,222,173	6.12	16.55	13.28
3	United States of America	1,229,483	1,375,506	1,267,003	1,486,640	1,603,604	6.28	7.87	9.58
4	Spain	673,923	832,575	855,298	1,094,223	1,271,255	16.68	16.18	7.59
5	Italy	838,937	886,426	635,570	800,156	964,440	1.78	20.53	5.76
6	United Kingdom	773,478	811,276	714,847	770,297	848,567	1.34	10.16	5.07
7	Singapore	539,884	623,665	444,612	561,790	667,388	3.25	18.80	3.99
8	Belgium	335,740	393,425	369,711	404,034	528,354	9.78	30.77	3.16
9	Netherlands	409,026	447,595	426,965	472,802	520,082	5.50	10.00	3.11
10	Panama	279,621	323,811	282,882	361,914	512,583	14.15	41.63	3.06

Sources: ITC calculations based on UN COMTRADE statistics

EXPORTING COMPANY PROFILES

PT MANDOM INDONESIA, TBK

PT Mandom Indonesia was established in 1969 and is affiliated with Mandom Corporation Japan. The company started commercial production in 1971 when initially the company produced hair care products before producing perfume and cosmetics.

The company's main brands include Gatsby, Pixy, and Pucelle. In addition, the company also manufactures a wide range of other products under the brand Tancho, Mandom, Spalding, Lovillea, Miratone, as well as some brands specifically manufactured for export markets. Mandom also exports its perfume products to several countries including the United Arab Emirates (UAE), Japan, India, Malaysia and Thailand.

Through the UAE, the Company's products has been re-exported to various countries in Africa, the Middle East, Eastern Europe, and others.

The public listed company has started to relocate its production from Japan to Indonesia since 2008 by buying a 14.6-hectare plot of land in Cibitung, West Java with a capital of Rp 80.43 billion. The land acquisition was not only to serve the relocation but also building a new factory in the long term.

Mandom's products include:

1. Gatsby

Gatsby is an excellent product focusing on male consumers. The types of perfumes being produced under the brand Gatsby are cologne, perfume, and Eau de Toilette.

2. Pucelle

The brand is cologne products made for teenage girls.



3. Pixy

Pixy is a consumer brand created for active women with line products such as fragrance and deodorant.



EXPORTING

SEKAWAN COSMETIC

SEKAWAN Cosmetics has been producing cosmetics since 1986 in Sidoarjo, East Java. With over 20 years of experience, SEKAWAN Cosmetics has the sensitivity to provide a new and unique touch on every consumer's needs. This knowledge allows the company to provide the right solutions for their partners in fulfilling consumer desires.

Since 2005, the company has exported its products to more than 14 countries in the Middel East, Africa and Asia. The countries included Yemen, Syria, Sudan, the United Arab Emirates, Nigeria, the Philippines, Cambodia, Vietnam, Hong Kong and Taiwan.

Perfume and eau de toilette produced by SEKAWAN cosmetics include:

1. AINIE

The brand is aimed for female consumers with various products including perfume, splash cologne, fresh cologne spray, perfume spray, aromateraphy oil roll on and deodorant spray in addition to the wider range of cosmetics products.







2. Shantos ROMEO

The brand is focusing on male consumers with products including deodorant spray, perfume spray, fresh cologne and Eau de Toilette.



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