



EXPORT *News* INDONESIA

Ditjen PEN/MJL/48/VII/2017

Aluminum Industry in Indonesia



WHAT'S INSIDE

Aluminum is one of the prospective commodities in the future, since it is environmentally friendly. In the global market, the demand of aluminum is predicted to keep growing until 2035, mainly in Asia and South America markets.

editor's desk



Dear Precious Readers,

One of the export commodities with high world demand is aluminum. Throughout the year of 2016, total export value of this product in the international trade reached USD 157.43 billion, in which China, Germany and the United States succeeded as the three largest aluminum exporting countries in the world. Meanwhile, Indonesia was still ranked at 51st position as the exporter of aluminum and its derivative products, the export performance valued of USD 395.96 million.

Therefore, in order to respond to the world's enormous demand, the export news bulletin of this edition raised the topic about the aluminum industry in Indonesia. Aluminum is one of the prospective commodities in the future, since it is environmentally friendly. Aluminum is made from a mixture of 66% bauxite and 33% clay. The national bauxite sources in Indonesia are located in Riau Islands, Bangka Belitung, West Kalimantan, South Sulawesi, Central Maluku and Papua.

The development of aluminum industry in Indonesia is also supported by the availability of energy resources, which is the

largest component in the production process of aluminum and its derivative products. Other components affecting production costs are alumina, freight, capital expenditure, corporate charge, carbon usage, and labor cost. In Indonesia, the energy or power source utilized to conduct the aluminum industry is water or hydropower.

Another issue related the global aluminum trade is the anti-dumping practice between countries. Thus, the Ministry of Trade of the Republic of Indonesia provides a specialized agency dealing with anti-dumping issues called the Indonesian Anti-Dumping Committee or *Komite Anti Dumping Indonesia* (KADI). In relation to the dumping problems that could disrupt the fair trade mechanism, both exporters and importers of aluminum in Indonesia are also expected to apply fair and honest international trade practices.

Thank You

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Indonesian Trade Promotion Center (ITPC)



HOT ISSUE



Anti-dumping Issues on the Aluminum Industry

As with other commodities, the international trade for aluminum products is also inseparable from anti-dumping issues. The entry of imported goods with a cheaper sale price will harm the domestic industry of a country. Therefore, almost all countries apply the anti dumping practice.

Recently, the US government has filed anti-dumping duty to the World Trade Organization (WTO) regarding imported aluminum foil from China. Its national Aluminum Association revealed that aluminum foil is being imported into the country at below-market prices. It is reported that the Chinese aluminum foil was sold cheaper in comparison to the cost of production in the United States

On the other side, India also imposed the anti-dumping duty on imported aluminum foil from China. In its final findings, the Directorate General of Anti- Dumping and Allied Duties (DGAD), under the commerce ministry, has found that the foil has been exported to India from China below its normal value which has resulted in dumping. It has recommended an anti-dumping duty in the range of USD 0.69 per kg to USD 1.63 per kg on the imports.

In 2010, Indonesia imposed anti-dumping duty on an aluminum food storage which is commonly used to serve food for airline passengers, or also known as named as aluminum mealdish. The HS (Harmonized System) code of the product is 7612.90.90.00. In respond to the issue, the Ministry of Finance of the Republic of Indonesian enacted a regulation number 145/PMK.011/2010, about "The Imposition of Anti Dumping Duty on the Import of Aluminum Mealdish (Lacquered Tray with or without Lid) from Malaysia".

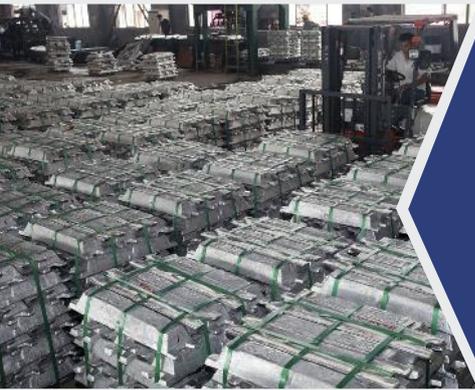
Based on the investigation results of the Indonesian Anti Dumping Committee, there was evidence of dumping practice towards Aluminum Mealdish (lacquered trays with or without lid) from Malaysia, causing harm to the domestic industry, thus necessary to impose anti-dumping duties on Aluminum Mealdish (lacquered tray With or without lid) from Malaysia. Therefore, the Ministry of Finance of Republic of Indonesia had set up the imposition of anti-dumping duty on the import of the imported product by 27 percent.

Last year, through the letter number 1000/KADI/XII/2016, dated on 23 December 2016, the Indonesian Anti Dumping Committee announced the initiation of an anti-dumping investigation into the import of Aluminum Zinc Alloy Steel (BJLAS) Colored HS 7210.70.10.00, 7212.40.10.00 and 7212.40.20.00 originating from China and Vietnam. The investigation is based on a request from PT NS BlueScope Indonesia, which represents the domestic industry.

The period of investigation is from July 2015 to June 2016, with total import amounted to 224,120 tons, in which 87,5 percent came from China and Vietnam. Investigations will be conducted within 12 months and if required can be extended for up to 18 months.

WORLD TRADE
ORGANIZATION





MARKET REVIEW



Indonesia's Aluminum Industry

Aluminum is made from a mixture of 66% bauxite and 33% clay. The electrolysis process use a temperature of 950-970 degrees. Aluminum is categorized into light metal groups that can be cast, crushed, bent, pressed and welded. Aluminum is possible to be damaged by lime, gypsum, mortar and concrete. The important characteristics of aluminum are mild (only 2.7 gram / cm³, whereas iron ± 8.1 gram / cm³); resistant to corrosion; good electrical and heat conductor; easy on fabrication (to be formed); and low in strength yet can be improved.

Aluminum is one of the prospective commodities in the future, since it is environmentally friendly. Besides that, in relation to the issue of wood scarcity due to global warming problems, aluminum can be also a substitution of wood to be used in the production of furniture, windows, doors and other building materials. Therefore, Prof. Dr. Werner Gocht from Aachen University, Germany, also said that aluminum is classified as basic metals which needed by human. In the implementation, aluminum can also be used to make sophisticated products, food wrappers, packs of medicines, electronics equipment, transportation equipment and others.

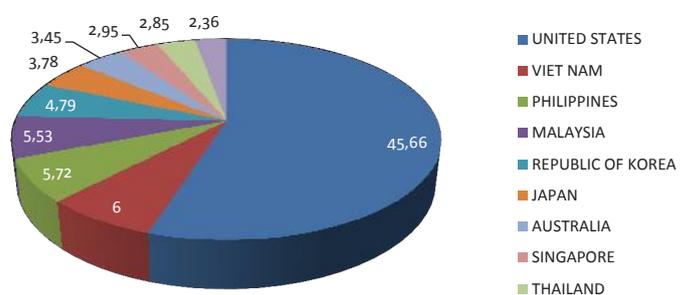
Aluminum industry consumes nearly 90% in bauxite mining, while the rest is used for abrasive products, cement, ceramics, metallurgical flux, refractory (heat resistant products), and miscellaneous products. Although Indonesia's bauxite potential is not too large for the world's size, but its natural source is still sufficient to meet national and regional demand. The national bauxite sources in Indonesia are located in Riau Islands, Bangka Belitung, West Kalimantan, South Sulawesi, Central Maluku and Papua.

In the global market, the demand of aluminum is predicted to keep growing until 2035, mainly in Asia and South America markets. Based on the forecast by CRU, the world market at least 54 Smelters with a capacity of 750,000 Tons per year. However, the challenge to obtain competitive energy is still remain the primary obstacle.

For Indonesia, aluminum is also one of potential export commodities. During 2016, the export performance of this product achieved USD 395,96 million. In a subsequence, from January to March 2017, the transaction was recorded at amount of USD 44,75 million. This value was higher than the value recorded in the same period of last year (January-March 2016), which only gained USD 16,45 million.

The top ten countries as Indonesia's aluminum export markets are the United States (USD 48,46 million), Viet Nam (USD 6,36 million), Philippines (USD 6,08 million), Malaysia (USD 5,87 million), Republic of Korea (USD 5,09 million), Japan (USD 4,01 million), Australia (USD 3,87 million), Singapore (USD 3,14 million), Thailand (USD 3,03 million), and Belgium (USD 2,50 million).

Indonesia's Aluminum Export Market Share (%)



Indonesia's aluminum products and derivatives that gained highest demand in the international market are Aluminum Non-alloyed Rectangular (including square) Plates, Sheets And Strip, Over 0.2 Mm Thick (HS 760611); Aluminum Alloy Bars, Rods And Profiles, Other Than Hollow Profiles (HS 760429); Aluminum Alloys, Unwrought (HS 760120); Aluminum Casks, Drums, Cans, Boxes And Similar Plain, Unfitted Containers, Of A Capacity Not Over 300 Liters, 79.30 Gal. (HS 761290); Table, Kitchen Or Other Household Articles, Parts Thereof, Of Aluminum (Excl. Pot Scourers And Scouring Or Polishing Pads, Gloves And The Like, Cans (HS 761519); Aluminum Alloy Tubes And Pipes (HS 760820); Aluminum Doors, Windows And Their Frames And Thresholds For Doors (HS 761010); Aluminum Wire Of Non-alloyed Aluminum, With A Maximum Cross Sectional Dimension Of Over 7 Mm (HS 760511); Aluminum Foil, Not Over 0.2 Mm Thick, Not Backed, Rolled But Not Further Worked (HS 760711); and Aluminum Waste And Scrap (HS 760200).

For aluminum foil in particular, the utilization in the society is quite large as the substitution of plastic materials for food packaging. Moreover, the price is relatively cheaper in comparison to tin foil. The aluminum foil also has other comparative characteristics such as light, strong or not easily torn, heat resistant, air-tight, and does not contain magnets so that can be separated from cans during recycling process.

Dampness to oxygen makes aluminum foil as an ideal packaging for export, because it often experiences corrosion constraints. It is also easy to form, even if it is easily creased. Aluminum foil is often used as an inner layer of containers to protect the product from damage, such as coating the inside of the juice box. Although it can withstand fat, its resistance to acids and bases is lacking, requiring additional layers of wax or other chemical layers.

MARKET REVIEW

Its resistance to solar heat makes aluminum foil widely used also in health materials. The resistance of aluminum foil to heat can reach a temperature of 550 degrees Celsius, so that medical devices can be sterilized by wrapping this material. Food packed in cans, sealed and sterilized by boiling them can be stored for long periods of time. In addition, aluminum has advantages over metals that are soft in pure form, hard as steel in solid, lightweight but strong, resistant to corrosion, non-toxic, also good heat and electrical conductor.

The increasing demand of aluminum also comes from the automotive industry and aerospace. Aluminum has been used to manufacture automobiles for well over a hundred years. The use of aluminum reduced the weight of the car bodies by up to 239 kg and paid great dividends in reducing fuel consumption. Today, aluminum is the second most used material in the auto industry next to steel. It is believed that one kilogram aluminum can replace up to two kg of steel or cast iron in the manufacturing process.

The second largest industry for aluminum is the building and construction market, where demands in developing countries are still very high - aluminum accounts for up to 30% of building materials here. The erratic nature of the building industry influences the price of aluminum, as construction growth raises the price and construction shrinkage reduces the price.

The most important factor in the aluminum industry is the availability of relatively cheap electrical energy sources. The cost structure of energy in the aluminum industry reached over 20%. Hence, aluminum is said to be a "canned electricity". Other costs in the aluminum industry that also have big portions are 1) alumina and freight, and 2) capital expenditure and corporate charge.

No	Components	Composition (%)
1.	Alumina & Freight	34
2.	Capex & Corporate Charge	24
3.	Power Cost	23
4.	Carbon Cost	9
5.	Labor Cost	2
6.	Other Costs & Net Realization	8
Total Cost		100

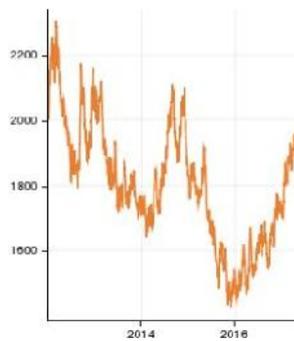
It should be bear in mind that the power cost or energy which is the third the largest cost component, also guarantees the stability of market supply. It is also the critical factor to determine the continuity of plant operational. Thus, the strategy implemented by the smelters is by building their power plants as a Dedicated Power Plants, where plants are located near to the energy sources.

The magnitude of the energy cost depends on the source of the driving force used, such as hydropower, power plant, diesel, steam power plant or others. Currently, the world aluminum industry is divided into two clusters based on its energy source. The first one is the countries which use cheap energy like hydro and gas, with cost range 0.5 ~ 2.0 Cent \$ / kWh. The second one is the countries where more expensive sources, like coal with the price above 30Cen \$ / kWh, are mainly used. In Indonesia, the potential of relatively cheap electric energy resources of hydropower is quite available, and is namely as Pembangkit Listrik Tenaga Air (PLTA).

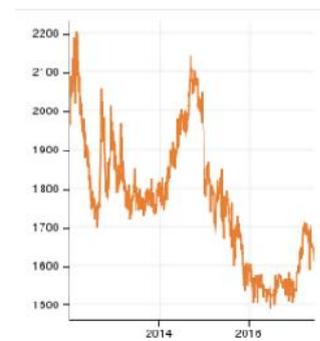
As other commodities, the production cost will eventually influence the price of aluminum products in the market. Since 1978, primary aluminum has been traded through London Metal Exchange. However, in recent years, Shanghai Futures Exchange (SHFE) has also become the benchmark as the standardized price in China, as the biggest aluminum consumer in the world.

LME Aluminum Prices

Aluminum Prices



Aluminum Alloy Prices



Source: Quandl





Due to the global consumption and production of these materials, prices for the raw materials are extremely susceptible to changes in economies and exchange rates. Recessions, the rapid growth of China's economy and the gradual fall of the dollar are all factors that cause the price of aluminum to fluctuate over time.

For such a global commodity, it comes as no surprise that the price of aluminum is as variable as the places it is manufactured and sold. Prices are more stable in developed economies, yet as long as it is used in the giant industries of global transport and construction, its price will be inevitably tied to current market fluctuations.

Despite aluminum relying on such variable markets, prices for this material are at an all time high. Production stocks are the lowest they have been in decades, and intense construction activity in countries like India and China have raised the demand for aluminum considerably. This trend is also apparent for other metals such as copper, zinc and lead.

1. ALAKASA EXTRUSINDO

Jl. Pulo Gadung No. 4, Kawasan Industri Pulogadung, Jakarta Timur - 13920

Products:

Aluminium Products.

2. ALFO CITRA ABADI

Jl. Mesjid Raya No. 14, Medan - 20151

Products:

Aluminium Foil; Aluminium Products.

3. ALUMINAMETAL UTAMA

Menara Batavia 26th Floor, Jl. K. H. Mas Mansyur Kav. 126, Jakarta - 10220

Products:

Imitation Gold Or Silver Wire Of Aluminium, Alloyed Exceeds 7 MM; Aluminium Bars, Rods and Profiles.

4. ALUMINDO LIGHT METAL INDUSTRY, Tbk.

Jl. Kembang Jepun No. 38-40, Surabaya - 60162

Products:

Aluminium Foil; Aluminium Plates, Sheets and Strip; Aluminium Foil Backed Embosed Surface Treated Imitation Gold or Silver.

5. CAKRA COMPACT ALUMINIUM

Jl. Raya Medan - Tg. Morawa Km. 11,5 (Po Box. 2345), Deli Serdang - 20148

Products:

Aluminium Tubes and Pipes; Aluminium Tube or Pipe Fittings.

6. EXTRUPACK

Jl. Raya Bekasi Km. 28,5, Kalibaru, Bekasi Barat - 17133

Products:

Aluminium Tubes and Pipes.

7. GOLGON

Jl. Sutomo No. 201, 203, 205, Medan - 20212

Products:

Cloth, Grill Netting & Fencing of Aluminium Wire.

8. INDAL ALUMINIUM INDUSTRY, Tbk.

Maspion Office Building, Jl. Kembang Jepun No. 38 - 40, Surabaya - 60162

Products:

Aluminium Products; Doors, Windows & Their Frames Thresholds for Doors of Aluminium.

9. INDONESIA ASAHAN ALUMINIUM

Summitas I, 15th Floor Jl. Jenderal Sudirman Kav. 61-62 (P.O. BOX 6917), Jakarta Selatan - 12069

Products:

Aluminium Products.

10. SUMATERA ENAMEL ALUMINIUM FACTORY, CO.

Jl. Medan - Binjai KM. 13, Desa Fujimulyo Gg. Horas, Medan - 20127

Products:

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