



REPUBLIC OF INDONESIA

# INDUSTRY

FACTS & FIGURES

MINISTRY OF INDUSTRY REPUBLIC OF INDONESIA

2011

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2011



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## FACTS & FIGURES

MINISTRY OF INDUSTRY REPUBLIC OF INDONESIA  
2011



MINISTER OF INDUSTRY  
REPUBLIC OF INDONESIA

Following global economic turbulence, Indonesia's economic outlook is showing a positive trends, the growth reached 6,1% in 2010 and projected rise to 6.0-6.5% in 2011 and expected to gradually return to the trend growth rates approaching 7.0 percent thereafter, which is supported by global economic recovery, export growth development as well as investment acceleration.

Well maintained macroeconomic fundamentals supported by conducive political situation are expected to sustain further national industry development . The growth of industrial sector during 2010 is better than previous years, this is demonstrated by the growth of non-oil manufacturing industries during 2010 which is grew above 5%, namely 5.1%. The figures is not only much higher than the growth in 2009 that only 2.6%, but also exceeded the government's growth target of 4.65%.

As well as growth of export manufacturing sector as a whole which reached 33.47% during 2010. This figures is not only higher than the growth of industrial sector in 2009, which dropped by 16.93%, but higher than export growth of industrial sector in 2008 which was only 15.15%. With export value of USD 98.01 billion during period of January-December 2010, the export value of manufacturing sector in 2010 is the highest export value that ever achieved by Indonesia.

To achieve a strong national industry and to improve the competitiveness of national industries, within the next five years the Ministry of Industry will focus on industrial competitiveness enhancement program according to groups of industry, namely: (1) Labor Intensive Industries (textile and textile product, footwear and furniture industry); (2) Small and Medium Industries (fashion, handicrafts, precious stones, ceramics and essential oils industry); (3) Capital Goods Industries (machinery and shipping industry); (4) Natural Resource-Based Industry (palm oil, cocoa, rubber, seaweed, steel and aluminum upstream industry); (5) High Growth Industry (automotive, electronics, and telematics industry); (6) Special Priority Industries (sugar, fertilizer and petrochemical industry). The development of priority industries are expected to increase the contribution of industrial sector on the national economy.

The publication of 'Industry Facts & Figures' in 2011 is expected to provide information about the prospects, development and economic progress of Indonesia as well as investment opportunities in the industrial sector, which is supported by a conducive business climate and availability of raw materials and infrastructures which is improving gradually, so that Indonesia can be a prospective investment destination.

**Minister of Industry**

**Mohamad S Hidayat**



Indonesia is one of the largest archipelagos in the world that has 17,508 islands, situated between 6 degrees northern latitude and 11 degrees southern latitude and spreading from 97 degrees to 141 degrees eastern longitude and it is located between two continents – Asia and Australia/Oceania. This strategic position greatly influences the country's culture, social, politics and economy.



INDONESIA

# at a glance



**S**tretching along 3,977 miles between the Indian Ocean and the Pacific Ocean, Indonesia has a total area of 1.9 million square miles including the ocean waters.

The five large islands of Indonesia are: Sumatra covering 473.606 square km, Java with 132.107 square km, Kalimantan (the third largest island in the world) with an area of 539.460 square km, Sulawesi with 189.216 square km, and Papua with an area of 421.981 square km.



The 300 ethnic groups that exist harmoniously give birth to a potpourri of cultures and fascinating people. The major ethnic groups are: Minangkabau, Malay, Javanese, Sundanese, Maduranese and Ambonese. Arab, Chinese and Indian immigrants have also settled in regions throughout the country, particularly in the coastal cities.

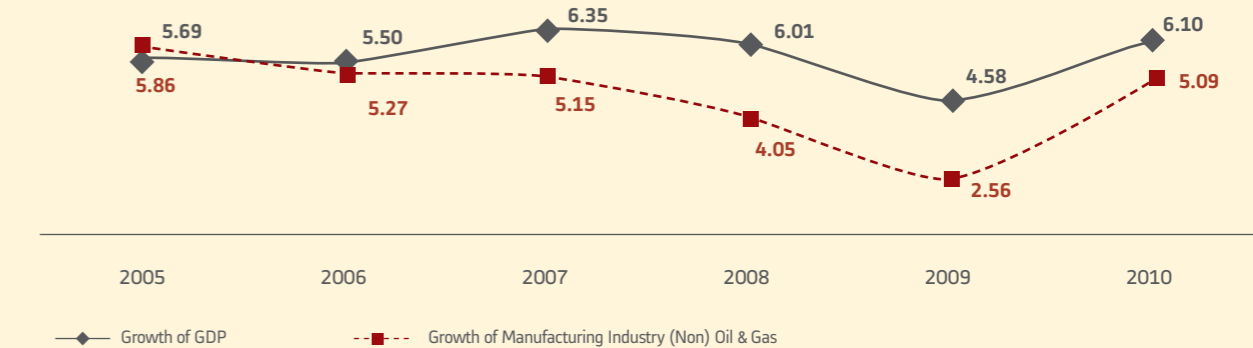
The lowland that comprise most of Indonesia has a characteristically tropical climate with abundant rainfall, high-temperatures and humidity. Rainy Indonesia's tropical climate and unique geographical character provide shelter for flora and fauna. The plant and animals in Indonesia's western region represent that of mainland Asia while those in the eastern region are typical of Australia. Endemic species, which are the pride of Indonesia exist in the central

region, such as orangutans, tigers, one-horned rhinos, elephants, dugongs, anoas and komodo dragons. The warm tropical waters of the archipelago nurture a rich marine environment that holds a myriad of fish, coral species and marine mammals.

A cultural heritage passed on through generations offers a wealth of traditional arts and crafts. Batik, wooden carvings, weavings, silverworks and many other traditional skills produce exquisitely beautiful items. Indonesia's multi-racial and multi-religious culture mean festivals steeped in traditions are celebrated throughout the year. Frequently featured in these events are dances, wayang theaters and other performing arts.

# Main Economic Indicators

## GROWTH OF GROSS DOMESTIC PRODUCT & MANUFACTURING INDUSTRY (Non-Oil & Gas)



No	ECONOMIC INDICATORS	2005	2006	2007	2008	2009	2010
1	Economic Growth (%)	5.7	5.5	6.3	6.2	4.5	6.1
	- Non Oil and Gas	6.6	6.1	6.9	6.8	4.9	6.6
2	Inflation (%)	17.1	6.6	6.7	11.1	2.78	6.96
3	SBI Rate (3 month)	12.75	9.75	8.0	9.3	6.55	6.55
4	Exchange Rate (Rp/US\$)	9,713.0	9,050.0	9,130.0	9,691.0	9,400.0	8,991.0
5	Unemployment Rate (%)	11.2	10.3	9.1	8.3	8.4	7.14
6	Poverty Rate (%)	16.0	17.8	16.6	15.4	14.15	13.13

Source:

Coordinating Ministry for Economic Affairs Republic of Indonesia; Central Bureau of Statistics

GDP (2007) : \$433 billion; (2008): \$511 billion;(2009) : \$561 billion; (2010) \$700 billion

Per capita income (2007): US\$1,942; (2008) :US\$2,271 ;(2009) :US\$2,590.1; (2010): US\$ 2.963

Natural resources (11.2% of GDP): Oil and gas, bauxite, silver, tin, copper, gold, coal.

Agriculture (15.3% of GDP): Products--timber, rubber, rice, palm oil, coffee. Land--17% cultivated.

Manufacturing (24.8% of GDP): Textiles and Textile Product, footwear, electronic goods, furniture, paper products.

### Trade:

**Exports(2010)**—US\$ 157.732,6 billion including oil, natural gas, crude palm oil, coal, appliances, textiles, and rubber. Major export partners—Japan, U.S., Singapore, China, Republic of Korea, India and Malaysia.

**Imports(2010)**—US\$ 135.606,1 billion including oil and fuel, food, chemicals, capital goods, consumer goods, iron and steel. Major import partners—Singapore, China and Japan.

Source:

Coordinating Ministry for Economic Affairs Republic of Indonesia; Central Bureau of Statistics

## 2

The government of Indonesia is striving toward implementing a new development paradigm to fulfill the future demands and challenges of global competition. The virtue of sustainability, good governance, accountability, transparency, democracy and participation would be the merit of the development process.

Under the administration of The 2nd United Indonesia Cabinet (Kabinet Indonesia Bersatu) aspire to a good economy, a good society, and good political process, the national economic objective have been set to achieve a higher the level of GNP per capita; improved international

competitiveness; a high level of employment; stable price level; good health; good education; a good environment; security and peace; human freedom; and so forth.

The government of Indonesia has set the following three aims to be met in Indonesia's Medium-Term Development Agenda 2010-2014:

**Welfare.** Achieving people's welfare through economic development .

**Democracy.** Achieving democratic community with respect on responsible freedom and human rights.

**Justice.** Achieving a just and equitable development.

The mission is the formulation of the 2010-2014 development efforts necessary to achieve the vision of Indonesia in 2014, namely the establishment of Indonesian Prosperous, Democratic and Justice, but can not be separated from the conditions and challenges of global and domestic environment in influencing the period 2010-2014.

# The Strategic National Agenda



Today, Indonesia has emerged as a very different country compared with a decade ago. It has embarked upon a far-reaching institutional transformation and has become one of the region's most vibrant democracies.

# A Better Shape of Indonesia





The first stage of this transformation, from 1998 to 2003, was a period of political and economic change, characterized by democratization and decentralization of government. Indonesia's almost 500 provincial, district and city governments now undertake nearly 40 percent of public spending. Despite obstacles it brought, decentralization contributed to the consoling of regional conflicts and promotes political stability as well as offers an emerging more vibrant spatial geographic distribution of economic development throughout the country.

The second stage, from 2004 was a period of democratic institutions consolidation as well the return to a political and macroeconomic stability, most notable in Indonesia's first direct presidential elections and in its debt levels falling to below 35% of GDP<sup>1</sup>

Among others, the government has taken steps to address different aspects of the investment climate through policy reform packages covering key areas of concern of private investors, such as taxes, customs, investment frameworks, and the financial sector.

On the institutional transformation, the government is working to set up the institutional framework, coordinating mechanisms and enhancing governance. On the provincial side, a number of sub-national governments have undertaken major reforms of their public sector systems, introducing among others performance-based budgeting and one-stop public services.

The legal arrangement is also directed to improve investment climate, both directly by promulgating Investment Law No. 25 of 2007 and indirectly by imposing open capital account through promulgating Law No. 24 of 1999. The later is set up to improve the financial infrastructure to support capital inflows, both for direct investment and portfolios.

<sup>1</sup> World Bank, Investing in Indonesia's Institutions for Inclusive and Sustainable Development, 2008





## 4

To enhance macroeconomic stability, the government and the monetary authority work hand in hand and are committed to enhance fiscal and monetary discipline as well as strengthening the financial architectures



# Indonesia Macro Economic Stability





Learning from the failure of 1997-1998 crises, the policies were focused on enhancing policy transmission, improving financial market efficiency through prudential practices and financial market deepening. To this point forward, the government was improving their capacity on fiscal budgeting, to be more specific, the adoption of active debt and cash management. They also fully committed to improve fiscal sustainability by reducing debt to GDP ratio.

Steps were also taken in the area of monetary policy framework. Since 1999, Bank Indonesia was mandated to achieve a single objective of price stability, both in terms of inflation and the exchange rate and at the same time was given independency on policy conduct.

In 2005, Bank Indonesia fully adopted the Inflation Targeting Framework marked by the introduction of BI Rate as the policy rate to increase policy effectiveness in achieving the inflation target set by the government. In 2008, further enhancement has been done in the area of monetary policy implementation by the introduction of overnight interbank rate as operational target to improve the effectiveness of the monetary policy.

Institutional reform in the financial sector has been done by improving the soundness and efficiency of the financial market through the combination of imposing prudential practices and enhancing market deepening. Financial sector reforms are crucial in raising Indonesia's growth rate and enhancing the economy's resilience.

In banking industry, reform is conducted by the strengthening of banks' capital, introducing risk management practices and governance, and not to mention improving supervisory capabilities. These were done by adopting Basel core principles and promoting mergers and acquisitions. The same reforms were conducted in the capital market, debt market, as well as non-bank financial institution. One of the most important breakthroughs can be observed in the development of the debt market following the issuance of marketable government bond in 2002, which is not only useful to deepen the financial market but also significantly reduced the need for foreign financing and thus increase the economic resiliency.

Strong commitment to reforms has yielded a progressive and more resilient fundamental performance, especially in the last five years. Indonesia resumed higher levels of

growth and has reemerged as a confident middle-income country as well as increasing regional and global standing as the world's strongest economic performers close to those of India and China. Indonesia's economic growth accelerated to a 10-year high and proven to be robust during the wake of the 2008-2009 global economic crisis. Real GDP has been growing at 5 to 6% annually since 2002 and, in 2009 per-capita real GDP exceeded the level reached in 1997, immediately prior to the Asian crisis. The legacy of Government's prudent fiscal management and a strategy of fiscal consolidation have contributed to the significant reduction in government debt levels, which are estimated to fall to 31.5% by end-2009. Investment share to GDP is improving though is still below pre-crisis levels. In 2009, Indonesia's was 23% of GDP, or significantly improves from 19 percent of GDP in 2002 signaling a structural improvement on the business climate.

Increasing efficiency on the institutional framework as well as strong fiscal and monetary discipline were also able to reduce inflation markedly and so did the exchange rate. In the financial sector, the banking sector, which account for about 80% of the financial industry's assets, is in sound shape and is relatively unexposed to developments in

troubled financial markets elsewhere. Indonesia has a well-developed and well-regulated banking sector and has made major advances over the past five years in establishing a sound legal and administrative framework for the modernization of public financial management in line with good international practice.

On April 2nd, 2010, OECD upgrades Country Risk Classification (CRC) ranks of Indonesia from the previous level of 5 to 4. Indonesia was the only country of the 161 countries, given the CRC upgrade in the latest OECD committee meeting session on April 2010. The main factor supporting the upgrades is Indonesian impressive macroeconomic indicators as the economy is one of the most resilient amid the global financial crises and Indonesia is one of the few countries that experienced positive economic growth in 2009. Improvement in macroeconomic performance and economic stability is the result of a combination of good and forward looking economic policy, ongoing structural reforms, as well as good debt management. Prior to this upgrade, on March 12, 2010, Standard and Poor's also upgraded Indonesia longterm foreign currency rating to BB (from BB-) and long-term local currency rating stays at BB+. Outlook for both are



'positive'. The upgrade was also observe in the rank of global competitiveness as publicized by the World Economic Forum. On the 2009-2010 Global Competitiveness Index, Indonesia rank was increasing to 54 from previously 72 in 2003. The upgrade would certainly put Indonesia in a better position before its creditors in negotiating, particularly export credit creditors.

During the 2008-2009 worldwide contraction, Indonesian economy still enjoyed a positive growth of 6.0% in 2008 and 4.5% in 2009 and held by high and inclusive growth of domestic demand, particularly consumption. Indonesia is less exposed to external shocks than other economies in the region as its trade share to GDP is relatively small at about 50 percent of GDP. Inflation is moderated and achieved year-on-year increases of only 3.4% in March 2010 held by adequate supply responses and rupiah exchange rate appreciation. As a result, the unemployment rate fell back from 11% in 2005 to 7.9% in 2009. This development supports the fall of the poverty rate that has fallen by about one percentage point per year since 2003 and reached 15 percent in 2009. On the external balance, balance of payments is strong and achieved a current account surplus of US\$ 10.5 billion and capital account surplus of US\$ 2.3 billion in 2009.

This has contributed to a sizeable accumulation of official

international reserves, which to date approached US\$ 71.8 billion in March 2010, providing Indonesia with a cushion against external shocks. Strong fundamentals have been proven as the key cushion to the adverse impact of global economic downturn and quickly revive market risk appetite toward Indonesian asset classes. The exchange rate has been appreciated about 24% at Rp 9090 per US\$ by the end of March 2010 from its weakest level of Rp12,020 per US\$ in February 2009 on the back of net foreign capital inflows. Constraint on liquidity following the recent global credit squeezing has been recovered as the counterparty risk revived quickly and the market spreads narrowed.

Indonesia's economic outlook is favorable. The Growth reached the upper level of 6.1% and projected rise to 6.0-6.5% in 2011 and is expected to gradually return to the trend growth rates approaching 7.0 percent thereafter, on the back of the upturns in export growth following ongoing global economic recovery as well as investment acceleration. Investment is expected to grow 9% in 2010 and rise even faster by 11% in 2011 on the back of higher public capital spending on infrastructure that drives better private investment and lower risk premium. On the fiscal side, Indonesia has been able, through prudent fiscal policy, to bring its public debt to GDP ratio lower. Projections indicate that this trend is likely to continue.



Inflation will continue to moderate and is likely to be at the lower end of its target range of 5%±1% in 2011 as the output gap is still wide enough to respond to the acceleration in demand side and supported by stable rupiah exchange rate.

In the medium term, inflation is expected to converge to its regional average of 3.5-4.0%. On the external side, current account and capital account is expected to continue in surplus of US\$ 5 billion and US\$ 8 billion consecutively, support the continuingly surplus balance of payments and drive to higher international reserve. Favorable development on the fundamental sides along with ample market liquidity will maintain stability on the financial market especially in banking industry i.e credit will grow of 17-20% in 2010, along with high CAR around 19% and subdued NPLs below 5%.

Well maintained macroeconomic fundamentals, strengthening external liquidity position, gradually declining government debt ratio, supported by prudent fiscal policy and smooth implementation of structural reforms, is expected to sustain higher economic growth in the coming years to keep the positive momentum for further rating improvement.

Despite these achievements, new challenges are waiting

and hence much progress is still needed. The main constraint for Indonesia's economic development is to translate the available resources into better outcomes. Delivering better development outcomes now depends largely on improving government effectiveness through strengthening accountability and capacity at all levels, as well as ensuring that much of the future growth is driven by the private sector development. There are much to be done in the area of resource allocation, incentives system, and transparency.

Investment rates are improving, but are still below pre-crisis levels. The government has taken steps to address different aspects of the investment climate through policy reform packages but several challenges remain. Institutional capture is a major obstacle in this area, with many reforms still to be implemented effectively and evenly on the ground. Improving the quality of Indonesia's infrastructure is another essential aspect of strengthening Indonesia's competitiveness and we are still working on it with full commitment. As far as recent development and prospect of the economy, challenge emerge as the global recovery process makes is still highly uncertain and will determine the degree to which Indonesia's growth accelerates in 2010 and beyond.

# 5



Industry  
**a bold.**  
vision



## Vision and Mission

The long-term vision of national industry development is Indonesia to become “a strong industrial nation in the world”, with a linking vision:

“In the year 2020 Indonesia shall become a New Industrial Developed Country”. It means in that year the national industry capability is recognized by the international community as the structural basis for the future’s strong modern economy as well as a vehicle for a people-oriented economy.”

To realize this vision, the industry sector must carry its missions, as follows:

- To become the medium to fulfill the people’s living needs;
- To become the dynamist for the national economic development;
- To become the multiplier to productive business activities in the real sector for the people;
- To become the medium to improve national technology capability;
- To become the medium to drive modernization of livelihood and cultural perception of the people;
- To become one of the important supporting pillars for the country’s defense and for the establishment of the people’s security;
- To become the mainstay for the continuous industry development through development and management of renewable raw materials.

To execute them, the missions of the agency in charge of developing industry are:

- To become the people’s motivator in conducting production business activities in the manufacture industry, which inherit a high economic value with high competitiveness and making the most out of national basic sources;
- To prioritize the marketing of domestic primary products (products classified as industrial raw materials) to fulfill the demand on raw materials for the domestic manufacture industries so that they can generate more added values and create new jobs;
- To become the mainstay for the continuous industry development through optimum development and management of natural resources and exploitation of renewable raw materials to ensure a self-sustained future generation.

## Objectives

The objectives of the industry sector development in the long-term development are as follows:

1. A strong industry with sustainable competitiveness to become world-class industry, supported by strong basis of science and technology, including nanotechnology, ICT and biotechnology;
2. A strong manufacture industry structure, including a firm cooperation network between small and medium industries (IKM) and large industries;
3. A balanced contribution from IKM and large industries to the Gross Domestic Production (GDP);
4. Well-distributed industries in all parts of Indonesia based on the potential and support capabilities of each region.

The targeted industrial growth target in the period of 2010 – 2025 is estimated above 10% per year, where in this rate the industry’s role towards Indonesia’s GDP could increase significantly.

## Policy Direction

The policy is directed to answer the globalization challenges of the world economy and to anticipate drastic developments changes of the environment. International competitiveness is a new perspective to all countries in the world, and so the focus of future industry development strategy is to develop sustainable competitiveness of the manufacture industry in the international market.

Optimizing all efforts to exploit the country’s resource potentials and the capability to exploit every opportunity on hand, from inside and outside, must be done to develop a sustainable competitiveness. The essence of a sustainable competitiveness lies on the efforts to drive and organize all productive resource potentials to produce cheaper, better, and easier to find innovative products in fulfilling the market’s demands and needs.

The future manufacture industry development strategy takes into account the current and ongoing thoughts – to develop industries by adopting cluster approach to achieve collective competitiveness of industries.

Proper and feasible cluster formats are sought for by the present entrepreneurs to adopt the industrial development concept. Emphasis is put on establishing network to maximize collective competitiveness. This group approach is taken as a complement to individual approach to encourage



indigenous innovation of products and technology. However, this does not overlook the importance of beneficial global cooperation without having to sacrifice national interest. Future industries are industries with high competitiveness, based on not only to Indonesia’s large potentials (vast area, large population number and natural resources availability), but also on capability or creativity, skills and human resource professionalism.

Based on the process above, it is hoped the industry structure will become national economy’s main driver and the backbone of the future national economic resilience, making the economy more competitive and strong in the international market.

Future industries including: (a) agro-based industry; (b) transportation industry; (c) information technology and telecommunication equipment industry; are the ones to be first developed. This industrial group is considered more sustainable because it relies on knowledge and skilled-labor, renewable natural resources and technological mastery. Future industrial development would need support from related sectors in terms of:

- a) developing a comfortable and conducive business environment and development of innovation capability;

- b) strengthening the linkage between all levels of value of related industry cluster;

- c) increasing resource capabilities used in the industry to develop the main competence;

- d) determining the industry distribution priority; and
- e) developing small and medium industries (IKMs).

To deal with the increasingly tight competition in the international market, the long-term focus of development shall be directed towards increasing research capability and development and increasing the skill and expertise of human resources for innovation in processes and products. The implementation is done in synergy and integration with the development of other economic sectors such as agriculture, energy, mineral resources, forestry, maritime, education, research and technology, and trade. Also important is the synergy between all businessmen and all regions in Indonesia. The support of other sectors, including determining the task and function of industry development in sectorial and spatial manners between central and regional, will determine the success or the failure of industry sector development in the future.

# 6

The growth of industrial sector during 2010 is better than previous years, this is demonstrated by the growth of non-oil manufacturing industries during 2010 which grew 5.1%.



# The Rise of **National** Industry



The growth of manufacturing industry non-oil and gas amounted 5.1% in 2010 showed a significant increase compared to same period in 2009 which is only reached 2.6 percent. The highest increases are a group of transportation and parts amounted to 10.35 percent ; fertilizer, chemical and rubber industry grew by 4.67 percent, and other goods industries by 2.98 percent.

while the contributions of manufacturing industry non-oil and gas to national GDP in 2010 was 21, 55%, slightly down compared to 2009 which was 22, 57%. The groups of industry became the largest contributor to the growth of national GDP are food, water and tobacco, 33.60 percent; transportation and parts, 28.14 percent; fertilizer, chemical and rubber industry, 12.73 per cent; textiles, leather and footwear industry, 8.97 percent; and wood products and forestry industry, 5.82 percent.

As well as growth of export of manufacturing industry which reached 33.47% during 2010, this figures is not only higher than the growth of industrial sector in 2009, which dropped by 16.93%, but higher than export growth of industrial sector in 2008 which is only 15.15%. With export value of USD 98.01 billion during period of January-December 2010, the export value of manufacturing sector in 2010 is the highest export value that ever achieved by Indonesia.

This figures illustrates that the manufacturing sector has been relatively not only a source of high growth of overall GDP growth but as pillars of Indonesian economy as a whole. The efforts made by the government in earlier years followed by solid macro economic condition and regional economic development is expected to encourage the growth

of manufacturing sector in 2011 which targeted at 5,2 to 6,1 percent

To reach the targeted of growth in 2011, the manufacturing sector is projected needs an investment amount to 124.6 trillion rupiah with cumulative employment 14,905,019 people. While exports of manufacturing industry for 2011 is projected at USD 92.26 billion

To achieve a strong national industry, the government has made various industrial revitalization as stated in the Republic of Indonesia Presidential Decree No.28 Year 2008 on the National Industrial Policy.

The Industrial policy provides direction for industry players who have business activities in the industrial sector as well as the operational guidelines for government officials in implementing industry development program, in order both medium-term and long-term industrial development will be more focused and binding on all the elements of stakeholders.

As a consequence of the publication of such regulation, the Ministry of Industry has set the Mapping Guidelines of 35 Clusters Priority Industry and Road Map of Core Competence Industrial Development on 18 Provinces and 5 District.

In accordance with Presidential Instruction No. 1 Year 2010 on the Acceleration of the Implementation of National Development Priorities in 2010, the Ministry of Industry assigned to revitalise Fertilizer Industry, Sugar Industry, Agro Oleo-Chemical Based Industry, Oil and Gas Condensate Based Industry and Facilitation of Special Economic Zones Development.

# 6

# Priority Industry

To improve the competitiveness of national industries, the Ministry of Industry will focus on industrial competitiveness enhancement program gradually according to groups of industry.

Year 2010-2014 the Ministry of Industry, focuses on six industry groups that have good opportunities to be developed are: (1) Labor Intensive Industries, (2) Small and Medium Industries, (3) Capital Goods Industries, (4) Natural Resource-Based Industry, (5) High Growth Industry, and (6) Special Priority Industries.

To encourage increased competitiveness of national industries, the government will use 4 supporting instruments namely the state budget, fiscal incentives, provision of industrial estates infrastructure, and administrative support, as well as inviting private sector role in the development with Public Private Partnership (PPP) scheme.



# The Development Plan of **Six Economic Corridors**

In order to encourage the acceleration of economic transformation in Indonesia, currently the Coordinating Ministry for Economic Affairs, together with the Ministry in the field of economic affairs are putting together a master plan on “Acceleration and Expansion of Indonesia Economic Development” with the goal of high economic growth, inclusive and sustainable.



# MAPPING OF THE SIX ECONOMIC CORRIDORS



In order to encourage the acceleration of economic transformation in Indonesia, currently the Coordinating Ministry for Economic Affairs, together with the Ministry in the field of economic affairs are putting together a master plan on “Acceleration and Expansion of Indonesia Economic Development” with the goal of high economic growth, inclusive and sustainable.

To achieve the target goal, currently has been set six priorities of economic corridors as the center of growth in the region by developing industrial cluster seed resource-based (commodity and / or sector).

**(1) Sumatra Economic Corridor** will be a centre production and processing of crops and granaries of national energy. Industries that will be developed are:

- Downstream Industry of palm oil and rubber in Sei Mangkei, North Sumatra and Dumai, Riau.
- Downstream Industry of rubber in Jambi.

- Shipping Industry in Karimun, Riau Islands.
- Downstream Industry of rubber and coal in Tanjung Api-Api and Muara Enim, South Sumatra.
- Petrochemical Industry in Banten.

**(2) Java Economic Corridor** will be a driver of industrial and national services. Industries that will be developed include:

- Textile Industry in Majalengka, West Java and Semarang, Central Java
- Automotive and Machinery Industry in Jakarta – Cikampek
- Food and Beverage Industry in Jakarta, West Java, Central Java and East Java.
- Industrial Electronics and Telematics in Jakarta - Bandung, Solo, Salatiga (Central Java), Surabaya, East Java.
- Shipping Industry in Lamongan, East Java

- Petrochemical Industry in Tuban, East Java
- Steel Industry in Banten Province
- The Cement Industry in the province of Banten, Central Java and East Java

**(3) Kalimantan Economic Corridor** will be centre of mining processing and national energy barn. Industries that will be developed include:

- Steel Industry in Batu Licin, Southern Kalimantan
- Aluminum Upstream Industry in Mempawah, West Kalimantan.
- Downstream of Palm Oil Industry in Maloy, East Kalimantan
- Oil and Gas and Condensate Based industry in Bontang, East Kalimantan.
- Coal Industry in Palangkaraya, Central Kalimantan.

**(4) Sulawesi Economic Corridor** will be the center of production and processing of agricultural, horticultural, fisheries, oil and gas, mining.

Industries that will be developed include:

- Nickel Industry in Soroako (South Sulawesi), Kolaka (Southeast Sulawesi) and Halmahera (North Maluku).
- Fisheries Industry in Makassar.

**(5) Bali - Nusa Tenggara Economic Corridor** will become the gateway of tourism and support the national food.

Industries that will be developed include:

- Tourism Industry in Bali, NTB.
- Fisheries Industry in Lombok (NTB) and Kupang (NTT).

**(6) Papua-Maluku Economic Corridor** will be a processing the abundant natural resources and a center development of food, fisheries, energy and mining.

Industries that will be developed include:

- Petrochemical of Oil and Gas Condensate based industry based in Tangguh, Papua.
- Copper Industry in Timika, Papua.

# INFRASTRUCTURE ON DEMAND

Infrastructure and energy are two of the 11 priorities in Indonesia's Second Five-Year Development plan for 2010 to 2014. Indonesia expects its economy to grow at an average of seven percent annually in this four-year period.





Infrastructure development in Indonesia requires substantial capital. For the next five years, estimated funding requirement amounts to Rp 1.429 trillion of which approximately Rp 511 trillion would be sourced from state budget and the rest from private participation, state-owned companies and regional governments. About Rp 407 trillion of total Rp 918 trillion expected from non-state budget is estimated to be coming from private sector through the PPP scheme.

Acknowledging the need for significant private sector participation, the government is preparing a comprehensive framework for the overall process from project preparation, land acquisition, project funding and guarantee provision with regards to political risks. Some key institutions have been established including Land Fund (land capping and revolving fund), Infrastructure Fund and Guarantee Fund.<sup>3</sup>

### The Challenge

Government budget limitation is one of challenges in infrastructure provision; According to Bappenas, it is estimated that the government is only able to provide Rp510 trillion (36 per cent of the total investment requirement) over the next five years. Government has been encouraging private sector participation through public private partnership (PPP) in infrastructure provision, which is economically and financially viable. Lack of institutional capacity in developing PPP projects is a challenge. Another challenge is the low interest of domestic capital resources to finance infrastructure projects.

<sup>3</sup> BAPPENAS (National Development Planning Board)

Indonesia is looking for Rp920 trillion private sector investment in infrastructure. These funds would be channeled to several institutions that support the streamlined PPP process. Government is now in the process of finalising an integrated government support scheme consisting of the Land Fund, Guarantee Fund and Infrastructure Investment Fund.

Government has invited investor participation in designing, financing and operating in many areas of infrastructure projects. Significant efforts have been done to attract private sector participation, such as:

- Provision of government support in Anggaran Pendapatan dan Belanja Negara (APBN) (the Indonesian State Budget): 44.3 per cent of infrastructure financing is under PPP schemes (Rp407 trillion out of Rp918 trillion); 30 per cent of Rp407 trillion (Rp122 trillion) committed for government support.
- Encouraging PPP Book implementation. Institutional strengthening: P3CU (PPP Central Unit) and PPP Nodes; PPP process streamlining. PDF (Project Development Facility) revolving fund development.
- Utilisation of Infrastructure Fund, Guarantee Fund, Land Revolving and Land Capping Fund.

Infrastructure sectors that will be provided for in the short to medium term in Indonesia are: roads and bridges, water supply, solid waste, air transportation, marine transportation, land transportation, railways, telecommunications, power, oil and gas. Government budget and private investors will

fund development of infrastructure services. Infrastructure projects that are able to exercise full cost recovery will be developed through public private partnerships (PPP) schemes, while others will be funded by the Government budget. As the Government could efficiently spend the budget for infrastructure, more funds can be allocated for social infrastructure, such as education and health. However, there has been lots of discussion to exercise PPP schemes in the social infrastructure arena too.

Central Java Independent Power Producer (IPP) is one example of a PPP project implemented under the new regulatory PPP framework (Presidential Regulation Number 67/2005 and Presidential Regulation Number 13/2010). The project is offering a Build Own Operate (BOO)/Build Operate Transfer (BOT) scheme. Investors are invited for financing, designing, constructing, operating and maintaining the project. The project will consist of a coal-fired power plant and associated facilities. The plant size is expected to be up to 2,000 MW. The project forms part of the Power Development Plan Electric Power Supply Business Plan (RUPTL) for the period 2009-2018.

The PPP Book contains PPP infrastructure projects that are regulated by Presidential Regulations No.67/2005 and No.13/2010 regarding Public Private Partnerships on infrastructure provision. The PPP infrastructure projects in this book are divided into three categories: potential project, priority project and project ready for offer.

Potential projects are projects planned by government but still need pre-feasibility documentation and risk analysis completed, while priority projects are projects that already have pre-feasibility studies, PPP modality, risk analysis and government support (if necessary). PPP ready projects are PPP projects that already have tender documentation, market sounding reports, PPP procurement schedules, and government support (if necessary).

PPP infrastructure projects that have or will be offered soon are an IPP for Central Java (2,000 Megawatt); Airport Sukarno-Hatta - Manggarai Railway; Puruk Cahu - Bangkuang Railway (Central Kalimantan); Tanah Ampo Cruise Terminal (Bali); Waste to Energy Gedebage (West Java); and Umbulan Spring Water Supply project.

The government, with support from the Asia Development Bank (ADB), has been implementing the Infrastructure Reform Sector Development Project (IRSDP) to assist the line ministries and local government to prepare PPP projects in infrastructure development.

The government is aware that such large-scale Private Sector Participation (PSP) - preferably through PPPs - cannot be taken for granted, unless serious structural and institutional reforms are implemented. Broad-ranging policy reforms are critical to improve the investment climate, including:

- liberalising markets to allow competition and entry by new service providers



- improving legal and regulatory certainty and strengthening regulatory arrangements
- introducing tariff regimes based on full cost recovery or providing compensation to meet Public Service Obligations (PSOs)
- establishing effective mechanisms for dispute resolution

Since the 2000s, the government has conducted some efforts to include the policy and regulatory reforms, and launched the infrastructure development program. On the cross-sector level, the government has issued a number of regulations. The Presidential Regulation (Perpres) No.67/2005 provides greater certainty to the private sector by clearing the rules of game, providing the legal framework for all projects - those that are under the responsibility of the national government or contracting agency as well as those that come under the purview of local governments. This Presidential Regulation has been revised to Presidential Regulation No.13/2010 to tackle debottlenecking infrastructure provision, which has not been solved by the old Presidential Regulation. The Minister of Finance Decree No.38/PMK.01/2006 also provides clearer project risk allocation and risk guarantees. In addition, the Perpres No.65/2006 and No.36/2005 have provided a clear direction and mechanism in land acquisition process. The Government Regulation No.8/2007 provides greater opportunities for the central and regional government in supporting the private sector. Additionally, Law No.32/2003 gives greater responsibility to the regional/local government in planning, financing, implementation and management of local infrastructure services.

Recently, new laws in rail, ports, airports, land transport and electricity have been issued to represent a greater shift toward private sector participation in infrastructure.

However, the progress of transaction and implementation of development is still below expectation. One factor that affects it is the lack of adequate preparation of PPP projects, such as the absence of adequate and reliable technical and financial information, particularly detailed analysis of risk sharing and government contributions. Without the possibility of such support, reputable investors, especially from overseas, will continue to be wary of investing.

In order to address the lack of project preparation - which also occurs in the bidding process, and hampers effective risk allocation - and to create a more conducive investment climate for PPP in infrastructure, the Government with the ADB's support established the Infrastructure Reform Sector Development Project (IRSDP); this is under the management of the Project Management Unit (PMU) at Bappenas.

One of the IRSDP's objectives is to provide the Project Development Facility (PDF), a project preparation service provided by Bappenas, to assist in selection of appropriate private partners in infrastructure services. The PDF will ensure project preparation and transaction will meet PPP principles: transparency, accountability, competition and public-private equality. The PDF will retain consultants to assist the line ministries and local governments in PPP project preparations.

### Supply of Electricity

PLN is the main supplier of electricity to the national grid and originally supplied all electricity from its own plants which is financed and built.

Between 1996 and 2006 PLN set up 27 Power Purchase Agreements (PPAs) with Independent Power Producers (IPPs) and 22 of these had to be renegotiated following the 1998-1999 economic crisis. There was almost no investment in new power plants between 2000 and 2006.

PLN launched its 10,000 MW electricity expansion program, comprising 35 new coal-fired power stations, to meet the growing demand for power amid power shortage, especially in the provinces, and to replace the use of fuel oil. PLN aimed to generate 6,900 MW from 10 new power plants in Java, alongside 25 power plants on other island outside The Java-Bali System generating 3,100 MW.

The second 10,000 MW program would comprise 93 power stations, to be built between 2010 and 2014, with a total capacity of 10,153 MW. Of this 5,770 MW or 57% would be for The Java-Bali-Madura grid and the rest would be for Sumatra, Kalimantan, Sulawesi and Eastern Indonesia.

PLN originally planned that up to 48% of the second 10,000 MW power program would be generated from geothermal sources, 26% from coal, 14% from natural gas and 12% from hydropower. The proposed fuel mix was then amended to 37% geothermal, 33% coal-fired, 16% from gas and 12% from hydroelectric power.

### Telecommunication

The Indonesian telecommunication industry is among the fastest growing in the world. In 2008, Indonesia with 140.2 million mobile telephone subscribers, was the third largest telecommunication market in Asia, after China with 615.7 subscribers and India with 346.8 subscribers. According to research conducted by Mobil World Database, the research institution also place Indonesia in sixth place in its top 20 mobile market rankings, above several developed countries, such as Germany, Japan and Italy.

At the same time, Indonesia is still considered to have low penetration rate compared to other Asian countries. In 2008, Indonesia's penetration rate stood at 69%. Given the fact that many subscribers have more than one SIM-card, the actual penetration rate is estimated to be below 50%.

With such low penetration rate, Indonesia which has a large and growing population and increasing disposable incomes, undoubtedly remain a large potential market for the telecommunication industry.

Indonesia has 11 network providers offering both GSM and CDMA based mobile phone services. The number of network providers in the country is quite high compared to those in neighboring countries. Malaysia, for example, has only three providers; Singapore, three; India, seven and Australia four.



## Transportation

The main contribution of reliable transportation system to economic growths is in the form of reduction in overall production cost of goods and services, which in turn leads to higher output from the same input.

With a reliable transportation system, the delivery of goods and services from one place to another can be well planned and scheduled, with a shorter travel time and guaranteed security. A reduction in production cost results not only from low transportation cost, but also from certainty in timely delivery of goods and services necessary to production performance. Since the government launched the infrastructure acceleration program, through the establishment of the Committee for the Acceleration of

Infrastructure Provision (Komite Kebijakan Percepatan Penyediaan Infrastruktur-KKPP) in 2001, the government has completed many transportation infrastructure projects, ranging from the construction of roads in rural areas, terminals for urban transportation, and sidewalk improvement to large scale infrastructure development, such as ports, airports, inter-island bridges and highways.

### Land Transportation

In 2008, the number of vehicles per kilometers of road reached 58, a significant increase from only 13 vehicles per kilometer in 1995. The figure exclude the number of motorcycles per kilometer, which recorded as impressive between 2004 and 2008.

#### ARPU of Selected providers 2007-2014E

Road		
Toal Road	780	Km
Arterial Road	36.500	Km
Other	320.000	Km
Railway	4,625	Km
Sea		
Harbor	1.887	Units
Domestic Fleet	7.300	Ships
Air		
Airport	187	Units

Source: Ministry of Transportation

## Railways

In 2008, PT. KAI Commuter Jabodetabek, a subsidiary of PT. KAI, officially started operation to provide transportation for passengers in Jakarta, Bogor, Depok, Tangerang and Bekasi. The company operates executive train to meet the surge in the number of commuters in these areas. However, there are still many weaknesses in the use of this mode of transportation as the commuter trains use the same tracks as long distance trains, they have to be diverted to siding many times to make way for other trains to pass.

Government plans to build a monorail, subway or Mass Rapid Transit (MRT) in Jakarta and Surabaya to provide more reliable and comfortable transportation facilities for the commuters in the two cities. Currently, railway networks only exist on Java and Sumatra islands. Despite the potential to reduce the burden on roads, development in railways still lag behind that of other transportation modes.

## Water Transportation

As the world's biggest archipelagic country, water transportation plays a vital role in connecting the islands of Indonesia. There are two types of water transportation in Indonesia, namely Inland Waterway Transportation and Sea Transportation. The former involves only domestic routes with the obligation to serve pioneer routes.

## Air Transportation

Since the deregulation of the country's air transportation industry almost ten years ago, airfares have declined sharply. With deregulation, airline operators have more room to set their rates, resulting in fierce competition among them. This, however, benefits customers because they can enjoy lower airfares. The lower airfares also resulted in a sharp increase in the number of passengers which rose to 80 million in 2008 from about 63 million in 2004.

The country's 13 scheduled airlines are Garuda Indonesia, Citilink, Merpati, Lion Air, Indonesia Air Asia, Batavia Air, Sriwijaya Air. The government has applied a safety rating system to improve safety standards. Airlines that are unable to meet the requirements receive an administrative penalty.

Indonesia has totally 187 airports, only seven have runways over three kilometers in length, 60 airports have less than three-kilometer runways, while the remainder only have airstrips less than one kilometer in length.



# 9



## Commitment on **Green Industry**



Indonesia is a country with a very abundant resources, ranging from raw materials, energy, water and resources. However, uncontrolled and excessive use of resources and emissions will exacerbate the issue of environmental quality

Increasing of energy demand, reduction of resource reserves and an increasing of greenhouse gas emissions will become serious challenges for resource-based industries in Indonesia.

The requirements of some export destination countries for environmentally friendly products in the application of Non-Tariff Barriers, is strengthening the government's commitment to reducing greenhouse gas emissions either with or without the help of donors. Even the Ministry of Industry has made efforts to improve industrial competitiveness, including the application of the concept of the Green Industry.

The "Green Industry" is a concept of industrial development based on sustainability to the economic, social involvement, and protection of environmental quality.

Industry's commitment to Go Green can be done through several implementation tools in sustainable processing industry such as cleaner production, energy conservation (energy efficiency), resource efficiency, eco-design, eco-products, the recycling process, and low-carbon technology.

In addition to manufacturing industries, green industries can also be defined as industries that produce environmental goods and services, such as the recycling industry, waste management industry, and manufacturing of clean technologies.

#### Eco Product

Eco products are the products that meet required criteria of environmentally friendly products. Criteria of environmentally friendly products usually based on the environmental regulation which is applicable to such products or based on the environmental impact of the products.

The Indonesian government has begun to formulate criteria of ECO LABEL for environmentally friendly products (detergents, textiles & textile products, finished leather, casual shoes leather). Eco labels are labels that are allowed to be used by a product that meets the criteria specified environmentally friendly.

There are several advantages obtained when national industry applying environmentally friendly products i.e.; the key to enter the global market and free trade market, strengthening the product "Brand", save on production costs (efficiency of energy use, etc.), can sell goods at a price cheap and could be contributing to reducing carbon emissions (to 3R), and improving the productivity of goods production process applied.

#### Strategic Approach

##### 1. Cleaner Production

- Use and reduction of raw materials and auxiliary rather than non-environmental product B3
- Savings on raw materials and auxiliary
- Savings on water
- Savings on energy
- Use of environmentally friendly technologies

##### 2. 3 R

- Reuse: re-use of wastewater for production process without passing through the processing / advance treatment
- Recycle: re-use waste water the production process through the processing / advance treatment
- Recovery: re-making materials that still have economic value

##### 3. Low Carbon / CO2 Emission Reduction:

- Use of environmentally friendly energy / bio-energy / alternative energy
- Savings on energy
- Use of environmentally friendly raw materials

#### Implementation Program:

- Promote international cooperation to share and receive knowledge and learning in policy formulation, planning, and financial support for resource-efficient and low carbon implementation;
- Strengthen institutional capacity to develop and implement resource-efficient and low carbon;
- Develop a strong and coordinated effort between governments, civil society and the private sector (in particular to build a general perception that resource-efficient and low carbon concept as a business opportunity, not as a rule);
- Develop R & D in the field of environmentally friendly technologies;
- Support the development and application of environmentally friendly technologies for product design and production processes;
- Promote the standardization of products and technical regulations relating to eco-friendly product / technology development.

#### Our Ecological Integrity

1. Manila Declaration signed in September 2009 in Manila as a commitment of the Ministry of Industry in realizing the Green Industry;
2. Organizing Conferment Green Industry Award in March 2010,



3. What has been done by the Ministry of Industry to do with the Green Industry are as follows:

- a) Relation to the use of Ozone Depleting Convention Montreal Protocol
  - Regulation of the Minister of Industry No. 33 year 2007 concerning Prohibition of Ozone Depleting Producing and Producing Goods That Use Ozone Depleting
  - Regulation of the Minister of Industry No. 86 years in 2008 on Technical Guidelines for Use and Procedures for Non-CFC Logo Usage Monitoring and Non-Halon & Non CFC
  - Trade Ministerial Regulation No. 24 years in 2006 on the import of ODS
  - Phase Out Hydro Chloro Fluoro Carbon gradually.
- b) The participation of industry in supporting the Kyoto Protocol: CDM PROJECT;
- c) Conduct training to increase human resource capacity at both the concept of three R, Production, Supply, Low Carbon etc.
- d) Prepare technical guidelines on reducing CO2 emissions in cement and steel industries.





# 10 Indonesian Economy IN FIGURES

## Gdp Growth By Sector (in percent)

Description	2006	2007	2008	2009	2010
1. Agriculture, Livestock, Forestry and Fishery	3.36	3.43	4.77	4.13	2.86
2. Mining and Excavating	1.70	2.02	0.51	4.37	3.48
3. Manufacture Industry	4.59	4.67	3.66	2.11	4.48
a. Oil & Gas Industry	-1.66	-0.06	-0.33	(2.21)	-2.31
b. Non-Oil & Gas Industry	5.27	5.15	4.05	2.52	5.09
1). Food, Water and Tobacco	7.21	5.05	2.34	11.29	2.73
2). Textile, Leathers and Footwear Industry	1.23	-3.68	-3.64	0.53	1.74
3). Wood Product and Forestry Industry	-0.66	-1.74	3.45	(1.46)	-3.50
4). Paper and Printing	2.09	5.79	-1.48	6.27	1.64
5). Fertilizer, Chemical and Rubber Industry	4.48	5.69	4.46	1.51	4.67
6). Cement and Mineral Excavating Industry	0.53	3.40	-1.49	(0.63)	2.16
7). Iron Metal and Steel	4.73	1.69	-2.05	(4.53)	2.56
8). Transportation and Parts	7.55	9.73	9.79	(2.94)	10.35
9). Other Goods	3.62	-2.82	-0.96	3.13	2.98
4. Electricity, Gas and Clean Water	5.76	10.33	10.92	13.78	5.31
5. Construction	8.34	8.61	7.31	7.05	6.98
6. Trade, Hotel and Restaurant	6.42	8.41	7.23	1.14	8.69
7. Transport and Telecommunication	14.23	14.04	16.69	15.53	13.45
8. Finance, Leasing and Service	5.47	7.99	8.24	5.05	5.56
9. Services	6.16	6.60	6.45	6.40	6.01
<b>Product Domestic Bruto</b>	<b>5.50</b>	<b>6.28</b>	<b>6.06</b>	<b>4.55</b>	<b>6.10</b>
<b>Product Domestic Bruto Without Oil &amp; Gas</b>	<b>6.11</b>	<b>6.87</b>	<b>6.52</b>	<b>4.93</b>	<b>6.56</b>

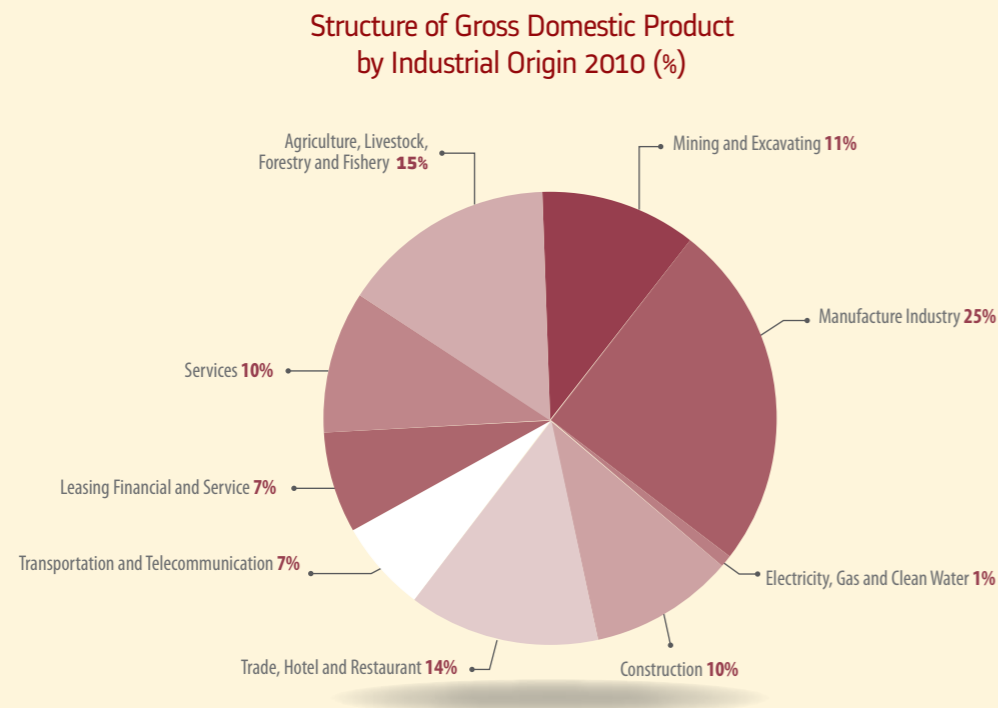
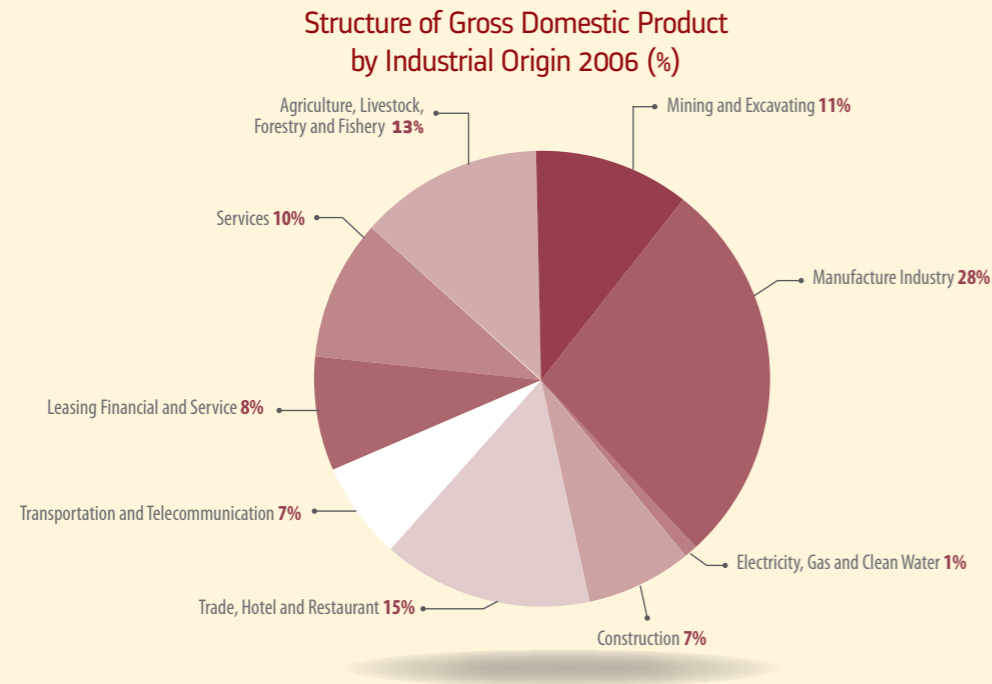
Source: BPS processed by Pusdatin

## Contribution of Industrial Sector to National GDP (in percent)

Description	2006	2007	2008	2009	2010
1. Agriculture, Livestock, Forestry and Fishery	12.97	13.72	14.46	15.29	15.34
2. Mining and Excavating	10.98	11.15	10.92	10.54	11.15
3. Manufacture Industry	27.54	27.05	27.89	26.38	24.82
a. Oil & Gas Industry	5.15	4.61	4.89	3.81	3.27
b. Non-Oil & Gas Industry	22.38	22.43	23.00	22.57	21.55
1). Food, Water and Tobacco	6.37	6.68	6.99	7.49	7.24
2). Textile, Leathers and Footwear Industry	2.70	2.37	2.12	2.08	1.93
3). Wood Product and Forestry Industry	1.34	1.39	1.48	1.43	1.25
4). Paper and Printing	1.19	1.15	1.05	1.09	1.02
5). Fertilizer, Chemical and Rubber Industry	2.82	2.80	3.11	2.90	2.74
6). Cement and Mineral Excavating Industry	0.87	0.83	0.81	0.77	0.71
7). Iron Metal and Steel	0.62	0.58	0.59	0.48	0.42
8). Transportation and Parts	6.27	6.44	6.66	6.17	6.06
9). Other Goods	0.21	0.19	0.18	0.17	0.16
4. Electricity, Gas and Clean Water	0.91	0.88	0.82	0.83	0.78
5. Construction	7.52	7.72	8.48	9.89	10.29
6. Trade, Hotel and Restaurant	15.02	14.99	13.97	13.37	13.72
7. Transport and Telecommunication	6.93	6.69	6.31	6.28	6.50
8. Finance, Leasing and Service	8.06	7.73	7.43	7.20	7.21
9. Services	10.07	10.08	9.73	10.22	10.19
<b>Product Domestic Bruto</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>
<b>Product Domestic Bruto Without Oil &amp; Gas</b>	<b>88.85</b>	<b>89.46</b>	<b>89.41</b>	<b>91.68</b>	<b>92.23</b>

Source: BPS processed by Pusdatin

## Comparison 2006-2010 (in percent)



Source: BPS processed by Pusdatin

## Non Oil and Gas Export by Two Digits of HS Code (Commodity Group) January-December 2010

No	Commodity Group (HS)	FOB Value (Million US\$)				Change of Dec Over Dec 2010	Share to Total Non-Oil & Gas Export 2010 (%)
		November 2010	December 2010	Jan-Dec 2010	Jan-Dec 2010		
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
1	Mineral fuels, mineral oil products (27)	2 050,4	1 835,2	13 934,0	18 725,7	-215.2	14.44
2	Animal or vege. fats and oils (15)	2 074,1	2 130,6	12 219,5	16 294,8	56.5	12.56
3	Elect. machinery, sound rec., tv etc (85)	983.9	890.1	8 020,4	10 374,1	-93.8	8
4	Rubber and articles thereof (40)	881.4	963.7	4 912,8	9 373,3	82.3	7.23
5	Ores, slag, and ash (26)	798.8	1 031,1	5 804,6	8 091,1	232.3	6.24
6	Nuclear react., boilers, mech.application (84)	443	456.9	4 721,7	4 987,3	13.9	3.84
7	Carton & Paper (48)	362.8	409.3	3 357,3	4 184,4	46.5	3.23
8	Vehicles other than railway (87)	301.5	293.9	1 957,8	2 899,9	-7.6	2.23
9	Organic Chemical (29)	268.2	266.2	1 672,4	2 691,6	-2	2.08
10	Tin (80)	224.1	194.7	1 268,0	1 734,6	-29.4	1.34
Total of Commodity Groups		8 388,2	8 471,7	57 868,5	79 356,8	83.5	61.19
Others		4 428,7	5 039,3	39 623,2	50 323,1	610.6	38.81
<b>Total of Non Oil Gas Exports</b>		<b>12 816,9</b>	<b>13 511,0</b>	<b>97 491,7</b>	<b>129 679,9</b>	<b>694.1</b>	<b>100</b>

## Non Oil and Gas Imports of Ten Main Commodity Groups in Indonesia January-December 2010

No	Commodity Group (HS)	FOB Value (Million US\$)				Change of Dec Over Dec 2010	Share to Total Non-Oil & Gas Import 2010 (%)
		November 2010	December 2010	Jan-Dec 2009	Jan-Dec 2010		
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
1	Nuclear react.,boilers,mch.appli (84)	1 835,2	1 860,5	14 623,1	20 015,6	25.3	18.49
2	Elect. machinery, sound react.,tv etc (85)	1 429,0	1 470,4	11 305,3	15 634,1	41.4	14.44
3	Iron and Steel (72)	636.5	639.7	4 356,6	6 371,9	3.2	5.89
4	Vehicles other than railway (87)	624.5	479.8	3 151,1	5 734,8	-144.7	5.3
5	Organic chemicals (29)	473.7	514.1	3 941,1	5 326,5	40.4	4.92
6	Plastic and articles thereof (39)	441.2	476.3	3 210,7	4 817,2	35.1	4.45
7	Aircraft and its components (88)	297.7	239.5	3 241,5	3 528,1	-58.2	3.26
8	Articles of iron and steel (73)	316.5	289	2 784,1	3 448,6	-27.5	3.19
9	Cotton (52)	209.6	245.9	1 476,1	2 232,3	36.3	2.06
10	Serealia	265	404.7	1 506,2	2 159,2	139.7	1.99
Totals of 10 Main Commodity Groups		6 528,9	6 619,9	49 595,8	69 268,3	91	63.99
Other		3 531,8	3 876,3	28 252,7	38 974,9	344.5	36.01
<b>Total Non Oil &amp; Gas Imports</b>		<b>10 060,7</b>	<b>10 496,2</b>	<b>77 848,5</b>	<b>108 243,2</b>	<b>435.5</b>	<b>100</b>

Source: BPS processed by Pusdatin

## Export Values by Sector

January-December 2009 and 2010

Description	FOB Value (Million US\$)		Change of Jan-Dec 2010 Over 2009 (%)	% Share to Total Jan-Dec 2010
	Jan-Dec 2009	Jan-Dec 2010		
(1)	(2)	(3)	(4)	(5)
<b>Total Export</b>	<b>116 510,0</b>	<b>157 732,6</b>	<b>35.38</b>	<b>100</b>
Oil & Gas	19 018,3	28 052,7	47.5	17.78
Non-Oil & Gas	97 491,7	129 679,9	33.02	82.22
- Agricultural	4 352,7	5 001,3	14.9	3.17
- Manufacturing	73 435,9	98 013,2	33.47	62.14
- Mining & Others	19 703,1	26 665,4	35.34	16.91

## Unemployment Rate of Indonesia During Economic Crisis

Year	February	August
(1)	(2)	(3)
2006	10.5	10.3
2007	9.8	9.1
2008	8.5	8.4
2009	8.1	7.9

## Poverty in Indonesia During Economic Crisis

Year	Number (Million)	Percentage
(1)	(2)	(3)
2006	39.30	17.75
2007	37.17	16.58
2008	34.96	15.42
2009	32.53	14.15
2010	31.02	13.13

Source: BPS processed by Pusdatin

## Indonesia Non-Oil Gas Export by Country of Destination

January-December 2010

No	Destination Country	FOB Value (Million US\$)				Change of Dec Over Dec 2010	Share to Total Non-Oil & Gas Export 2010 (%)
		November 2010	December 2010	Jan-Dec 2009	Jan-Dec 2010		
(1)	(2)	(3)	(4)	(5)	(6)	(7)	
<b>ASEAN</b>		<b>2 633,1</b>	<b>2 685,8</b>	<b>20 448,4</b>	<b>26 981,6</b>	<b>52.7</b>	<b>20.81</b>
1	Singapore	942.8	864.5	7 947,5	9 560,2	-78.3	7.37
2	Malaysia	740.2	909.7	5 636,4	7 752,1	169.5	5.98
3	Thailand	376.4	371	2 598,4	4 054,2	-5.4	3.13
	Other ASEAN Countries	573.7	540.6	4 266,1	5 615,1	-33.1	4.33
<b>EUROPE</b>		<b>1 577,9</b>	<b>1 930,6</b>	<b>13 533,4</b>	<b>17 069,8</b>	<b>352.7</b>	<b>13.16</b>
4	Germany	232.8	330.4	2 326,2	2 983,4	97.6	2.3
5	France	91.6	97.9	870.2	1 122,6	6.3	0.87
6	UK	133.7	146.3	1 431,5	1 693,1	12.6	1.3
	Other European Countries	1 119,8	1 356,0	8 905,5	11 270,7	236.2	8.69
<b>OTHER MAIN COUNTRIES</b>		<b>5 889,3</b>	<b>5 872,5</b>	<b>41 130,5</b>	<b>56 385,3</b>	<b>-16.8</b>	<b>43.48</b>
7	China	1 761,4	1 695,4	8 920,1	14 072,6	-66	10.85
8	Japan	1 675,5	1 721,9	11 978,9	16 500,5	46.4	12.72
9	USA	1 124,1	1 300,8	11 978,9	13 327,2	176.7	10.28
10	Australia	271.8	220	11 978,9	2 362,8	-51.8	1.82
11	South Korea	696.5	618.8	5 174,3	6 870,5	-77.7	5.3
12	Taiwan	360	315.6	2 875,5	3 251,7	-44.4	2.51
<b>Total of 12 Destination Countries</b>		<b>8 406,8</b>	<b>8 592,3</b>	<b>61 940,7</b>	<b>83 550,9</b>	<b>185.5</b>	<b>64.43</b>
Others		4 410,1	4 918,7	35 551,0	46 129,0	508.6	35.57
<b>Total Non-Oil &amp; Gas Exports</b>		<b>12 816,9</b>	<b>13 511,0</b>	<b>97 491,7</b>	<b>129 679,9</b>	<b>129 679,9</b>	<b>100</b>

Source: BPS processed by Pusdatin

## Indonesia Non Oil & Gas Import by Country of Origin

January-December 2010

No	Destination Country	FOB Value (Million US\$)				Change of Dec Over Dec 2010	Share to Total Non-Oil & Gas Export 2010 (%)
		November 2010	December 2010	Jan-Dec 2009	Jan-Dec 2010		
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
<b>ASEAN</b>		<b>2 106,8</b>	<b>2 275,3</b>	<b>18 046,5</b>	<b>23 851,0</b>	<b>168.5</b>	<b>22.03</b>
1	Singapore	870.9	911.4	9 236,6	10 053,5	40.5	9.29
2	Thailand	644.1	621.6	4 570,8	7 420,6	-22.5	6.85
3	Malaysia	354.8	481	3 184,2	4 520,9	126.2	4.18
	Other ASEAN Countries	237	261.3	1 054,9	1 856,0	24.3	1.71
<b>EUROPE</b>		<b>978</b>	<b>878.2</b>	<b>8 649,2</b>	<b>9 767,2</b>	<b>-99.8</b>	<b>9.02</b>
4	Germany	279	294.5	2 362,0	2 986,1	15.5	2.76
5	France	227.1	105.8	1 622,8	1 317,8	-121.3	1.22
6	UK	71.1	73.6	844	937	2.5	0.86
	Other European Countries	400.8	404.3	3 820,4	4 526,3	3.5	4.18
<b>OTHER MAIN COUNTRIES</b>		<b>5 193,5</b>	<b>5 570,0</b>	<b>39 529,7</b>	<b>58 530,0</b>	<b>376.5</b>	<b>54.07</b>
7	Japan	1 503,2	1 583,1	9 810,5	16 908,4	79.9	15.62
8	China	1 503,2	2 005,3	13 491,4	19 687,2	233.5	18.19
9	USA	705.2	763.9	7 037,6	9 291,3	58.7	8.58
10	South Korea	705.2	530.6	3 807,8	5 593,7	-15.8	5.17
11	Australia	400.1	402.2	3 374,1	4 092,9	2.1	3.78
12	Taiwan	266.8	284.9	2 008,3	2 956,5	18.1	2.73
<b>Total of 12 Main Countries</b>		<b>7 640,5</b>	<b>8 057,9</b>	<b>61 350,1</b>	<b>85 765,9</b>	<b>417.4</b>	<b>79.23</b>
<b>Others</b>		<b>2 420,2</b>	<b>2 438,3</b>	<b>16 498,4</b>	<b>22 477,3</b>	<b>18.1</b>	<b>20.77</b>
<b>Total Non-Oil &amp; Gas Imports</b>		<b>10 060,7</b>	<b>10 496,2</b>	<b>77 848,5</b>	<b>108 243,2</b>	<b>435.5</b>	<b>100</b>

## Investment Estimate of Non-Oil & Gas Industry

2009 – 2014 (In Billion Rupiah)

No	Description	2009	2010	2011	2012	2013	2014	Total 2010-2014
	Non Oil & Gas Industry	77,327.97	106,144.09	124,608.40	147,261.99	168,429.50	189,512.50	735,956.48
1	Food, Water and Tobacco	23,817.01	34,178.40	38,877.82	44,473.12	47,665.55	55,527.16	220,722.05
2	Textile, Leathers and Foodwear Industry	7,423.49	9,765.26	11,090.15	12,811.79	13,811.22	15,919.05	63,397.47
3	Wood Product and Forestry Industry	3,015.79	4,139.62	4,735.12	5,448.69	6,063.46	6,822.45	27,209.34
4	Paper and Printing	3,634.41	4,776.48	5,607.38	6,626.79	7,747.76	8,528.06	33,286.47
5	Fertilizer, Chemical and Rubber Industry	9,666.00	12,843.43	15,451.44	18,849.53	22,569.55	24,826.14	94,540.10
6	Cement and Mineral Excavating Industry	2,319.84	3,078.18	3,613.64	4,270.60	4,884.46	5,495.86	21,342.74
7	Iron Metal and Steel	1,159.92	1,486.02	1,869.13	2,356.19	3,200.16	3,411.23	12,322.72
8	Transportation and Parts	25,672.89	34,921.41	41,369.99	49,332.77	57,602.89	64,055.23	247,282.27
9	Other Goods	618.62	849.15	996.87	1,178.10	1,515.87	1,705.61	6,245.59

Source: Pusdatin

## Investment Realization 2010

by Sector

### Domestic Investment

No.	SECTOR	INVESTMENT (Rp. Billion)
Lainnya:		
1	Organic Chemical, Chemical Product and Pharmacy	3.266,0
2	Mining	3.075,0
3	Mineral Non Metal Industry	2.264,8
4	Paper, Paper Product and Printing Industry	1.102,8
5	Iron & Steel, Machinery and Electronics	789,6
6	Rubber, Rubber Product and Plastic Industry	522,8
7	Wood Industry	451,3
8	Textile Industry	431,7
9	Hotel d and Resturant	390,3
10	Transportation and Parts	362,2
11	Real Estate, Industrial Estate and Offices Building	261,7
12	Forestry	171,6
13	Livestock	156,5
14	Trade and Reparation	116,4
15	Construction	67,6
16	Leather,Leather Product and Shoes	12,5
17	Other Industry	3,7
18	Fishery	1,0

Source: BKPM processed by Pusdatin

### Foreign Investment

No.	SECTOR	INVESTMENT (US\$. Juta)
Lainnya:		
1	Organic Chemical, Chemical Product and Pharmacy	798,42
2	Trade and Reparation	784,66
3	Food Crops and Plantation	750,93
4	Construction	619,85
5	Iron & Steel, Machinery and Electronics	589,61
6	Other Srvices	573,80
7	Transportation and Parts	393,77
8	Hotel d and Resturant	312,06
9	Textile Industry	154,80
10	Leather,Leather Product and Shoes	144,13
11	Rubber, Rubber Product and Plastic Industry	104,96
12	Paper, Paper Product and Printing Industry	46,41
13	Wood Industry	43,06
14	Forestry	39,36
15	Mineral Non Metal Industry	28,40
16	Other Industry	26,23
17	Fishery	18,02
18	Livestock	4,70
19	Medical Equipment, Optical, Measurements Tools and Watch	1,37



## Total Export Development and 12 Main Industrial Commodities 2010

NO	DESCRIPTION	2005	2006	2007	2008	2009	2010	Contri- bution (%)	Change (%)
<b>TOTAL EXPORT OF INDONESIA</b>		<b>85.660,0</b>	<b>100.798,6</b>	<b>114.100,9</b>	<b>137.020,4</b>	<b>116.510,0</b>	<b>157.779,1</b>	<b>100,0</b>	<b>35,42</b>
<b>I. OIL &amp; GAS</b>		<b>19.231,6</b>	<b>21.209,5</b>	<b>22.088,6</b>	<b>29.126,3</b>	<b>19.018,3</b>	<b>28.039,6</b>	<b>17,8</b>	<b>47,43</b>
A.	Oil	1.932,0	2.843,6	2.878,8	3.547,0	2.262,3	3.967,3	2,5	75,36
B.	Crude Oil	8.145,8	8.168,8	9.226,0	12.418,7	7.820,3	10.402,9	6,6	33,02
C.	Natural Gas	9.153,7	10.197,1	9.983,8	13.160,5	8.935,7	13.669,5	8,7	52,98
<b>II. NON OIL &amp; GAS</b>		<b>66.428,4</b>	<b>79.589,1</b>	<b>92.012,3</b>	<b>107.894,2</b>	<b>97.491,7</b>	<b>129.739,5</b>	<b>82,2</b>	<b>33,08</b>
A.	Industry	55.567,0	64.990,3	76.429,6	88.351,7	73.435,8	98.015,1	62,1	33,47
B.	Agriculture	2.906,8	3.398,5	3.689,0	4.626,4	4.352,8	5.001,9	3,2	14,91
C.	Mining	7.946,8	11.191,5	11.884,9	14.906,2	19.692,3	26.712,6	16,9	35,65
D.	Others	7,8	8,9	8,8	9,9	10,8	9,9	0,0	-7,85
<b>EXPORT OF 12 MAIN INDUSTRIAL COMMODITIES</b>		<b>49.757,7</b>	<b>58.154,4</b>	<b>68.517,9</b>	<b>79.066,1</b>	<b>65.376,6</b>	<b>87.691,8</b>	<b>55,6</b>	<b>34,13</b>
1	Processing of Coconut/Crude Palm Oil	5.419,2	6.407,3	10.476,8	16.168,1	12.924,9	17.253,8	17,6	33,49
2	Texille	8.584,9	9.422,8	9.790,1	10.116,3	9.245,1	11.205,5	11,4	21,20
3	Iron Steel, Machinery and Automotive	5.949,7	7.712,7	9.606,9	11.815,0	8.701,1	10.840,0	11,1	24,58
4	Rubber Processing	3.545,8	5.465,2	6.179,9	7.579,7	5.020,2	9.522,6	9,7	89,69
5	Electronica	7.853,0	7.200,2	6.359,7	6.806,7	7.899,6	9.254,6	9,4	17,15
6	Processing of Copper, Tin etc.	3.133,5	4.134,0	6.156,0	5.660,7	4.241,5	6.506,0	6,6	53,39
7	Pulp and Paper	3.257,5	3.983,3	4.440,5	5.219,6	4.272,4	5.708,2	5,8	33,61
8	Basic Chemical	2.750,2	3.521,4	4.492,5	3.738,4	3.161,2	4.568,6	4,7	44,52
9	Wood Processing	4.476,3	4.757,6	4.485,1	4.206,1	3.441,5	4.280,3	4,4	24,38
10	Food & Beverages	1.647,9	1.866,0	2.374,8	3.104,8	2.576,4	3.228,6	3,3	25,31
11	Leather, Leather Goods and Shoes/Footwear	1.683,7	1.913,2	2.006,6	2.260,5	1.888,1	2.665,6	2,7	41,18
12	Electricity Goods	1.456,0	1.770,9	2.148,9	2.390,2	2.004,6	2.657,9	2,7	32,59
	Other Industries	5.809,3	6.835,9	7.911,7	9.285,6	8.059,3	10.323,3	10,5	28,09
<b>Total Industry of Non Oil &amp; Gas</b>		<b>55.567,0</b>	<b>64.990,3</b>	<b>76.429,6</b>	<b>88.351,7</b>	<b>73.435,8</b>	<b>98.015,1</b>	<b>100,0</b>	<b>33,47</b>
Contribution of 12 main industrial commodities toward total industry (%)		89,55	89,48	89,65	89,49	89,03	89,47		
Contribution of Industry toward non oil & gas (%)		83,65	81,66	83,06	81,89	75,33	75,55		
Contribution of Industry toward total export (%)		64,87	64,48	66,98	64,48	63,03	62,12		

Source: Pusdatin, Misnistry of Industry

Remarks: 1) Contribution of Oil & Gas and Non Oil & Gas towards Total export  
2) Contribution of each industry toward Total Expot of Non-Oil & Gas

Source: BPS processed by Pusdatin

## Inflation Rate of Indonesia During Economic Crisis (in percent)

MONTH	YEAR				
	2006	2007	2008	2009	2010
(1)	(3)	(4)	(5)	(6)	(7)
January	1.36	1.04	1.77	-0.07	0.84
February	0.58	0.62	0.65	0.21	0.30
March	0.03	0.24	0.95	0.22	-0.14
April	0.05	-0.16	0.57	-0.31	0.15
May	0.37	0.10	1.41	0.04	0.29
June	0.45	0.23	2.46	0.11	0.97
July	0.45	0.72	1.37	0.45	1.75
August	0.33	0.75	0.51	0.56	0.76
September	0.38	0.80	0.97	1.05	0.44
October	0.86	0.79	0.45	0.19	0.06
November	0.34	0.18	0.12	-0.03	0.60
December	1.21	1.10	-0.04	0.33	0.92
<b>Yearly</b>	<b>6.60</b>	<b>6.59</b>	<b>11.06</b>	<b>2.78</b>	<b>6.96</b>



## Within the Ministry of Industry

### SECRETARIAT GENERAL

To coordinate the implementation of duties, fostering and administrative supporting to all the units of organizations existing in the domain of the Ministry of Industry;

### INSPECTORATE GENERAL

Preparing the policy formulation, implementing internal control, and conducts oversight of all activities within each units of the Ministry of Industry to ensure that they are in accordance with existing policy.

### DIRECTORATE GENERAL OF MANUFACTURING BASED INDUSTRY

To formulate and implement the technical policy and standardization in the sector of manufacturing based industry.

### DIRECTORATE GENERAL OF AGRO BASED INDUSTRY

To formulate and execute the technical policies and standardization in the sector of agro based industry.

### DIRECTORATE GENERAL OF LEADING HIGH TECHNOLOGY BASED INDUSTRY

To formulate and implement the technical standardization and policies in the sector of leading and high technology based industry.

### DIRECTORATE GENERAL OF SMALL AND MEDIUM INDUSTRY

To formulate and implement the technical standardization and policies in the sector of small and medium industry.

### DIRECTORATE GENERAL OF INDUSTRIAL REGIONAL DEVELOPMENT

To formulate and implement policies and technical standardization in the sector of industrial regional development.

### DIRECTORATE GENERAL OF INTERNATIONAL INDUSTRIAL COOPERATION

To formulate and implement policies and technical standardization in the sector of international industrial cooperation.

### AGENCY FOR STUDY OF INDUSTRIAL POLICY, CLIMATE AND QUALITY

To conduct researches and investigations as well as preparation of macro policy plan for medium and long-term industrial development, cluster development policy of priority industry as well as industrial climate and quality.

## Selected Government Websites

The Ministry of Home Affairs	<a href="http://www.depdagri.go.id">www.depdagri.go.id</a>
The Ministry of Foreign Affairs	<a href="http://www.kemlu.go.id">www.kemlu.go.id</a>
The Ministry of Defense	<a href="http://www.kemhan.go.id">www.kemhan.go.id</a>
The Ministry of Finance	<a href="http://www.depkeu.go.id">www.depkeu.go.id</a>
The Ministry of Religious	<a href="http://www.kemenag.go.id">www.kemenag.go.id</a>
The Ministry of Agriculture	<a href="http://www.deptan.go.id">www.deptan.go.id</a>
The Ministry of Education	<a href="http://www.kemdiknas.go.id">www.kemdiknas.go.id</a>
The Ministry of Health	<a href="http://www.depkes.go.id">www.depkes.go.id</a>
The Ministry of Social Services	<a href="http://www.depsos.go.id">www.depsos.go.id</a>
The Ministry of Transportation	<a href="http://www.dephub.go.id">www.dephub.go.id</a>
The Ministry of Manpower and Transmigration	<a href="http://www.nakertrans.go.id">www.nakertrans.go.id</a>
<b>The Ministry of Industry</b>	<b><a href="http://www.kemenperin.go.id">www.kemenperin.go.id</a></b>
The Ministry of Trade	<a href="http://www.depdag.go.id">www.depdag.go.id</a>
The Ministry of Energy and Mineral Resources	<a href="http://www.esdm.go.id">www.esdm.go.id</a>
The Ministry of Justice and Human Rights	<a href="http://www.depkmham.go.id">www.depkmham.go.id</a>
The Ministry of Public Housing	<a href="http://www.kemenpera.go.id">www.kemenpera.go.id</a>
The Ministry of Forestry	<a href="http://www.dephut.go.id">www.dephut.go.id</a>
The Ministry of Maritime Affairs and Fisheries	<a href="http://www.kkp.go.id">www.kkp.go.id</a>
The Ministry of Public Works	<a href="http://www.pu.go.id">www.pu.go.id</a>
State Ministry of Culture and Tourism	<a href="http://www.budpar.go.id">www.budpar.go.id</a>
State Ministry of Women Empowerment	<a href="http://www.menegpp.go.id">www.menegpp.go.id</a>
State Ministry of State Enterprises	<a href="http://www.menpan.go.id">www.menpan.go.id</a>
State Ministry of National Development Planning Board	<a href="http://www.bappenas.go.id">www.bappenas.go.id</a>
State Ministry of Environment	<a href="http://www.menlh.go.id">www.menlh.go.id</a>
State Ministry of Research and Technology	<a href="http://www.ristek.go.id">www.ristek.go.id</a>
State Ministry of Information and Communication	<a href="http://www.depkominfo.go.id">www.depkominfo.go.id</a>
State Ministry of Development of Disadvantaged Regions	<a href="http://www.kemenegpdt.go.id">www.kemenegpdt.go.id</a>
State Ministry of Youth and Sports Affairs	<a href="http://www.kemenpora.go.id">www.kemenpora.go.id</a>
Agency for the Assessment and Application of Technology	<a href="http://www.bppt.go.id">www.bppt.go.id</a>
Indonesia Central Bureau of Statistic (BPS)	<a href="http://www.bps.go.id">www.bps.go.id</a>
The National Agency of Drug and Food Control	<a href="http://www.pom.go.id">www.pom.go.id</a>
National Standardization Agency	<a href="http://www.bsn.or.id">www.bsn.or.id</a>

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