



World Ceramic Tiles Forum INDONESIA

Shanghai, 13 November 2014



National Context – INDONESIA



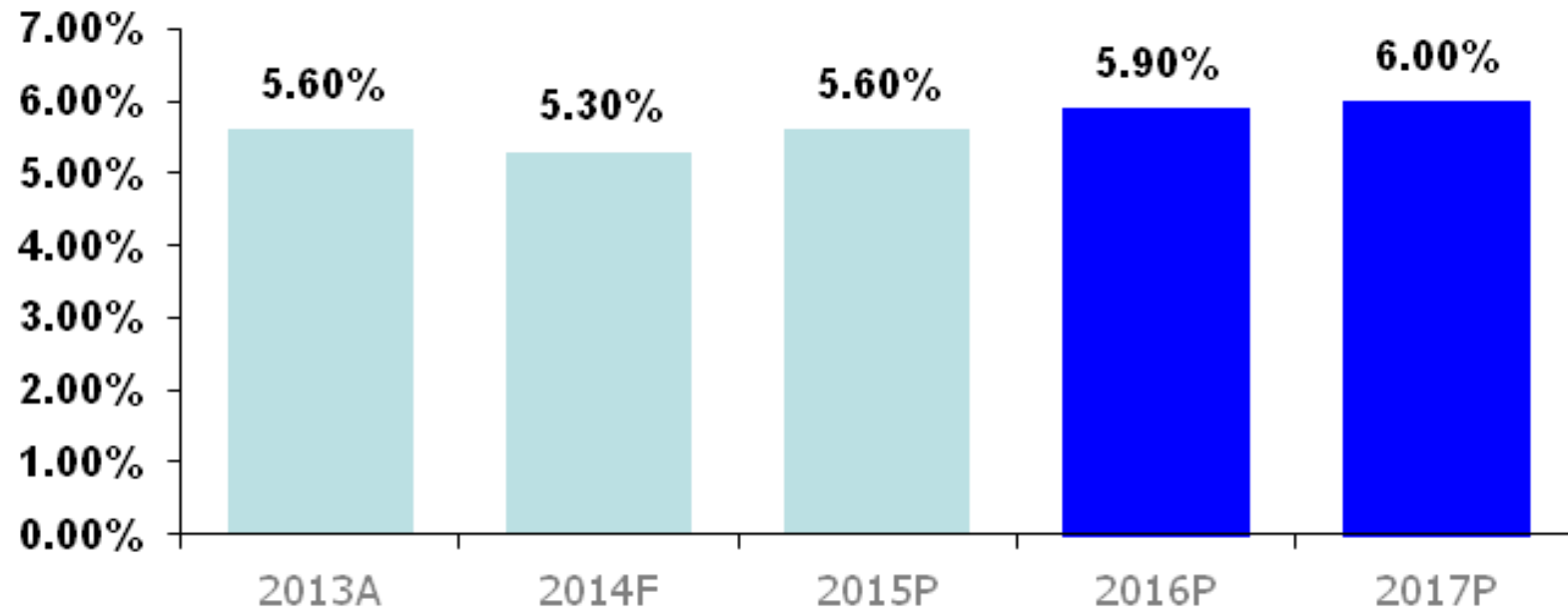
- Indonesia economy outlook
- Construction Value
- Average Minimum Wages
- Interest rate & Inflation rate
- Energy Price
- Electricity Tariff
- Ceramic Industry
- Ceramic Tiles
- Development of Government Regulation in ceramic tiles
- Keramika and its growth

Indonesia economy outlook

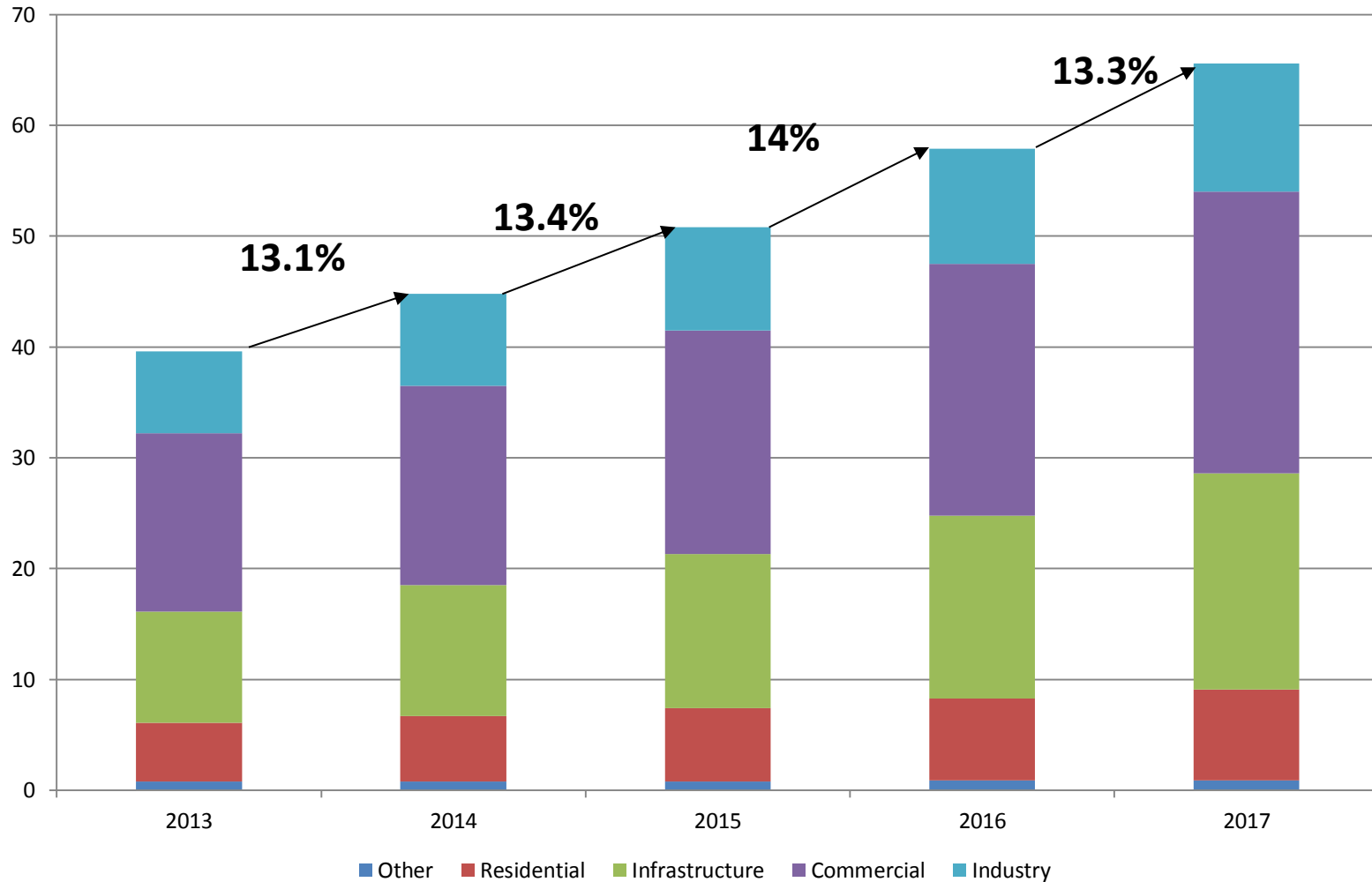
(sources: Indonesian Finance Department)



● Real GDP Growth

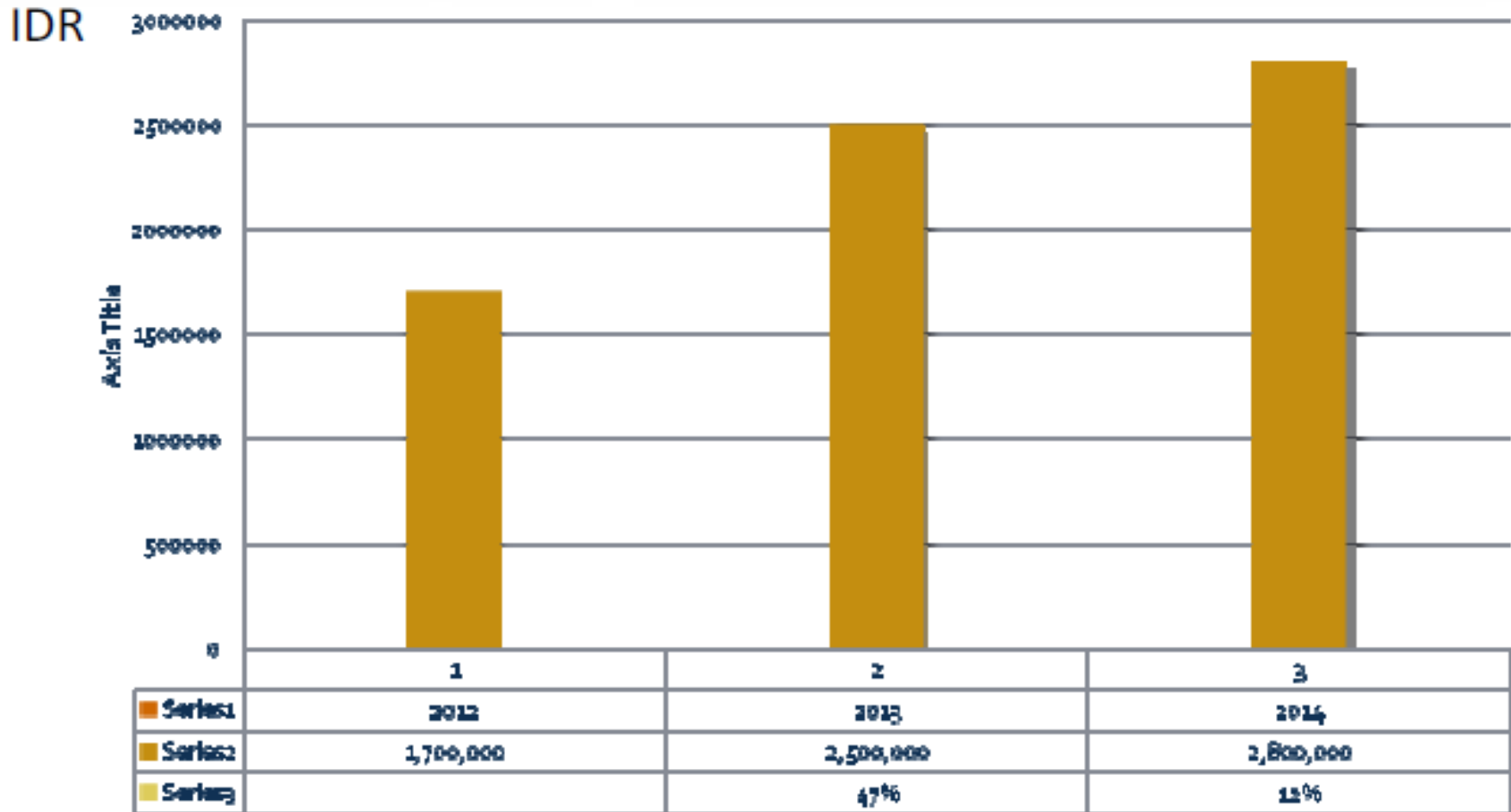


Construction Value (in billion USD)



Source : Solidience

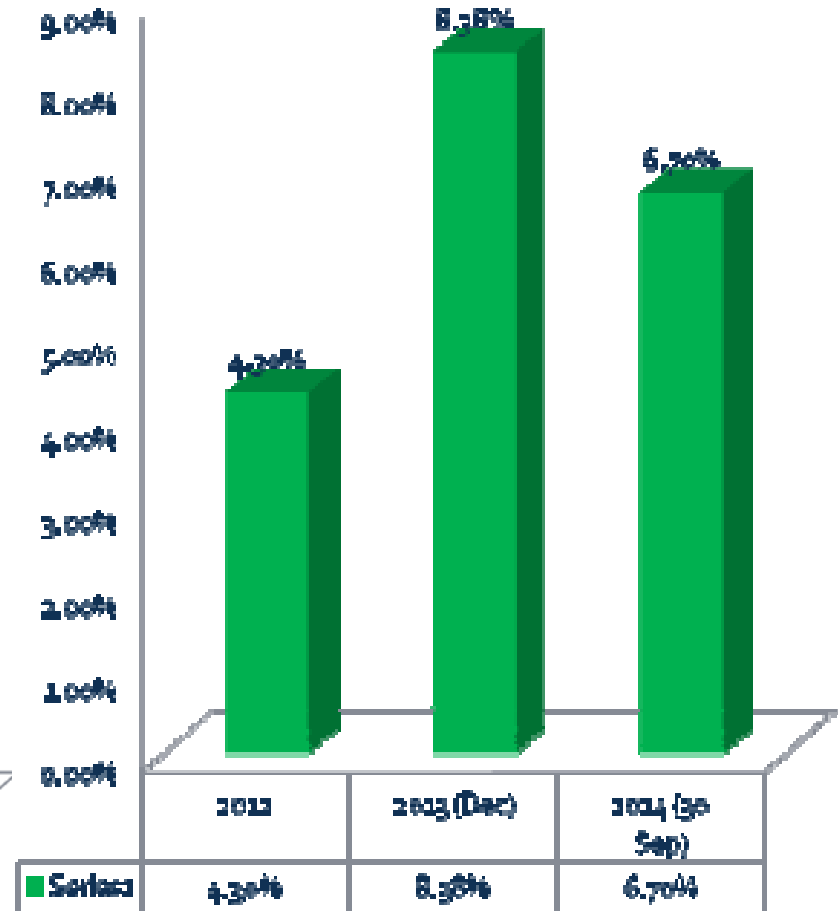
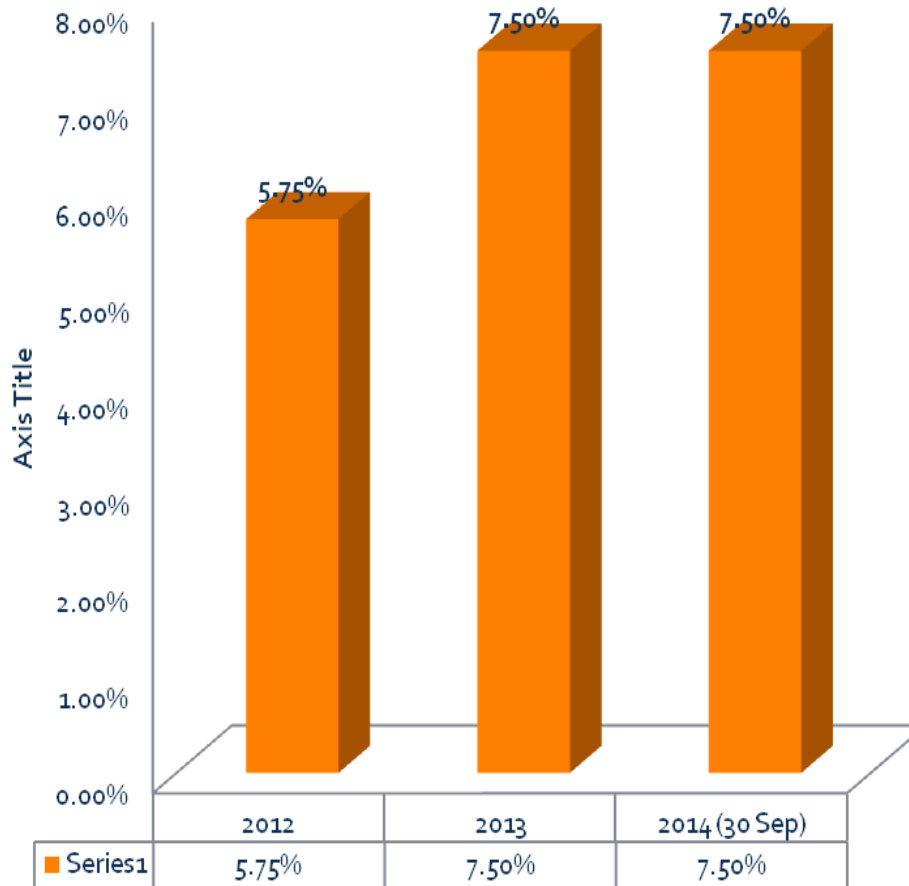
Average Minimum Wage



Source: Labor Dept

Interest rate

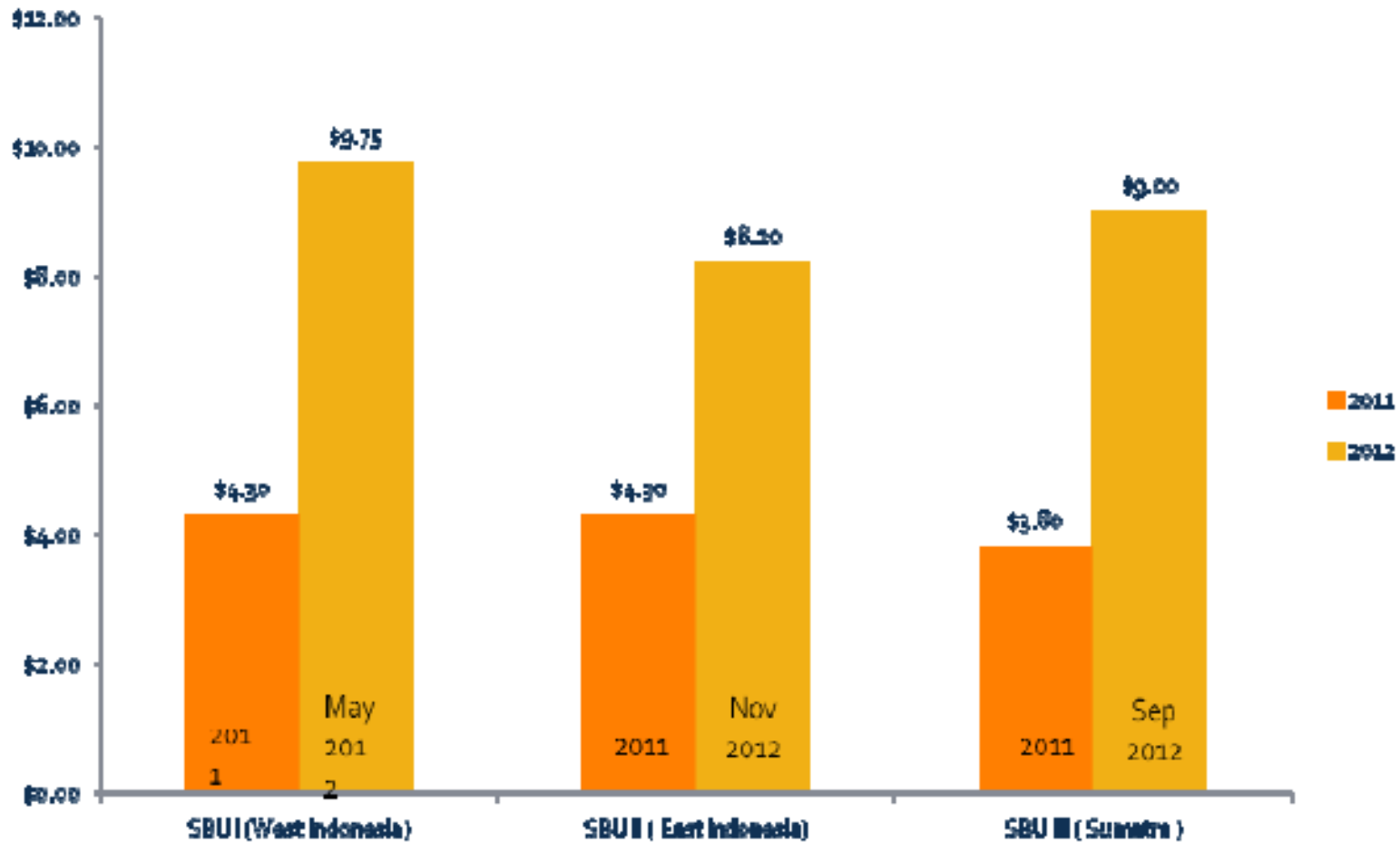
Inflation rate



Source: Indonesian Central Bank

Energy price in MMBTU

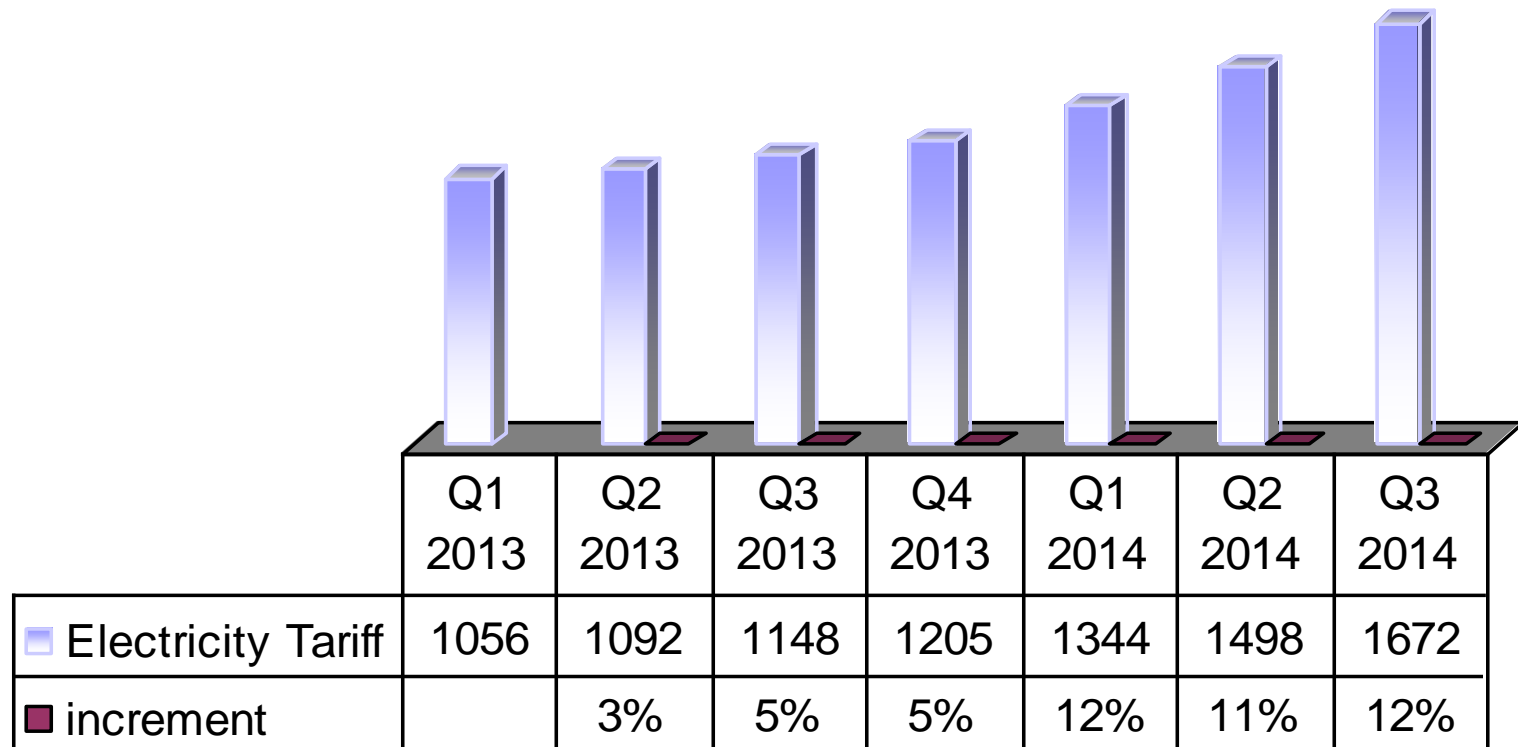
(including toll fee)



Source: PGN

Electricity Tariff

IDR/KWH



Source: Indonesia Utilities Government

Indonesian Ceramic Industry



Description	2012	2013	2014(est)
Installed capacity	390 million sqm	420 million sqm	490 million sqm
Real Production	370 million sqm	410 million sqm	450 million sqm
Total population	244 million	250 million	253 million
Consumption/capita	1.56 sqm/capita	1.72 sqm/capita	1.86 sqm/capita
Export	10%	13%	11%
Import	16%	14%	14%
Total Value	1.4 billion USD	1.45 billion USD	1.65 billion USD

Source : ASAKI

Ceramic tile trends

- Movement towards higher value added products especially with the advent of the Digital technology.
- Popular marketable sizes in volumes are: 30x30 and 40x40 for floor tiles
- Popular marketable sizes in volumes are : 20x25 and 25x40 for wall tiles
- Surface: Glossy are preferable for mass market with a growing trend towards matt and semi polished.
- Designs preference : Marble, Geometrical , stone and wood.

National Regulation in ceramic tile



- September 1, 2012: The implementation of Indonesian National Standard (SNI) for ceramics industry (tiles, sanitary and tableware). No 46/M-IND/PER/3/2012
- January 1, 2013: Enforcement of Indonesian National Standard (SNI) for ceramics industry No 67/M-DAG/PER/11/2013, mandatory labeling in Bahasa Indonesia for all commodities including ceramics.
- Strict compliance for importation of digital printing machine.

KERAMIKA

organized by ASAKI



1. Integrate

Indonesian ceramic industry to promote and improve the production and quality of the ceramics

2. Develop

Indonesian ceramic members to be part of the global competitive players

3. Recognize

Indonesian as one of the key hub for innovations and quality ceramics manufacturing

Growth of KERAMIKA over the years



KERAMIKA	2012 1st edition	2013 2nd edition	2014 3rd edition
THEME	New Technology & Latest Design in Ceramics	Creativity and Innovation for Better Living	Digital Era with The Latest Technology
PARTICIPANT	44	60	76
SPACE	2,232 sqm	3,391 sqm	4,071 sqm
VISITOR Growth (%)	15,490 visitors	20,465 visitors 32%	26,655 visitors 30%