

REGIONAL INVESTMENT FORUM (RIF) 2018

Showcasing Investment Opportunities in
Lifestyle and Tourism Industry

14-15 March, Yogyakarta - Indonesia



**Culinary & Cafe | Cinemas | Fashion | Spa & Sport Center
Digital Industry | 10 Tourism Destination | Etc**

WHY ATTEND?

Be the first to know the latest investment climate, trend, regulation, government priorities & support on investment, from prominent speakers, regional government, authorities, and business players by attending the investment forum.

Meet and connect with over 550 participants from foreign and domestic investor, business association, banks/financial institutions, central and regional government, including potential local partners through prearranged one on one business meeting.

Explore investment opportunities in various sectors in over 34 Provinces, first-hand investment project opportunities and hear reliable information presented by the key speakers.

WHY SHOULD YOU TAKE PART IN THE INDONESIA'S TOURISM & LIFESTYLE INDUSTRY?



Thomas Lembong
Chairman Indonesia
Investment Coordinating Board

"While now million of Indonesian people are joining the middle class, I believe there are two sectors that will encourage economic growth, namely tourism & lifestyle industry."



Arief Yahya
Indonesia Tourism Ministry

"Tourism growth in Indonesia is one of the best in the world and among the top 20 fastest growing Asian tourist destination."



Triawan Munaf
Chairman of Indonesia Creative
Economy Agency

"Creative economy contribute to 7.38% of the Indonesia GDP, so we must accelerate creative industry to grow."



Agus Martowardojo
Governor of Bank Indonesia

"Creative economy and tourism could support Indonesia's future economic growth."



Sri Sultan Hamengku Buwono X
Governor of Yogyakarta

"Yogyakarta is ready to be the center of creative industry in Indonesia."

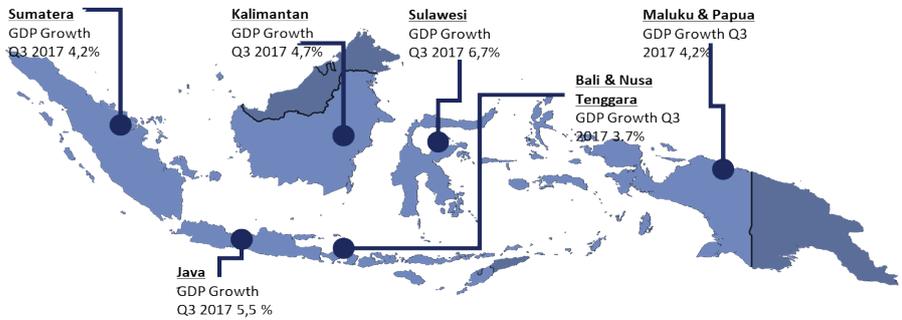
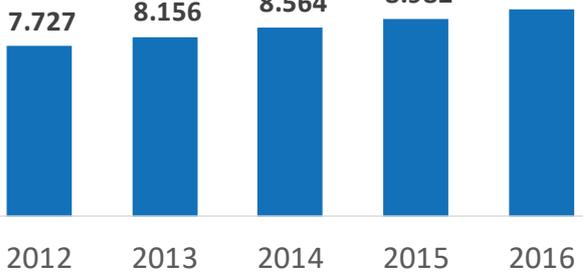
Indonesia: Growing Middle Class

Indonesia is blessed with an abundance of natural beauty and unique cultural diversity

- Rich with natural commodity such as coffee (4th world largest), cocoa (3rd largest) spice, palm sugar, wooden product, etc.
- In 2030, Indonesia will be home to an estimated **90 million additional consumers** with considerable spending power.
- Indonesia is expected to have **\$1.8 trillion** market opportunity in consumer services, agriculture and fisheries, resources, and education by 2030.
- Indonesian consumption is shifting from goods (non-leisure) to experience (leisure economy) (Head of Indonesia Statistic Bureau, 2017).

Indonesia: Strong GDP Performance

(in Trillion Rp)



Contribution of Creative Economy Sectors : 7.38 % of total GDP Indonesia (2015)



Yogyakarta: the city of ancient culture, creativity, digital savvy and promising tourism destination

- Rich on historical and traditional value.
- Known as the city of education with **117 academic institutions and universities**.
- Growing digital culture, with more than **190 digital start-ups**.
- City of creative industry like silver craft and cultural product (Batik).
- Amazing amount of tourism destination. **7.2 million passengers** have visited Yogyakarta in 2016.



Investment Opportunities in Lifestyle Industry



Developing Indonesia Culinary Potential

- A study by Nielsen showed that 11% of Indonesian citizens eat out at least once a day; this is higher than the global average of 9%.
- Culinary contributed to 41,69 % of Indonesia Creative Economy GDP
- Restaurant and Cafe are open for 100 % foreign ownership.



Unlocking Indonesia's Potential on Film Industry

- By 2030, Indonesia offer USD 105 billion in entertainment market
- 0.4 screen per 100,000 population, compared to China (1.8) and India (0.9).
- 87% of screens are located in Java Island. Only less than 15% of total regency/city in Indonesia has access to cinema.



Accelerating Indonesia's Digital Economy

- Promising market with 132,7 million users or 50.4% from total population.
- Growth of urban lifestyle, leading to the convenience of online shopping.
- People in Indonesia spend more time on the internet, 4.5 hours per day.



Seizing Opportunities in Lifestyle Commodities

- Coffee consumption (coffee-drinking-style) is growing, by an average of 8%.
- Indonesia is among top 5 global coffee producer and exporter. Having many best coffee beans in the world.
- Indonesia show the rise of demand for beauty and personal care product since the increasing of make-up as a part of woman lifestyle .
- Abundant natural resources including numerous varieties of timber, promising qualified labor, and hundred of SMEs are potentially for future furniture expansion on the rise of local and international demand.
- Global demand on furniture is expected to surpass US\$ 500 billion by 2024.
- Local demand on Muslim fashion is expanding



Unlocking Game Developer & Animation

- Indonesia is the second largest gaming market in Southeast Asia and 16th in the world with 43,7 million.
- Indonesia earned US\$ 879.7 million revenues from the industry.
- Global 3D animation market is increasing, expected to reach US\$ 26,8 billion by 2022, driven by growing of 3D animation technology.



Capturing Healthy Lifestyle Booming

- Wellness economy sectors is positioned to grow faster than global GDP sectors by 2020.
- Indonesia is among top 20 countries for spa and wellness tourism markets in 2015.
- Indonesian people are becoming more health-conscious, increasing the demand on healthier lifestyle products and services.

10 Priority Tourism Destination to be Developed



Lake Toba, North Sumatera

LAKE TOBA

The largest volcanic lake in the world

Lake Toba is the largest volcanic lake in the world and the second largest lake in the world after Victoria Lake in Africa. Lake Toba is one out of ten deepest lakes in the world, reaching around 500 meters depth. Samosir Island in the middle of Lake Toba has area of 64.000 hectares or equals to country of Singapore.

Investment Opportunities:

Sibisa Integrated Resort and its supporting amenities, basic infrastructure, techno-cultural performance, and railway projects, etc.

BOROBUDUR

world cultural masterpiece

Located on the island of Java, the magnificent Borobudur temple is in the world's biggest Budhist Monument, an ancient site widely considered to be the one of the World's Seven Wonders. Built in the 9th century during the reign of the Syailendra Dynasty, the temple sits majestically on a hilltop overlooking lush green fields and distant hills.

Investment Opportunities:

Development of tourism information center Pawon temple area, Street Mbudur Walk, Wanurejo Sightseing and Agrotourism, Bedah Menoreh, Progo riverside walk, etc.



Borobudur Temple, Central Java



Mandalika SEZ, West Nusa Tenggara

MANDALIKA SEZ

world's best halal tourism

Special Economic Zones (SEZ) Mandalika proposed by PT Indonesia Tourism Development Corporation (ITDC) which has been established by Government Regulation No. 52 of 2014 on June 30, 2014. Development of the SEZ Mandalika focused on the main activities of Tourism.

Investment Opportunities:

ITDC offers opportunities to invest into tourism related development opportunities and its supporting infrastructure, including hotels, resort, residential, amenities, golf course, race circuit, marina, entertainment destination and key infrastructure

TANJUNG LESUNG SEZ

gateway to adventure in west edge of java

Tanjung Lesung has the status of Special Economic Zone (SEZ) in tourism sector which is launched by the government of Indonesia in 2012 and officially operated in February 2015. SEZ Tanjung Lesung is managed by PT. Banten West Java, a subsidiary of PT. JABABEKA, Tbk which has more than 20 years experience in township and real estate development.

Investment Opportunities:

Tourism Resort, 1 to 5 star rated classified hotel, Tourism Consultant, Convention and exhibition center, Tour Operator, Restaurant, etc



Tanjung Lesung, West Java



Tanjung Kelayang, Bangka Belitung

TANJUNG KELAYANG SEZ

home of rainbow troops

"Laskar Pelangi" is a famous novel and film in Indonesia. Belitung Island becomes the background of this piece of art. Tanjung Kelayang Beach is not an exception. It is a popular destination for locals and foreigners. Set on March 15, 2016 Special Economic Zones (SEZ) Tanjung Kelayang is stipulated under Government Regulation No. 6 Year 2016, with the main focus on Tourism development.

Investment Opportunities:

Hotel and restaurant, Diving and snorkeling services, Golf course, Energy and electricity, Hospital, etc.

PULAU SERIBU

marine based eco-tourism

Pulau Seribu consist of almost 128 small island located in the Bay of Jakarta in the Java Sea. Most of these are inhabited and can be reach in about 1-2 hours from Marina Ancol by ferry or by chartered board. The surrounding reefs are home to a wide variety of fishes, making Thousand Island an ideal spot for diving, Snorkeling and fishing.

Investment Opportunities:

Some of the islands is this group developed for tourism are Pulau Bidadari, Pulau Anyer, Sepa, Pelangi, Bira, Pantara, Kul-kul and Pulau Putri. Investment opportunities including resort & mice, waterfront promenade, domestic cruise, and its supporting infrastructure.



Pulau Seribu, Jakarta



Bromo Tengger Semeru, East Java

BROMO - TENGGER - SEMERU

international geo-ecoculture park

Bromo Tengger Semeru National Parks covers a massive area of 800 square km in the centre of East Java, from which four new volcanic cones have emerged. This unique feature covers a total area of 5,250 hectares at an altitude of about 2,100 metres (6,900 ft). The massif also contains the highest mountain in Java, Mount Semeru (3,676 m), four lakes and 50 rivers. The area to be developed is including Lumajang, Malang, Pasuruan, and Probolinggo regency.

Investment Opportunities:

Gateway, Transport Hub Logistic, Business Park, Airport Hotel, Mixed Use Residential, MICE Resort, Exclusive Villa.

LABUAN BAJO

the gate of the world ecotourism in East Nusa Tenggara

The main tourist attraction of the West Manggarai Regency or even in the national level is the Komodo National Park. The Komodo National Park cover an area of 1,817 km² is the home of the world famous Komodo Dragon (*Varanus Komodoensis*) and serve as a conservation area for many other flora and fauna both on land and in the sea.

Investment Opportunities:

Integrated tourism area and its supporting infrastructure in Tananaga Ecotourism in cooperation with Flores Prosperindo with a total area of 2,000 Ha



Labuan Bajo, East Nusa Tenggara



Morotai, North Maluku

MOROTAI SEZ

window of East Asia

Special Economic Zones (SEZ) Morotai established by Government Regulation No. 50 of 2014 on June 30, 2014. The administration, KEK Morotai, located in the district of South Morotai, Morotai Island, North Maluku province. PT Jababeka Morotai as proposer KEK has been established as business entities Region Builders and business area of 1101.76 ha in Morotai Island.

Investment Opportunities:

Tourism (hospitality, resort, and MICE), Fish Processing, Logistics, Manufacturing

WAKATOBI

biodiversity, water sports, and cruise tourism

The main tourist attraction of the Wakatobi Regency is the Wakatobi National Park. The Wakatobi National Park is one of 50 National Parks in Indonesia, which is located in the Regency of Wakatobi, Southeast Sulawesi. Wakatobi has been designated in the World Network of Biosphere Reserves by the Man and the Biosphere Programme of the United Nations Educational, Scientific and Cultural Organization (UNESCO) on 11 July 2012.

Investment Opportunities:

Integrated tourism area and its supporting infrastructure including but not limited to area of Hoga Island, Melai One Village, and Payuno



Wakatobi, Southeast Sulawesi



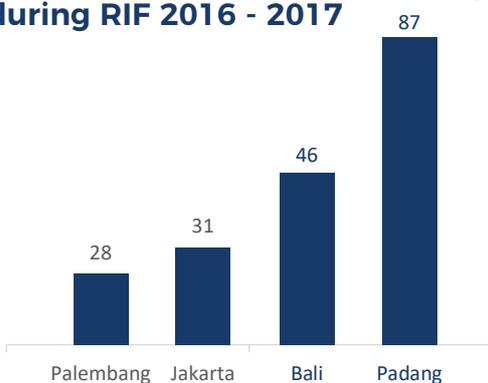
PARTICIPANTS

Ministers, Vice Ministers, Governor, Mayors, CEOs, Managing Directors, General Managers, Investors, entrepreneurs, business councils from:

-  Ministries and Government Departments
-  Chamber of Commerce & Industry, Business Councils
-  Banking and Financial Institutions
-  Regional Investment Agencies
-  Tourism and Economic Zones
-  Startups
-  Foreign and Domestic Investor

WHO ATTENDS

Total Business Meeting during RIF 2016 - 2017



AGENDA

DAY 1, Tuesday - 13 March

18.30 - 21.00	Welcome Dinner	Bangsals Pagelaran Keraton (Governor's House)
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DAY 2, Wednesday - 14 March

08.00 - 08.30	Registration	
08.30 - 08.35	Opening by MC	
08.35 - 08.45	Indonesian Anthem	
08.45 - 09.00	Welcoming Remarks by H.E. Sultan Hamengkubuwono X , Governor of Special Region of Yogyakarta	Amartapura Plenary Hall, Mataram International Convention Center The Alana Yogyakarta & Convention Center
09.00 - 09.25	Opening Remarks by H.E. Thomas Trikasih Lembong , Chairman of BKPM	
09.25 - 10.45	Panel Discussion Session I 1. H.E. Arief Yahya, Minister of Tourism "Policy Update on Tourism Industry" 2. H.E. Agus Martowardodjo, Governor Bank Indonesia "Indonesia Future Economic Outlook" 3. H.E. Thomas Trikasih Lembong, Chairman of BKPM "Investment Policy Reforms in Indonesia" 4. H.E. Triawan Munaf, Chairman of BEKRAF "Investment Opportunities in Lifestyle Industry" 5. H.E. Sultan Hamengkubuwono X, Governor of Special Region of Yogyakarta "Investment Opportunities in Yogyakarta"	
	Q&A	
10.45 - 12.30	Panel Discussion Session II 1. Mr. Hiramshyah S Thaib, Head of Task Force for 10 Tourism Destination Priority "Seizing the Opportunity in 10 Priority Tourism Destinations" 2. Mrs. Indah Juanita, President Director of Borobudur Tourism Authority Board "Investment Opportunities in Borobudur Integrated Tourism Area" 3. Mr. Edi Sukmoro, President Director of PT. Kereta Api Indonesia "National Railway Development Plans" 4. Mr. H.B.L. Mantiri, President Director of PT Mitra Adhi Perkasa. "Success Story of Starbucks Coffee and Lifestyle Business in Indonesia" 5. Director of PT. Gameloft Indonesia "Success Story of Game Development Business in Indonesia"	
	Q&A	
12.30 - 13.30	Lunch	
13.30 - 17.00	One-on-one business meeting	Arjuna, Gatot Kaca & Abimanyu Room

DAY 3, Thursday - 15 March

07.00 - 08.00	Registration	Meeting Point:
08.00 - 14.00	Site Visit to Borobudur Tourism Area and Kota Gede	Lobby Hyatt Regency Yogyakarta

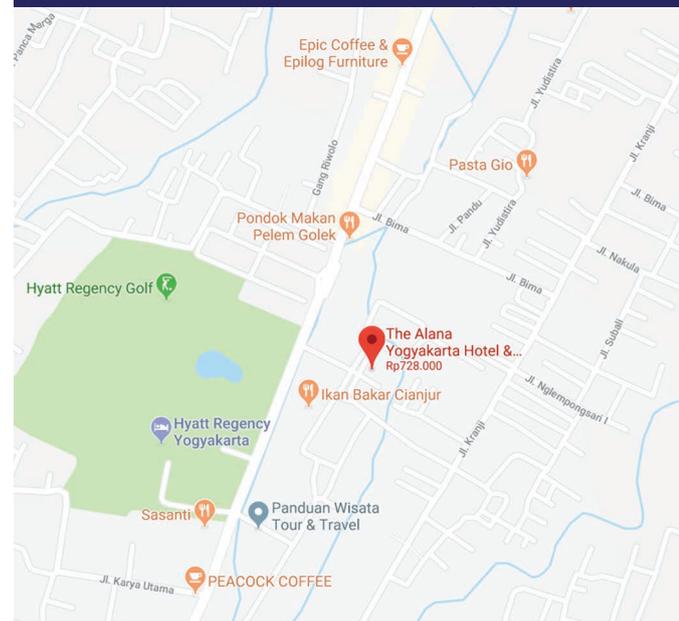
VENUE

Scan QR Code for
Google Map Location



The Alana Yogyakarta Hotel & Convention Center

Jl. Palagan Tentara Pelajar KM 7
Sleman Yogyakarta (55581)
Indonesia



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LET'S CONNECT

