

## COSMETICS

INDONESIAN COSMETICS  
IN THE WORLD MARKET

## What Inside

Indonesia is endowed with rich natural resources including various plants and herbs that can be made into traditional cosmetics. Indonesia has been long known for its traditional type of cosmetics and now is also known as a producer of good cosmetics products made of chemical substances. While the current trend still show small number of exports, long tradition in the industry will surely propell Indonesia to become major cosmetics exporters.

trade with  
**remarkable**  
**Indonesia**

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Dear Valued Readers

Welcome to the September 2012 edition of Export News which will reveal the potentials of Indonesian Cosmetics products under the Harmonized System (HS) code 3304. Indeed, the exports for this product category are still low when compared to Indonesia's more traditional commodities such as crude palm oil and its derivatives. However, with strong tradition in beauty-related products and ever growing middle class stoking up the economy, it is only a matter of time before Indonesia catches up as with the major Cosmetics exporting countries.

Indonesian Cosmetics products have been exported to more than 100 countries all over the world with Hong Kong, Thailand, Malaysia, Singapore, the Philippines, Chinese Taipei, Japan, the United States, the United Arab Emirates, Pakistan and Ghana making up the Top 10 destination countries in 2011.

A number of global Cosmetics brands have also made Indonesia their production hubs by setting up manufacturing plants. As Indonesia continues to show political stability and promising economic outlook, we can expect those plants will also serve export markets in addition to fulfilling huge domestic demands.

In this edition, we provide you with a review of export performance of Indonesian Cosmetics products as well as displaying a list of exporters. Overseas buyers are encouraged to contact the exporters directly and establish strong relations which will benefit all parties involved.

Finally, we hope you enjoy reading this edition as much as you like our Cosmetics products.

Thank you

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## *hot* issue

### Cosmetics *Product*

The word cosmetics is derived from the Greek words κοσμητική τέχνη (*kosmetikē tekhnē*), which means “technique of dress and ornament”, from κοσμητικός (*kosmētikos*), “skilled in ordering or arranging” and from κόσμος (*kosmos*), meaning amongst others “order” and “ornament”.

Mankind has been using cosmetics since ancient Egypt and Greece civilizations, as archeological evidences have shown. These included castor oil by ancient Egypt as a protective balm and skin creams made of beeswax, olive oil and rosewater as described by the Romans.



## Hot Issue

Cosmetics, also known as make-up, nowadays can be described as substances used to improve the appearance or odor of the human body. Cosmetics can be made of natural materials although currently many are made of chemical or synthetic compounds.

In the United States, the Food and Drug Administration (FDA) defines cosmetics as “intended to be applied to the human body for cleansing, beautifying, promoting attractiveness, or altering the appearance without affecting the body's structure or functions”. The FDA, however, excludes soap from this category.

Meanwhile, the Indonesian Health Ministry describes cosmetics as “materials or substances which are intended to be applied on the outer part of the human body (epidermis, hair, nail and outer genitalia) or teeth and mouth mucosa especially for cleansing, scenting, changing appearance and/or improving odor or protecting or maintaining body in good condition”.



PT Martina Berto

The cosmetics industry, despite its still low export value, is a quite important industry with some 760 companies employing about 575,000 workers. There are 75,000 workers in the production sector while the rest is in the marketing sector.





PT Martina Berto



BALI TANGI

Among the local major cosmetics producers are PT Mustika Ratu, PT Martina Berto and PT Ristra Indolab. These cosmetics makers also export their products to foreign markets. PT Mustika Ratu, for example, has Malaysia as its biggest export market

followed by Singapore and Brunei Darussalam. Meanwhile, PT Martina Berto began to export its products in 2008-2009 to Europe (Greece and Ukraine) and Asia (Japan, Hong Kong and Taiwan).

Not only local ones, Indonesia has also attracted foreign brands as well. The last one to make a significant investment was L'Oreal. The French brand plans to build a US\$50 million factory in Jababeka industrial city in Bekasi, West Java.

Built on a 200,000-square-meter plot of land, the factory is expected to produce 300 million cosmetic items per year and reaching more than 500 million units by 2015. A hundred million units would generate between Rp 2 trillion (US\$226 million) and Rp 3 trillion.

Only 25% of production from L'Oreal's largest factory in the world will be sold in Indonesia. Therefore, we can expect Indonesia's export of cosmetics products to increase considerably in the near future.



PT Mustika Ratu

# Product



# Indonesian cosmetics in the



# world market

Indonesia has been exporting, and importing as well, cosmetics product for some time although the figures are still considerably small. There are a number of Indonesian cosmetics brand that the public is familiar with.

In addition to local brands, foreign brands have also entered Indonesian market by establishing manufacturing plants considering the strong domestic market and potentials to make Indonesia as a production hub.

Cosmetics are grouped under the Harmonized System (HS) code 3304 and are divided into several sub groups which include:

3304991000	Face & skin creams & lotions
3304999000	Oth beauty/make-up prep & prep for the care of the skin (oth than medicants)
3304910000	Powders, whether or not compressed
3304200000	Eye make-up preparations
3304100000	Lip make-up preparations
3304300000	Manicure or pedicure preparation
3304992000	Anti-acne creams

Indonesia exported US\$112.85 million worth of goods under the HS 3304. The Top 3 most exported products are those listed under the Face and skin creams and lotions with US\$48.27 million, almost half of the total export at 42.78%; Other

beauty/make-up prep and prep for the care of the skin (other than medicants) were second most exported products with US\$38.05 million (33.72%) followed by Powders, whether or not compressed at US\$17.09 million (15.14%).

# Market Review

## WORLD EXPORTS

The export and import of cosmetics in the world have shown strong growth in the 2007-2011 period with an average growth of 6.94% and 5.53% respectively while the year-on-year growth between 2010 and 2011 is 15.42% and 13.69% respectively. It seems that the prolonged global financial crisis has little effect in the sales of cosmetics.

The world exported US\$23.39 billion worth of cosmetics in 2007 and US\$26.48 billion in 2008. There was a slight decrease in 2009 when effects of the global financial crisis were felt with exports stood at US\$24.10 billion which was still higher than the exports figure in 2007. Export rebounded in 2010 with US\$27.71 billion.

The Top 5 exporting countries in 2011 were France with US\$7.06 billion for a market share of 22.07% and followed by the United States in the distant second with US\$3.32 billion (10.39%). Germany was at the third place with US\$3.05 billion with a market share of 9.54% followed by Singapore with US\$1.79 billion (5.62%) and the United Kingdom with US\$1.77 billion (5.55%).

Meanwhile, Indonesia was only at the 30th position, exporting US\$112.85 million for a market share of 0.35% and become the 3rd largest exporter among ASEAN member states. Thailand was second, the world's No. 16, exporting US\$413.54 million for a market share of 1.29% while Malaysia was fourth,



world's No. 31, with an export of US\$112.50 million (0.35%).

Among the Top 15 producers, Asian exporters enjoyed positive growth despite the global financial crisis in 2008 and 2009. Singapore's export grew from US\$710.42 million to US\$769.48 million while Japan from US\$884.59 million to US\$968.43 million, China from US\$755.82 million to US\$768.03 million and South Korea from US\$314.91 million to US\$373.02 million. Hong Kong, however, experienced a tougher time with export dwindling slightly from US\$386.50 million to US\$374.32 million.

### Export of Beauty, make-up & skin-care prep, manicure etc prp To WORLD by Country Destination

Sources : ITC calculations based on UN COMTRADE statistics.

No	Countries	Exported value (US Dollar thousand)					Trend % (07-11)	Growth % (10-11)	Share % (2011)
		2007	2008	2009	2010	2011			
	All Countries	23,398,787	26,482,565	24,105,701	27,714,700	31,987,840	6.94	15.42	100
1	France	5,614,640	6,508,107	5,532,695	6,047,313	7,060,471	3.92	16.75	22.07
2	United States of America	2,666,729	3,013,776	2,778,512	3,102,859	3,323,460	4.81	7.11	10.39
3	Germany	2,676,492	3,040,185	2,643,749	2,724,146	3,050,531	1.53	11.98	9.54
4	Singapore	709,954	710,427	769,482	1,214,079	1,796,241	27.03	47.95	5.62
5	United Kingdom	1,692,369	1,707,264	1,403,240	1,545,105	1,774,261	-0.05	14.83	5.55
6	Belgium	669,313	773,198	755,913	1,025,320	1,403,590	19.28	36.89	4.39
7	Japan	698,840	884,597	968,435	1,215,940	1,362,044	17.97	12.02	4.26
8	Italy	1,188,594	1,270,667	1,033,502	1,139,754	1,295,508	0.64	13.67	4.05
9	China	732,656	755,822	768,034	1,009,563	1,222,696	14.04	21.11	3.82
10	Poland	714,129	994,329	911,377	1,080,390	1,104,494	10.02	2.23	3.45
11	Canada	662,299	700,423	619,122	721,132	817,112	4.60	13.31	2.55
12	Hong Kong, China	320,986	386,509	374,324	545,358	732,360	22.07	34.29	2.29
13	Republic of Korea	261,718	314,912	373,022	698,614	686,543	31.33	-1.73	2.15
14	Spain	492,209	547,021	490,744	617,430	677,819	7.91	9.78	2.12
15	Switzerland	389,006	463,292	457,743	490,200	555,077	7.98	13.23	1.74



Among the ASEAN member states outside the World's Top 15, only Indonesia enjoyed a positive growth in the 2008-2009 period, from US\$71.94 million to US\$81.06 million. Malaysia experienced quite a drop from US\$96.08 million to US\$88.72 million while Thailand only had a slight drop from US\$257.51 million to US\$256.89 million.

Indonesia exported its cosmetics to well over 100 countries in 2011. The Top 10 destination countries were Hong Kong, Thailand, Malaysia, Singapore, the Philippines, Chinese Taipei, Japan, the United States, the United Arab Emirates, Pakistan and Ghana.

Exports to Hong Kong worth US\$22.67 million and made up 20.09% of Indonesia's export in 2011 followed by export to Thailand at US\$17.64 million (15.64 million), Malaysia US\$14.90 million (13.21%), Singapore US\$11.72 million (10.39%) and the Philippines US\$9.33 million (8.27%).

Indonesia has shown strong performance with an average trend of 21.57% in the 2007-2011 period. The export was US\$49.24 million in 2007 before skyrocketing to US\$71.94 million the following year. The figure kept increasing in 2009 despite the global financial crisis to US\$96.57 million in 2010 and to US\$112.85 million in 2011 for a 16.85% year-on-year growth.

## WORLD IMPORTS

The world imports have also shown similar pattern with the export figures, getting stronger every year. Imports have grown from US\$23.34 billion in 2007 to US\$30.35 billion in 2011 for an average growth of 5.53% in the 2007-2011 period. The value was increased to US\$26.34 billion in 2008 before dropped slightly in 2009 to US\$2.69 billion, still larger than the figure in 2007. The imports rebound in 2010 with US\$26.70 billion, also higher than the pre-crisis figure in 2008.

The United States imported the most in 2011 with US\$2.60 billion for a market share of 8.58% followed by the United Kingdom with US\$1.98 billion (6.54%) and Hong Kong with US\$1.90 billion (6.27%). Germany was fourth with US\$1.86 billion (6.15%) and Russia was fifth with US\$1.18 billion (3.89%).

Meanwhile, Indonesia imported cosmetics worth US\$110.43 million for a market share of 0.36%, standing at the 43<sup>rd</sup> position. Most of Indonesia's imports came from Thailand with US\$40.73 million or 36.89% of the total imports. Coming in distant second was the United States with US\$12.14 million (11%) while Japan was third with US\$7.89 million (7.15%). The fourth largest import source in 2011 was Malaysia with US\$6.95 million (6.30%) while the United Kingdom was fifth with US\$6.91 million (6.26%).

### Import of Beauty, make-up & skin-care prep, manicure etc prp from WORLD by Country of Origin

Sources : ITC calculations based on UN COMTRADE statistics.

No	Countries	Imported value (US Dollar thousand)					Trend % (07-11)	Growth % (10-11)	Share % (2011)
		2007	2008	2009	2010	2011			
	All Countries	23,348,365	26,345,630	23,694,568	26,703,807	30,359,023	5.53	13.69	100
1	United States of America	2,144,896	2,228,424	1,919,108	2,220,516	2,605,849	3.93	17.35	8.58
2	United Kingdom	1,874,113	1,956,284	1,721,055	1,894,325	1,985,294	0.83	4.80	6.54
3	Hong Kong, China	877,827	1,069,534	1,082,398	1,426,333	1,904,681	20.17	33.54	6.27
4	Germany	1,555,700	1,792,305	1,591,741	1,679,934	1,865,904	3.03	11.07	6.15
5	Russian Federation	813,445	1,020,503	866,192	1,096,302	1,180,828	8.51	7.71	3.89
6	Singapore	607,137	730,548	706,715	905,516	1,179,506	16.68	30.26	3.89
7	France	1,029,490	1,130,550	979,803	1,030,404	1,141,395	1.14	10.77	3.76
8	China	355,154	566,502	603,505	806,460	1,071,838	29.21	32.91	3.53
9	Japan	861,189	994,927	919,068	994,911	1,064,695	4.33	7.01	3.51
10	Canada	857,663	899,758	872,492	994,832	1,054,104	5.26	5.96	3.47
11	Italy	903,930	1,000,502	855,606	918,645	1,009,614	1.37	9.90	3.33
12	Republic of Korea	531,115	597,551	602,234	760,630	862,728	12.88	13.42	2.84
13	Spain	807,429	844,934	687,343	756,113	831,501	-0.52	9.97	2.74
14	Belgium	633,420	728,667	686,687	729,205	826,444	5.47	13.33	2.72
15	Chinese Taipei	565,654	607,681	614,886	670,642	744,135	6.68	10.96	2.45

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