

INDONESIA'S FRAGRANT, REFRESHING BATH SOAP



What's Inside

Being the world's largest producer of crude palm oil, Indonesia has a significant soap industry including those producing bath soaps. The products are consumed not only locally but also exported to various countries. Some companies even have their own subsidiaries or units to handle the entire process from plantation to manufacturing the end products.

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Dear Valued Readers,

As we are reaching June, we hope you have nearly reached your targets for the first half of this year and are ready to score another stellar achievement for the rest of the year. To end the first semester, the Directorate General National for Export Development (DGNED), Ministry of Trade, Republic of Indonesia, brings you bath soap in this June edition of Export News.

Indonesia has a number of experienced companies producing such products and some of them have sophisticated technology to process and manufacture the product.

In the global market, Indonesia has a significant growth trend in the 2007-2011 period with an average annual growth rate of 55.56%. Singapore was the main destination of the perfume's export in that period.

This edition features Indonesian perfume and eau de toilette industry including its export performance in the past years and various products. We also include the list of exporters complete with addresses and contact persons so that an immediate communication can be established for a profitable deal.

We expect that this edition of Export News will provide you with all the necessary information to grasp business opportunities in this promising year.

Thank You

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hot issue

Bathing soap has become a daily necessity for us to keep our bodies fresh to start a day anew or after a long day full with activities. Currently there are so many options of bathing soap with various scents and other special properties such as containing milk, conditioner, perfume or aromatherapy.

Technically speaking, soap is a combination of animal fat or plant oil and caustic soda. When dissolved in water, it breaks dirt away from surfaces. Through the ages soap has been used to cleanse, to cure skin sores, to dye hair, and as a salve or skin ointment. But today we generally use soap as a cleanser or perfume.



The exact origin of soap is unknown although Roman sources claim it dates back to at least 600 B.C., when Phoenicians prepared it from goat's tallow and wood ash. Soap was also made by the Celts, ancient inhabitants of Britain. Soap was used widely throughout the Roman empire, primarily as a medicine. Mention of soap as a cleanser did not appear until the 2nd century AD. By the 8th century, soap was common in France, Italy, and Spain, but it was rarely used in the rest of Europe until as late as the 17th century.


Soap manufacturing began in England around the end of the 12th century. Soap makers had to pay a heavy tax on all soaps they produced. Tax collectors locked the lids of soap boiling pans every night to prevent illegal soap manufacture. Because of the high tax, soap was a luxury item, and it did not come into common use in England until after the tax was repealed in 1853. In the 19th century, soap was affordable and popular throughout Europe.

Early soap manufacturers simply boiled a solution of wood ash and animal fat. A foam substance formed at the top of the pot. When cooled, it hardened into soap. Around 1790, French soapmaker Nicolas Leblanc developed a method of extracting caustic soda (sodium hydroxide) from common table salt (sodium chloride), replacing the wood ash element of soap. French chemist Eugene-Michel Chevreul put the soap-forming process, or saponification, into concrete chemical terms in 1823. In saponification, animal fat, which is chemically neutral, splits into fatty acids, which react with alkali carbonates to form soap, leaving glycerin as a byproduct. Soap was made with industrial processes by the end of the 19th century, although people in rural areas, such as the pioneers in the western United States, continued to make soap at home.





Bath Soap **INDUSTRY** **In Indonesia**



With a population of around 251.85 million in 2012, Indonesia provides a potential market for toiletries including bath soap. The types of bath-soap found in the market include bath and toilet soap and medicated and disinfectant soap.

Bath-soap industry has expanded in Indonesia since the 1980s and the expansion has been fast with the availability of abundant crude palm oil (CPO) as raw material. The expansion of the bath-soap industry is shown in the production capacity that surged to 883,000 tons in 2009 from 690,000 tons in 2005. The country's production of bath soap has increased from year to year from 613,000 tons in 2005 to 855,000 tons in 2009.

Indonesia has exported part of its bath-soap production though relatively small in quantity. Exports of bath-soap totaled 230,000 tons valued at US\$165,000 in 2005, up to 406,000 tons valued at US\$450,000 in 2009.

Market Review

In the past, Indonesians knew only PT. Unilever as a major producer of bath-soap in the country with its popular brand Lux. Lux bath soap dominated the market for a number of decades in Indonesia before new products from other producers entered the market.

Production capacity

The huge number of population and better economic condition in Indonesia have enticed bath soap makers to increase their production both for domestic as well as export markets. The country's bath soap production capacity increased sharply from 630,000 tons per year in the 2005-2007 period to 883,000 tons a year in 2008 and 2009. Production was up 9.1% per year in average.

Most of the producers of bath soaps are located in West Java and East Java.

The types of bath soap which are produced include bath and toilet soap and medicated and disinfectant soap. The production of bath and toilet soap

accounts for 86% of Indonesia's total production of bath soap, dominating the market. The remaining 14% is for medicated and disinfectant soap.

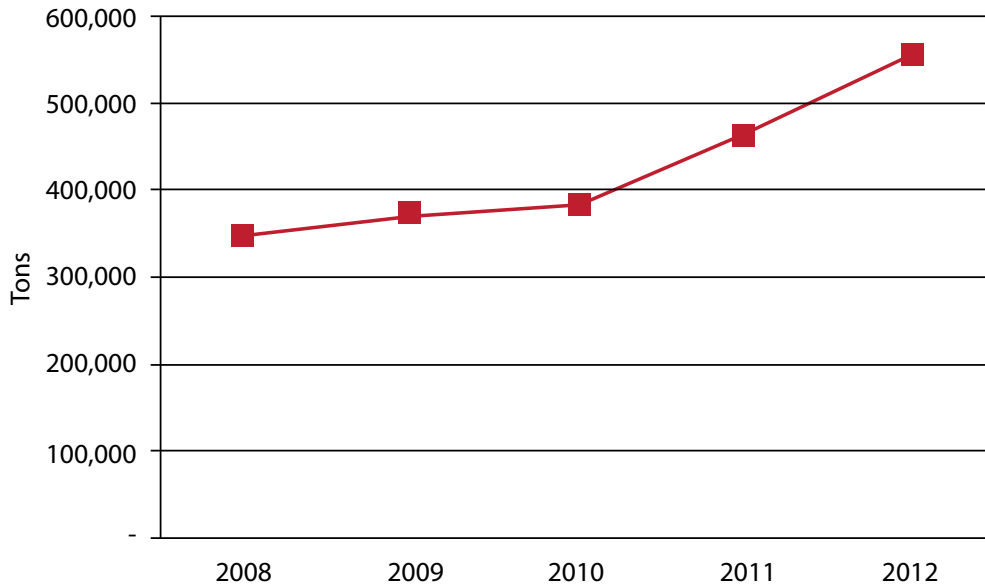
Increased capacity utilization

The increased production capacity was also followed by increased capacity utilization. Indonesia's production of bath soap grew 9.1% per year in average in the 2005- 2009 period. In 2005, the production was recorded at 613,000 tons or 88.8 % of the production and increased to 855,000 tons in 2009. In 2010, the production was estimated to have reached 940,000 tons and further rose to an estimated 1.053 million tons in 2011.

In 2005, the production of 613,000 tons made up a 88.8% of the production capacity. The figure rose to 625,000 tons or 90.6% in 2006 and further increased to 663,000 tons (96.1%) in 2007. By 2008 and 2009, the capacity utilization reached 94.9% and 96.8% in 2008 and 2009 respectively.



Indonesian Soap (HS 3401) Export to World



Exports up

Mirroring the increased production capacity and capacity utilization, exports of bath soap grew by an average of 16.77% between 2008 and 2012. Export rose from 346,374 tons to 635,657 tons in 2008.

Currently, Indonesia exports some some 45 bath soap products under brands such as GIV, NUVO, Harmony, Leather (Gold and Classic), Royal Premium, Fres, Lark, Lervia, Anita and Santax.

Bath soap has been exported to various countries, mainly African countries. According to the Trade Ministry, in 2012, exports to African countries made up 41.96% of Indonesia's total exports.

PT Unilever Tbk, the country's largest producer of bath soap, started exporting bath soap to Africa in May 2010. It exported Lux bath soap to Ghana and the Ivory Coast on request of the Unilever branch in Africa.

Other bath soap exporters include PT Sayap Mas Utama of the Wings Group exporting bath soap to a number of countries including the Philippines and Nigeria.

PT. Megasurya Mas (PT. MSM) exported bath soap with the brands of Harmony and Lervia to various countries. The company's export continued to increase in value growing 29.19% a year in the past five years. Its main countries of destination are India (28.48%), followed by Panama (13.55%) and Pakistan (6.12%).

Imports of bath-soap

While being an exporter of bath soap, Indonesia also imports bath soap but relatively small in volume and limited to certain types of soap such as the ones having aromatherapy.

PT. Procter&Gamble Home Indonesia sells bath-soap imported from its sister company Procter&Gamble in the Philippines.

In 2006, imports of bath-soap totaled 6,000 tons, up from 5,000 tons in 2005. In 2007 and 2008 imports of bath-soap fell to 4,000 tons a year, before rising to 6,000 tons in 2009.

MARKET SIZE

Domestic consumption of bath soap is supplied almost entirely by local producers with imports being almost insignificant. Domestic consumption could be assumed as equivalent to domestic supply or production plus imports minus exports.

In the period of 2005-2009, consumption of bath soap grew 5.6% per year on the average. In 2005, the domestic consumption of bath soap was recorded at 387,000 tons before increasing to 455,000 tons in 2009. In 2010, consumption of bath soap was estimated to rise to 478,000 tons and further increase in 2011 to 504,000 tons.

BIG PLAYERS

- **PT. Unilever Tbk**

PT Unilever Tbk started operation in Indonesia in 1933. Currently Unilever has two factories located in Cikarang, West Java and Surabaya, East Java. The products of Unilever include personal care, home toiletries, foods, nutrition, health & beauty care.

Unilever produces the popular Lux bath soap which dominates the Indonesian soap market. Lux is used by middle and upper class consumers. Later Unilever launched new bath soap brands including Dove and Citra. The company then introduced the liquid forms of Lux, Lifebuoy, Dove and Citra.

Unilever is estimated to contribute 40% or 342,000 tons to the country's total production of bath soap. The company sells 95% of its production on the domestic market and exports the remaining 5%.



- **PT. Sayap Mas Utama**

The company belongs to the Wings Group with parent company Fa Wing, which was established in 1948 in Surabaya, East Java. In 1991 the name of the company was changed to PT. Wing Surya. The Wings Group started operation by producing green laundry soap manually under the brand of Ekonomi. Ekonomi succeeded in entering the market in late the 1940s. Later the Wings Group launched new products detergent cream and bath soap with the brand of Wings.

The business flourished and the company group expanded by establishing PT. Sayap Mas Utama (PT. SMU) with factory in Jakarta producing toiletries, bath soap and face powder as well as detergent, floor cleaner, fabric softener and sanitary napkins sold all over the country. PT. SMU started by producing GIV bath soap and later also produced Nuvo medicated soap.

The Wings Group produces various types of household cleansing products from toothpaste and shampoo to detergent and porcelain cleanser. The products are sold under the brands of Ekonomi, Daia, SoKlin, and GIV.

- **PT Megasurya Mas**

PT Megasurya Mas (MSM) was established in 1992 in Surabaya, East Java producing bath soap, margarine and cooking oil. The company products include bath soap under the brands of Lervia and Harmony, Medicare medicated soap and SunCo cooking oil.

Around 70% of perfume needed by PT. MSM is supplied by the Symrise Group from Germany. Currently 64% of its production is exported. PT. MSM has secured a number of certificates including Certificate of GMP in Iran, ISO 9001 (2000), ISO 14001 (1996), HACCP and GMP.



PT MSM produces soap with fruit scent under the brand of Harmony and Lervia Milk Soap. Now Harmony has become a global brand as the first bath soap emitting fruit scent. In 2000 PT MSM already succeeded in exporting its products to 118 countries including the Middle East, Ghana, Nigeria, Japan, South Korea, Taiwan India, Australia, Europe, Canada, Argentina, Brazil, Peru, and Colombia.

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