

FOOTWEAR

Keeps growing after the new policy of regional minimum wage



What's Inside

The Indonesian footwear industry has been around for some four decades. Just like like other sectors, the footwear industry has its share of ups and downs. After 40 years, however, Indonesian footwear industry is getting stronger than ever and has become one of the flagship industries in the country.

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Dear Valued Readers,

We have just passed the first quarter of 2013. Every second, many things happen including in the economic sector. The dynamic situation in the global market is almost inevitably influences government policies in almost all countries. One of the issues, which is likely to trigger workers' unrest, is remuneration system. The unstable economic situation could impact production performance at the domestic level and export performance at the international level. The new regional minimum wages (UMR), for example, can affect the development of Indonesian footwear industry, which is the focus of this April edition of Export News.

The new UMR was determined in 2012, however, just like other policies, some parties seem unsatisfied or disagree with the implementation. Therefore, we discuss the consequences of the new UMR on Indonesian footwear industry. The consequences are specifically in relation to the Indonesian investment level and export performance.

We also describe the development of footwear industry in Indonesia since its beginning in the 1970s, then the milestone in 1980s until the latest improvement after more than four decades. The significant development of Indonesian footwear industry is illustrated by the data obtained from BPS–Statistics Indonesia, UN COMTRADE and the Portuguese Footwear, Components and Leather Good Manufacturers Association (APICCAPS).

In summary, the data collected show that Indonesia is one of the biggest footwear producers, either in Asia or in the world. The dynamic situation, which affects the efforts to enhance this sector, is customarily and could happen in other sectors and in different nations. The role of the government, particularly the Directorate General for National Export Development – Ministry of Trade, is to keep educating and encouraging local exporters to continuously create products with innovations and added values, assisting them to enter potential markets abroad, and also provide accurate information for foreign buyers and investors.

Thank You

In *this* issue



From the Editor's Desk	2
Hot Issue	3
Market Review: Indonesian Footwear: Significant Development of Over 40 Years	5
List of Exporters	10
Commercial Attaches	11
Indonesian Trade Promotion Center (ITPC)	12

hot issue

New Policy of Regional Minimum Wages:

Positively Influences Footwear Industry

Since the second semester of 2012, the development of Indonesian footwear industry is influenced by a new policy which set a new regional minimum wages (UMR) for workers including in the footwear sector.

According to some business players, the new policy has impacted the production cost which eventually affected the targeted production number and price. However, the Indonesian export performance in



2012 does not seem to be affected by the wage issue.

The data from BPS—Statistics Indonesia exhibits an increase in total export value, from US\$398.63 million in 2010 to US\$527.17 million in 2011. The Portuguese Footwear, Components and Leather Good Manufacturers Association (APICCAPS) gives even a more encouraging figures with the value of Indonesian footwear exports rose from US\$3.3 billion in 2011 to US\$3.5 billion in 2012.

The issue of minimum wage still exists among business owners and workers in the footwear industry in the first quarter of 2013. Some entrepreneurs in the sector still disagree with the new UMR. Nevertheless, the Indonesian government keeps convincing all stakeholders, including local producers and international buyers, that the new UMR is set to improve the footwear industry. Before setting the new UMR, the government, with assistance from relevant experts, have conducted research to formulate the new wage.

Beside the effect on domestic production, the new UMR also influences foreign investments in footwear sector. Some parties predicted that the investment level would decrease due to the new wage. On the contrary, data from the Indonesian Investment Coordinating Board (BKPM) shows a rising trend of the number of investment projects in Indonesia, in the sector of leather goods and footwear industry. In 2012, there were 73 investment projects, which means there was an increase by 14 projects in comparison to 2011.

In practice, a major footwear company, Nike, has committed to select Indonesia as the biggest production hub in the world. Jeff Perkins, president director of Nike Indonesia, said his company was very satisfied with the profits of its investment in Indonesia. During its existence in Indonesia, Nike employs some 175,000 local workers and builds co-operations with 38 manufacturing companies. With such significant results gained in Indonesia, Nike plans to increase its investment in 2013.

The additional investment will be realized on the condition that there is a certainty related the remuneration policy. Nike Indonesia expects the Indonesian government shortly arranges long-term labor remuneration, so that it can accurately calculate the investment program in Indonesia. Since Indonesian workers are considered to be more when compared to workers in other countries, Nike Indonesia believes its decision to select Indonesia as the largest production base is appropriate.

Basically, this condition also benefits the Indonesian government in terms of export performance. Approximately 98% of total production is allocated for export purpose with the remaining 2% is slated for domestic consumption. That is why, the Nike's export contribution in 2012 reached US\$1,5 billion. As well as other foreign investors, Indonesian government and related association also urge foreign investors to provide work opportunities and possibilities for local manufacturers. This requirement is applied to enable transfer of technology and give added values for Indonesian footwear industry.

Briefly, footwear is one of Indonesian best commodities. During four years, this export values grew by 20%. Moreover, this sector grew 47% last year. This significant achievement has led to a surplus on balance sheet for footwear international trade. The main role of the Indonesian government is to establish regulations that underpin the sector to grow higher such as the new regional minimum wage. For local producers, their role is to create products that have added values to make them possible to compete in the global market. Undeniably, footwear industry has become more attractive for foreign investors to expand their businesses in Indonesia to gain great advantages.

Indonesian Footwear:

Significant Development of Over 40 Years

Indonesia's Footwear Export Performance

In the five-year period from 2007 to 2011, Indonesia was included in the world's Top 10 footwear producers. In 2007 and 2008, Indonesia was ranked in No. 10 in the global before stepping up a notch to No. 9 by surpassing France starting from 2009. In the period, the export of Indonesian footwear grew with an annual average of 26.05% from 199.22 million in 2007 to US\$527.17 million in 2011, according to the data from UN COMTRADE Statistics.

In the first 11 months of 2012, Indonesian export was even higher at US\$594.94 million, when compared to US\$462.02 million in the same period in 2011 with a growth of 28.77%. The figure until November 2012 was even much higher than full year export figure in 2011 of US\$398.63 million.

Another source of data, the World Footwear 2012 Yearbook, which was initiated by the Portuguese Footwear, Components and Leather Good Manufacturers Association (APICCAPS), exhibits a different data collection. In 2011, Indonesia exported US\$3.23 billion worth of footwear

products. This makes Indonesia to rank No. 7 in the world's top footwear exporters behind China, Italy, Hong Kong, Vietnam, Germany and Belgium. In Asia, the world's largest continent producer of footwear, Indonesia ranked No. 4 after China, Hong Kong and Vietnam.

The yearbook also reveals that Indonesia exported US\$3.5 billion of footwear products in 2012, an increase of 6% when compared to the export figure in 2011.

Despite the discrepancies in export figures, both data from BPS – Statistics Indonesia and the World Footwear 2012 Yearbook showed that Indonesian footwear industry has been growing steadily and continuously in the past years.

The significant increase of footwear industry in Indonesia was initially influenced by the Indonesian government policy to attract foreign investment in footwear production for export purpose in the early 1980s. Moreover, the government also underpinned the development of this industrial

World Export of Footwear

No	Countries	Exported value (US Dollar thousand)				
		2007	2008	2009	2010	2011
1	China	3,480,640	3,997,712	4,164,021	5,684,917	7,219,512
2	Viet Nam	996,426	1,224,000	1,085,820	1,493,769	2,118,630
3	Belgium	624,153	737,726	777,584	807,380	972,511
4	Italy	581,614	632,805	519,374	632,536	770,129
5	Germany	364,695	444,967	402,586	461,787	700,660
6	Hong Kong, China	399,158	493,123	472,031	540,571	586,444
7	Netherlands	264,607	305,635	404,988	459,507	585,268
8	Spain	304,081	384,669	398,899	424,782	528,165
9	Indonesia	199,227	275,585	297,847	398,639	527,177
10	France	268,314	292,628	273,921	332,978	440,452

Indonesian Export of Footwear to the World (Outer Sole Rub, Plastic or Lea & Upper Textile)

NO.	COUNTRY	2008	2009	2010	2011	2012
		(US\$ 000)				
1	United State	66,094	69,229	88,575	96,559	143,819
2	Japan	23,293	23,705	34,166	43,392	64,397
3	Netherlands	12,711	13,711	30,216	51,619	46,329
4	Belgium	46,108	50,794	40,186	30,620	43,628
5	Italy	20,946	19,615	24,378	38,579	33,551
6	Brazil	3,151	4,544	11,399	21,369	32,980
7	Germany	13,543	11,735	17,050	23,183	29,508
8	France	12,304	11,482	22,733	27,130	27,049
9	Mexico	18,450	13,339	26,058	23,969	25,436
10	United Kingdom	6,658	16,948	19,399	17,737	24,032
11	China	6,932	9,336	10,047	12,845	22,094
12	Panama	3,501	3,309	6,541	13,956	18,267
13	Republic of Korea	4,240	5,336	6,754	12,128	17,099
14	South Africa	2,782	4,942	3,167	7,331	12,929
15	Australia	1,801	2,124	4,328	8,755	11,778
16	Canada	2,121	3,459	5,773	7,588	11,684
17	Denmark	688	1,017	2,516	9,869	10,041
18	Spain	2,953	3,183	7,564	10,338	9,751
19	Russian Federation	726	858	1,175	6,303	8,721
20	Chile	2,358	3,397	3,187	5,213	7,817

sector by maintaining political stabilization, so that it could create conducive situation for the footwear industry to grow. In addition to footwear industry, other supporting sectors were also influential to the growth of footwear industry and export performance. Appreciably, this condition has resulted to more efficient production cost and also boosted the production target as requested by foreign buyers.

the export destinations of Indonesian footwear products were still dominated by major countries or the traditional market countries. There are only 6 out of 20 countries which were classified as emerging markets or non-traditional countries: Brazil, Mexico, Panama, South Africa, Russia and Chile. The existence of Indonesia footwear products in a particular country is expected to open new opportunities to enter the markets

in the surrounding countries. For example, Indonesian exports to Brazil can assist the entry to other markets in the Latin America region such as Ecuador, Colombia, Paraguay, Peru and Uruguay.

The non-traditional markets are the countries which provide export opportunities that have never been explored before, or have just been under-utilized. Previously, Indonesian exporters mostly focused on developed countries or traditional markets as their export destinations such as the United States, the European Union and Japan. Due to the impact of global economic recession, the chairman of the National Executive Board of the Indonesian Footwear Association (Aprisindo), Eddy Widjanarko, recommended that Indonesian exporters to enter and grab new opportunities in the non-traditional markets.

The recommendation is in accordance with the policy of the Indonesia Trade Ministry to implement new strategies in countries not suffering from the recession. Since the global recession hits major countries, the purchasing power of their citizens indicates a decreasing trend. In other words, the capability of the nation to import products from

overseas also goes down. However, traditional markets still offer opportunities and economic benefits. Therefore, the Indonesian government still urges the exporters to build trade relations with the major countries, while at the same time pay more attentions to the emerging markets in the non-traditional countries.

Indonesian Footwear Industry

A trade analysis on Indonesian footwear industry describes the main primary factors, which underpinned the success of the Indonesian footwear industry: the surrounding situations or environment, demands, others supporting industries, strategy and trade structure, government policies and also the opportunities and trade potentials for the products to grow in domestic markets. On the other hand, there are also several players who influence the efforts to enhance products' competitiveness: government, business owners, suppliers, associations, financial institutions (banks) and competitors' standardization agencies.

Furthermore, Indonesia also has three alternative strategies implemented in order to boost competitiveness consisting of technology mastery, the creation of effective business situation and the use of domestic raw materials to reduce production costs. As a result, Indonesia is now listed in the world's Big 10 footwear producers and the Big 5 in Asia. Therefore, this industry can keep growing since its beginning in the 1970s.

Beside the success in reaching high export performance, some of Indonesian business players in the footwear industry have also been awarded in international competitions. For example, five shoe

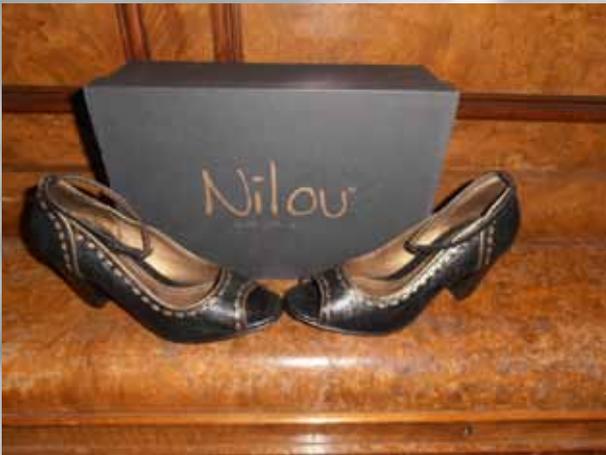
designers from three different companies were acknowledged as the winners in the International Footwear Design Competition (IFDC) in Guangzhou, China in 2012. There were 119 footwear designs registered coming from 12 countries. Through a selection process, five from 29 designs created by Indonesian participants were announced as the winners.

To further encourage the local footwear industry, Aprisindo has signed a Memorandum of Understanding (MoU) with the Malaysia Footwear Manufacturer Association (MFMA) during the Indo Leather and Footwear (ILF) exhibition which took place at the Jakarta International Expo (JIExpo) in 2012. This cooperation was established in order to develop and strengthen trade relations between both countries. In practice, the MoU was signed to enhance investments in footwear sector in both Indonesia and Malaysia by regularly organize meetings to share information and build effective communication with the purpose of sharing experiences and strategies in overcoming further challenges in the global industry. The MoU, which aims to eliminate barriers in entering footwear markets in both nations, is valid for two years and can be extended for another two years.

NAME OF DESIGNERS	DESIGN TITLES	CATEGORIES	COMPANIES
Hariyadi	Sandals in Shoes	Men shoes	PT. Sumber Kreasi Fumiko
Hariyadi	You are what you think	Female moccasin	PT. Sumber Kreasi Fumiko
Felix L, Yulianto, M. Triangga	Root	Sport shoes	PT. Tri Tunggal Bangun Sejahtera
Eko Wahono	Shrimp sandal	Women shoes	BPIPI
Eko Wahono	Mountains	Women shoes	BPIPI

Success Story:

NI LOU



Ni Lou is a brand of footwear product which is specializing in women's high heels. It is created by Ni Luh Djelantik from Bali. Previously, Ni Luh produced shoes based on her personal experiences when she could not get shoes that suited her feet. Therefore, in 2003, with her partner from France who also was also passionate on shoes, Ni Luh established a footwear business in Bali. Unfortunately, her first attempt went bankrupt. She then commenced her own business by opening an undecorated outlet where there were only three pairs of shoes being displayed. Due to limited budget, at that time Ni Luh produced shoes only by order. As time goes by, Ni Luh had the confidence to apply for a bank loan to enlarge her business by labeling her outlet with Ni Lou brand which was derived from her own name.

Ni Luh's is undoubtedly creative which could be seen when she was offered to co-operate with Topshop, a famous outlet from the United Kingdom, which planned to expand its business outside Europe, in 2004. This cooperation certainly gave Ni Luh an opportunity to enter the European market. Moreover, on another day in the same year, a female Australian consumer visited Ni Luh's outlet and was very impressed with the shoes.

The consumer offered a cooperation to be Ni Lou's distributor Down Under. Nowadays, Ni Luh's footwear business produces 200 pairs of shoes each month.

However, Ni Luh admits that there are still foreign buyers or consumers who underestimate the quality of Indonesia shoes. This reality does not put Ni Luh down. On the contrary, she is motivated to keep producing better and better footwear products. Ni Luh wants to convert that negative opinion into a positive one.

Ni Lou footwear brand is currently displayed in hundreds places including 35 personal outlets all over the world which are located in 20 countries, for examples, the United States, France, United Kingdom, Caribbean, Japan, Australia and United of Arab Emirates. On the other hand, Ni Luh only has three outlets in Indonesia, one in Bali and two in Jakarta. This is because Ni Luh really focuses her segment on international markets. Among her consumers are famous Hollywood stars such as Uma Thurman, Julia Roberts, Giselle Bundchen, Tara Reid and Robyn Gibson (Mel Gibson's wife). At the early stage, Ni Luh only had 2 workers but now there are 22 employees and three personal



assistants who help Ni Luh running her footwear business.

The designs of Ni Lou footwear are inspired by nature and graphical shapes. Most of the products are made from original leather and combined with gunny sacks, brasses, woods and beads. The prices attached include long life guarantees. Once one of the parts is broken, the consumer can ask for a free repair. Ni Luh also provides discounts for the next purchases. The after-sales services are provided to generate customer satisfaction and loyalty. Ni Luh also designs footwear for other brands in Australia such as Nicola Finetti, Shakuachi, Tristanblair and Jessie Hill.



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Brand : *BORSA*

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Brand : *CARVIL*



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Email : haidar_bahalwan@yahoo.co.id
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Products : *character sandals, shoes*
Brand : *SORRENTO, REDSTON*

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Fax : (62-321) 322860
Email : intidragon01@yahoo.com
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Products : *sport shoes, EVA beach sandal, thongs
& slippers*
Brand : *OEM*

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Web : www.kingsafetywear.com
Products : *upper, shoes*
Brand : *KING'S*

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Web : www.laspinacollections.com
Products : *shoe*
Brand : *LA SPINA*



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Products : *shoes, sandal*
Brand : *MOENUS, LIBRA*

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