

Health & Beauty Industry in Indonesia

WHAT'S INSIDE

Health and beauty industry in Indonesia shows a positive trend, and is predicted to keep growing until 2035. More players in this business unit exist in this sector, and compete to gain the largest market share nationally. Therefore, the government of Indonesia has decided to include this sector as prioritized industry, that needs to be comprehensively developed for short term and long terms.



editor's desk

Dear Valued Readers,

Indonesian health & beauty industry: Promising business sector until 2035

Indonesia's national economy continues to show positive developments. Local industrial sectors continue to emerge in various regions of Indonesia. One of the business units that helped enliven the industrial sector in Indonesia is beauty and personal care products.

The high level of domestic sales encourages the growing number of business players to take part in this sector, either local companies or foreign companies that open their branches in Indonesia. Market competition in the beauty and personal care sector is also getting tighter, due to the development of technology. The supporting technology makes the entrepreneurs able to create product diversity, in order to meet specific consumer demands.

The movement of beauty and personal care industry is also supported by the development of social media in Indonesia, which is one of the countries where the population actively utilizes social media. From around 262 million of Indonesian citizens, about 40% are the users of social media such as facebook, twitter, youtube and instagram. These mediums are utilized by beauty and personal care companies to achieve domestic market share as large as possible.

In addition to domestic market, the demand for Indonesian beauty and personal care products also come from overseas markets, such as the United States, Singapore, Malaysia, Thailand, and Philippines. The export performance of this product is predicted to keep increasing, particularly to OIC countries, due to the halal certification given to Indonesian cosmetic products as an added value in the world market.

Taking into account the current developments, the Indonesian government commits to encourage the growth of the national beauty and personal care industry. The commitment is outlined in the National Industrial Development Master Plan Number 14 Year 2015. Based on this regulation, the development stages of the national beauty and personal care industry will be conducted until 2035.

Thank You



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Hot Issue

INDONESIAN HALAL
HEALTH & BEAUTY
PRODUCTS FOR THE
WORLD





HOT ISSUE

حلال
HALAL

INDONESIAN HALAL HEALTH & BEAUTY PRODUCTS FOR THE WORLD

Referring to the Global Islamic Economy Report (GIER), there are six categories of halal products comprising of finance, food, travel, fashion, media and recreation, and also pharmaceuticals and cosmetics. In fact, the demand for halal products not only comes from the Muslim population alone. A number of other non-Muslim consumers also increasingly desire the halal of a product, with considerations of hygiene of raw materials sources and good management process, in accordance with prevailing security standards.

Regarding health and beauty products, halal certification will provide a security guarantee of a product for human body, especially the skin. Besides that, for Muslims consumers in particular, halal logo is as an identity to show that the raw materials used do not contain substances or elements that are prohibited in the religion of Islam.

The data published by GIER 2015/2016, the global Muslim market size for pharmaceuticals and cosmetics (health and beauty) products achieved USD 54 billion in 2014, and will rise up to USD 80 billion in 2020. The same data source also mentioned Indonesia as one of ten countries where halal pharmaceutical and cosmetics are best developed in the world. Among halal cosmetic brands from Indonesia are Wardah and Mandom.

Euromonitor International also reported that more and more cosmetics brands in Indonesia obtain halal certification. This strategy is as the effort of business actors to increase their market share nationally, considering almost 80% of Indonesia's citizens are Muslims. Moreover, the halal certification makes them have greater opportunity to export to Muslim nations in the world.

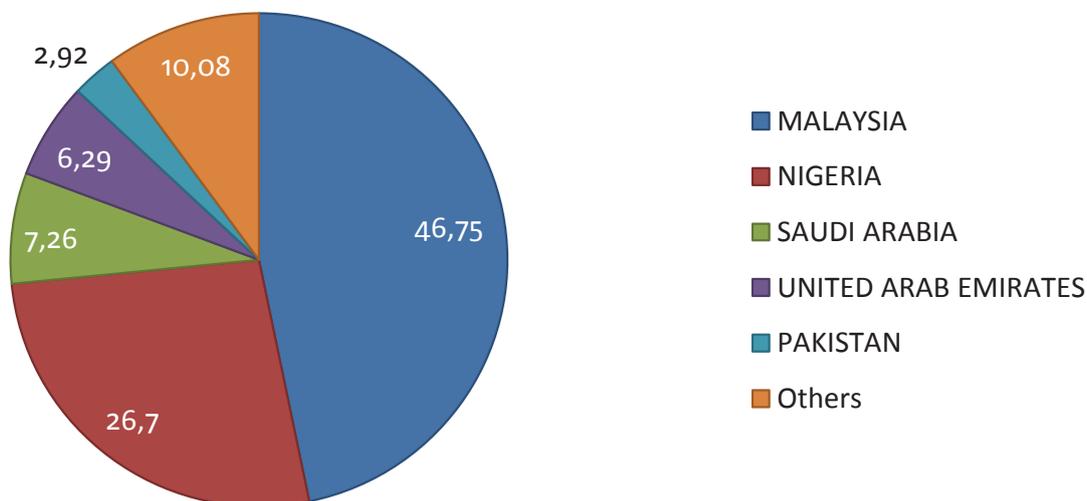
In 2016, the export performance of health and beauty products from Indonesia to countries grouped in the Organization of Islamic Countries (OIC) was valued at the amount of USD 72.54 million. Subsequently, during January-August 2017, the export transaction was already recorded at USD 40.87 million. The most attractive export markets in OIC countries for Indonesian health and beauty products are Malaysia (USD 19.11 million), Nigeria (USD 10.91 million), Saudi Arabia (USD 2.97 million), United Arab Emirates (USD 2.57 million), and Pakistan (USD 1.19 million).

The highest demand for health and beauty products from Indonesia are Medicaments (in measured doses excluding vaccines); Beauty or make-up preparations and preparations for skin care; Sunscreens and suntan preparations; Powder make-up or skin care preparations; and Medicaments containing hormones or other steroids used primarily as hormones, but not containing antibiotics.

The Indonesian government also underpins the efforts of business actors in the health and beauty sector to get halal certification, in order to increase their sales both at home and abroad. Several strategies that are implemented to encourage efforts of businessmen to get halal certification are by organizing seminars for entrepreneurs, and also provide services and facilities for halal certification registration online.



Indonesian Health & Beauty Products
Export Market Destination in OIC Countries
(%)





MARKET REVIEW

Indonesia 2019: Center of Health & Beauty Industry

One of industrial sector which shows significant growth in Indonesia is health and beauty products. There are a number of triggering factors that influence the movement of this business, such as the huge number of Indonesian population that automatically provides potential markets, the availability of natural resources as the raw materials to make health and beauty products, the development of technology applied in the production process, and also the richness of cultural heritage which transfers natural beauty herb and formulation.

Based on the data published by SWA magazine in June 2017, there are approximately 760 companies all around Indonesia that focus on cosmetics and personal care industry. Those business units employ nearly 700.000 workers. Since this sector plays important role to

enhance national economy, the Indonesian government include health and beauty industry as one of prioritized industry enacted in Government Regulation Number 14 Year 2015, titled "National Industrial Development Master Plan (Rencana Induk Pembangunan Industri Nasional/RIPIN).

The regulation divides the development agenda into two terms, short term in 2015-2019 and long term 2020-2035. In each term, mastery and application of technology is determined as the focus of the development, along with the strengthening of infrastructure. Basically, the development of health and beauty industry aims to strengthening the domestic market, as well as expanding international market penetration.



Targeting the huge market provided in Indonesia, a number of companies compete to offer products that suitable for local needs. Not only international companies, national companies also intensively promote their superior products, like PT Monica Hijau Lestari, PT. Martha Tilaar Group, PT Megasari Makmur, PT Mustika Ratu Tbk., and PT Nusa Selaras Indonesia. Meanwhile, the leading brands of beauty and personal care products in Indonesia are among others Wardah, Formula, Eskulin, Viva, Martha Tilaar, Sari Ayu, Ellips and Nuvo.

Globally, Indonesian health and beauty products has penetrated a number of foreign markets, mainly the United States (USD 210.15 million), Singapore (USD 116.61 million), Malaysia (USD 67.63 million), Thailand (USD 31.64 million), Philippines (USD 23.46 million), India (USD 17.75 million), United Kingdom (USD 17.05 million), United Arab Emirates (USD 16.35 million), France (USD 14.96 million) and Germany (USD 13.28 million). Products with the highest demand were wigs from synthetic textile materials, perfumes and toilet waters, essential oils, skin care items, and also false eyebrows or eyelashes made from synthetic textile materials.

On the other side, according to Euromonitor International report in May 2017, the beauty and personal care products in Indonesia are classified into 16 categories, comprising of (1) Baby and child-specific products; (2) Bath and shower; (3) Color cosmetics; (4) Deodorants; (5) Depilatories; (6) Fragrances ; (7) Hair care; (8) Men’s grooming; (9) Oral care; (10) Oral care excluding power toothbrushes; (11) Skin care; (12) Sun care; (13) Sets/kits; (14) Premium beauty and personal

care; (15) Mass beauty and personal care; and (16) other beauty and personal care items.

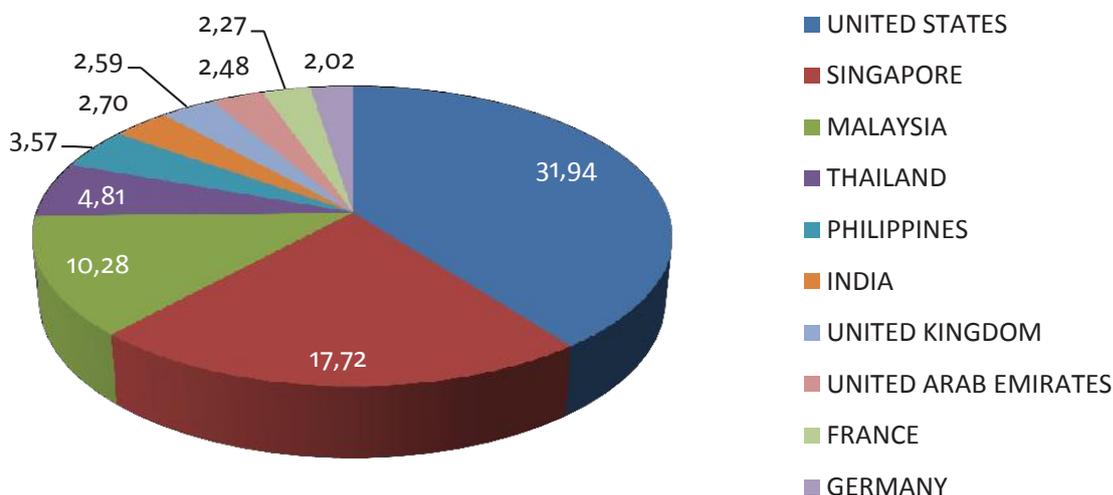
From those 16 categories, the biggest sales growth in 2011-2016 gained by Deodorants with 577.6%. Other significant growths also recorded by the categories of Skin care (126.8%), Men’s grooming (121.6%), and Premium beauty and personal care (103%).

Totally, in 2016, Indonesia was ranked at the position of 20 among all the world’s exporters for these products. However, the total export transaction for the commodity reached a positive trend during last five years, consecutively USD 814.60 million (2012), USD 859.45 million, (2013), USD 929.98 million (2014), USD 942.61 million (2015), and USD 1.01 billion (2016). Overall, the increasing trend in 2012-2016 was 5.46%. Meanwhile, the growth achieved in 2016 was 7.66% in comparison to 2015. The development of health and beauty products in Indonesia is influenced by some factors, mainly innovation and social media.

Observing the diverse and changing market demand, Indonesian business actors strive to meet the needs of their target consumers by applying innovation, both at domestic market and abroad. Thus, some companies start to diversify their products. For example, a company that previously has only been producing soap also starts to offer new products such as shampoo, toothpaste and others. Meanwhile, the company that has already have strong market position in the body lotion market, also began to expand into soap business.



Export Market Share (%)



Sales Value Growth of Beauty and Personal Care by Category (%)
2011-2016

Current value growth (%)	2015/16	2011-16 CAGR	2011/16 Total
Deodorants	19.5	46.6	577.6
Skin Care	12.4	17.8	126.8
Men's Grooming	15.5	17.3	121.6
Premium Beauty and Personal Care	12.1	15.2	103.0
Mass Beauty and Personal Care	11.2	14.6	97.9
Fragrances	10.5	14.6	97.8
Beauty and Personal Care	10.6	13.8	90.6
Baby and Child-specific Products	11.2	13.6	89.2
Hair Care	11.7	12.9	83.2
Sun Care	10.0	11.7	74.3
Sets/Kits	7.6	11.4	71.6
Color Cosmetics	7.7	9.9	60.6
Bath and Shower	6.9	8.6	51.0
Oral Care	5.9	7.7	44.9
Oral Care Excl Power Toothbrushes	5.9	7.7	44.9
Depilatories	-	-	-

Moreover, there are also brands or companies which conduct product diversification strategies by dispatching one product with different aroma or efficacy. Hence, the existing consumers or buyers have more options to buy a product. This is also a strategy implemented by the companies to maintain their loyal consumers, so that they are not turn into other brands.

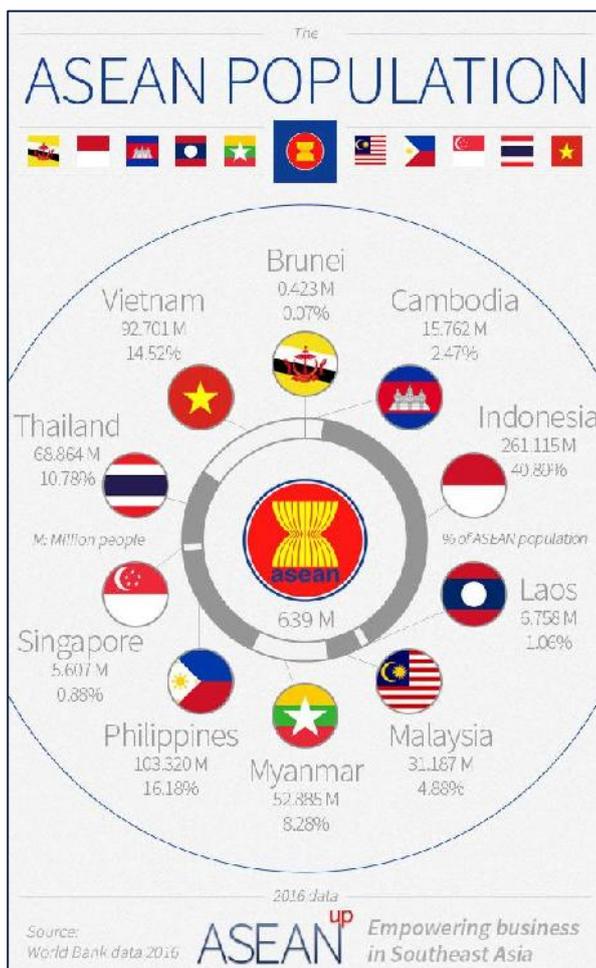
Subsequently, in relation to social media, the research result by Dave Chaffey which was published through Smart Insight on April 27, 2017, titled "Global Social Media Research Summary 2017", Indonesia is one of the countries where the population is active to use internet and social media. From population number of 262 million, among 40% or 106 million residents is active social media users. Particularly, Dave found that Indonesian people are the most active users for Twitter and Google+. Meanwhile, for Facebook and YouTube applications, Indonesia is respectively ranked in the number six and ten.

The research by Dave is linked to the report by Euromonitor International which also stated that the power of social media in influencing the decision to buy, also occurs in the health and beauty industry in Indonesia. Nowadays, many cosmetics companies utilize brand ambassadors on ads that are broadcast through social media. The brand ambassador will have a personal social media account, and try to get as many follower as possible.

Furthermore, the brand ambassadors will tell their everyday lives through videos or photos, in which there are segments when they use certain cosmetic brands.. Thus, the fans of the brand ambassadors are expected to also choose and use the same health and beauty products with their idols.

Promotional strategy through the existence of brand ambassadors has proved to be effective to increase sales figures in Indonesia, especially for companies determining the younger generation as the main target. This is because the young generation is the largest user of social media applications in Indonesia.





Source: ASEANup

Totally, Indonesia is resided by more than 260 million people. Given that Indonesia is a country with the largest population in Southeast Asia region, it is not surprising that the Indonesian government has a vision to make this country as the center of health and beauty industry in 2019. Hence, the usage of social media is predicted to continue as the primary choice in marketing strategy.

Analyzing the huge health and beauty market opportunity in Indonesia, a number of foreign companies opened their offices in Indonesia. For instance, PT Unilever Indonesia Tbk, PT Procter & Gamble Home Products Indonesia, and PT L'Oréal Indonesia, which grab the biggest market share in Indonesia for beauty and personal care products. In addition, there are also other players such as PT PZ Cussons Indonesia, PT Johnson & Johnson Indonesia, and PT Kao Indonesia.

Overall, Euromonitor International predicts the beauty and personal care industry will grow steadily until 2021. On the other hand, the Indonesian government is targeting the growth in this sector will continue to occur and develop until the year of 2035. Thus, the business actors in this field will have greater market opportunities in the long run.



1. BALI TANGI

Jl. Kebo Iwa No. 168, Denpasar - Bali 80117

Products:

Beauty or make-up preparations & preparations for the care of the skin.

2. BEA SARI JELITA

Jl. Hanoman Perum Graha Padma Blok B1 No. 42, Semarang - 50146

Products:

Bath And Toilet Soap; Other Soaps; Other Palm Oils.

3. GALENIUM PHARMASIA LABORATORIES

Jl. Adityawarman No. 67, Kebayoran baru, South Jakarta - 12160

Products:

Soap In Other Forms; Face and skin creams and lotions.

4. GONDOWANGI TRADISIONAL KOSMETIKA

Kawasan Jababeka I, Jl. Jababeka XVII D, Blok U No. 29 C Cikarang, Bekasi - 17530

Products:

Shampoos; Beauty or make-up preparations & preparations for the care of the skin; Cosmetics.

5. INTRADITA PROSIMPEX

Jl. Raya Kapuk Kamal No. 6 RT. 010/011, Cengkareng Timur, West Jakarta

Products:

Bath And Toilet Soap; Tooth Paste; Face and skin creams and lotions; Detergents; Liquid.

6. JAMU AIR MANCUR

Graha Pratama 8th floor, Jl. M. T. Haryono Kav. 15, South Jakarta - 12810

Products:

Extracts, Essences & Concentrates of Other Tea or Mate; Beauty or make-up preparations & preparations for the care of the skin; Other Mineral Water Containing Added Sugar; Medicinal Herbs.

7. MANDOM INDONESIA TBK

Jl. Yos Sudarso By Pass (PO Box 1072, Sunter Jaya), North Jakarta - 14010

Products:

Beauty or make-up preparations & preparations for the care of the skin; Face and skin creams and lotions; Eye Make-Up Preparations; Lip Make-Up Preparations.

8. RISTRA INDOLAB

Jl. Radio Dalam Raya No. 5, South Jakarta - 12140

Products:

Beauty or make-up preparations & preparations for the care of the skin; Cosmetics; Eye Make-Up Preparations; Face and skin creams and lotions.

9. SEKAWAN COSMETICS

Jl. Bluru Kidul (Lingkar Timur) No. 183, Sidoarjo - 61251

Products:

Beauty or make-up preparations & preparations for the care of the skin; Other Beauty or Make Up Preparation; Other Preparations, Used For Hair; Face and skin creams and lotions.

10. SPARINDO MUSTIKA

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Products:

Beauty or make-up preparations & preparations for the care of the skin; Other Beauty or Make Up Preparation; Cosmetics.





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