

ExportNews

I N D O N E S I A

CERAMIC TILE

MORE HOUSES, MORE TILES

WHAT'S INSIDE

Indonesia has become a leading exporters of ceramic tile products providing various products to the markets both at home and abroad. Indonesian ceramic tile manufacturers are ready to meet the demands for quality and various ceramic tile products with the development of technology in ceramic tile industry.

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Dear awesome readers,

Ceramic tile is commonly used in the construction of various buildings, such as housings, offices and schools. Ceramic tiles have strong materials, giving the impressions of clean and luxury, making it the main choice in the constructions of infrastructure and property projects.

Indonesian ceramic tiles have advantages with unique designs and natural raw materials which are supported by digital printing concept to produce quality ceramic tiles and are widely known in the international market, especially in ASEAN. Indonesian ceramic tile market is thriving with the government's 1-million house program and the ASEAN Economic Community which provides a single market. Indonesia has huge capital in ceramic tile industry with sufficient technology and factories capable of producing ceramic tiles to meet demands both at home and abroad.

The May edition of Export News discusses various issues of Indonesian ceramic tiles, from its export development to other important information to facilitate readers who want to buy the Indonesian product. This month's edition, as usual, also contains a list of ceramic tile exporters so that potential buyers can directly contact them to procure the desired products.

Thank you.

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More Houses, More Tiles

Ceramic tile business is influenced by property and infrastructure businesses. In 2016, ceramic tile business is thriving as property business experiences an upswing while at the same time new infrastructure are being constructed everywhere.

Demands for ceramic tiles are increasing from property and infrastructure businesses in 2016. At home, ceramic tile demands from new property businesses made up 30% from the total demands while the remaining 70% is from the renovations and repairs of buildings and other properties.

With increasing world population, demands for housing, a human's basic necessity, will also increase. The Indonesian government has launched the 1-million house program which provides much-needed boost for ceramic tile manufacturers. Meanwhile, the Southeast Asian market is estimated to need some 1.8 billion square-meters of ceramic tiles. The figure is derived from there are some

655 million people in the region which needs between 2.5 square-meters to 3 square-meters each.

In 2015, the Indonesian ceramic tile production reached 350 million square-meter of which 87% was for domestic market and 13% was being exported. The production is being ramped up in 2016 due to huge opportunities especially in Southeast Asian markets. Indonesian ceramic tile industry has an advantage when compared to its competitors with the availability of huge reserve of raw materials in several locations. The raw materials include ball clays, feldspar and zircon as well as gas reserve as fuel for production process.



CERAMIC TILE FOR HIGHER STANDARD OF LIVING

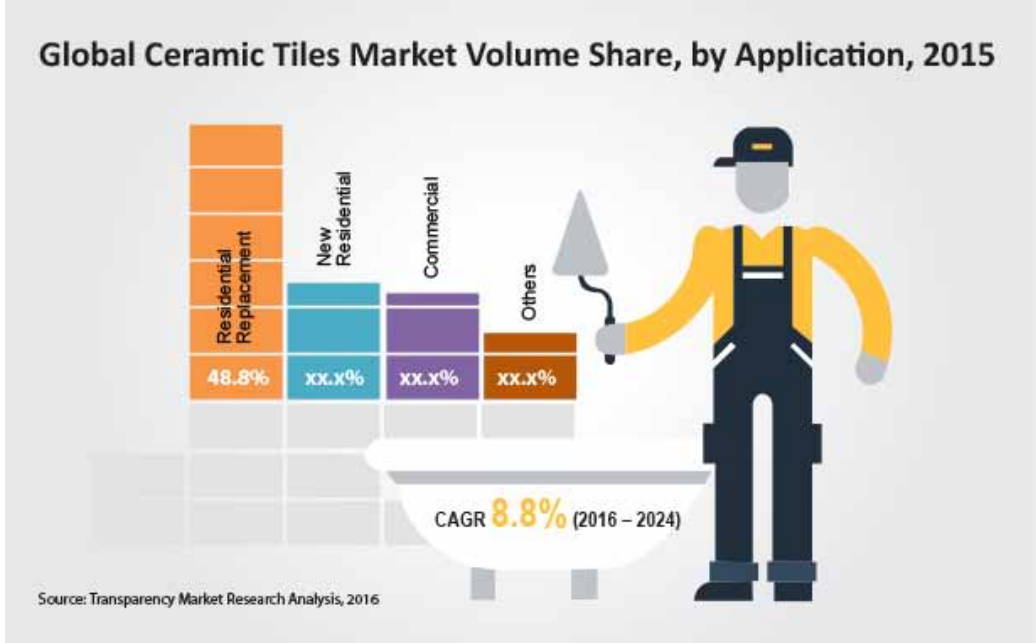
Ceramic tile is becoming the product of choice for customers to replace marble tiles. When compared to marble tiles, ceramic tiles have luxurious look and lower prices. People are using ceramic tiles to make their houses look glamorous. Indonesia is known as one of the world's major producers of ceramic tile, which is capable of producing ceramic tiles using natural raw resources, again another reason not to use marble tiles. Durable and light digital printing with varied designs is another advantage of Indonesian ceramic tiles.

Currently, Indonesian ceramic tiles are not only used as flooring but also as wall decoration. There are more and more Indonesian ceramic tile makers using high technology coupled with original designs from artistic hands producing not only quality ceramic tiles but also has artistic values, such as those with floral and fauna designs. Many manufacturers also produce made-to-order ceramic tiles based on orders from foreign buyers so the tiles have unique designs. Ceramic tile makers are taking all the pains to fulfill the customers' demands which are different from one customer to another. Gradually, ceramic tile has become a product which represents current high standard of living.

Ceramic Tile

The market for ceramic tile is influenced by property and infrastructure businesses. People all over the world are developing their own countries, which are tidying up and preparing themselves to face the global market by strengthening their infrastructure. On the other hand, property business will still be increasing due to higher demands thanks to the population explosion, therefore the need for housing is also skyrocketing. These two sectors are spurring growth for ceramic tile business globally.

The world ceramic tile market is estimated to reach US\$125.32 billion in 2020. The consumption by then is estimated to be 21,822.7 million square-meters, an increase by 8.5% from the consumption in 2014. Floor tile will still be the most consumed product when compared to wall tile. While there are competitors to floor tile, such as tiles made from wood and other materials, ceramic floor tile has the advantages of durability, shock resistant, and heat resistance so ceramic tile will still be superior when compared to tiles made of other materials.



Asia Pacific region is ceramic tile's largest market, comprising 60% of the global volume. Development in Asia Pacific is so rapid due to high urbanization in the region especially in countries such as China and India. The population in this region is shifting to ceramic tile from marble floors, metal slabs and other decorative products hence increasing the consumption of ceramic tile. The second largest market is Europe, driven by households who are renovating their houses. The trend is expected to remain in the next few years.

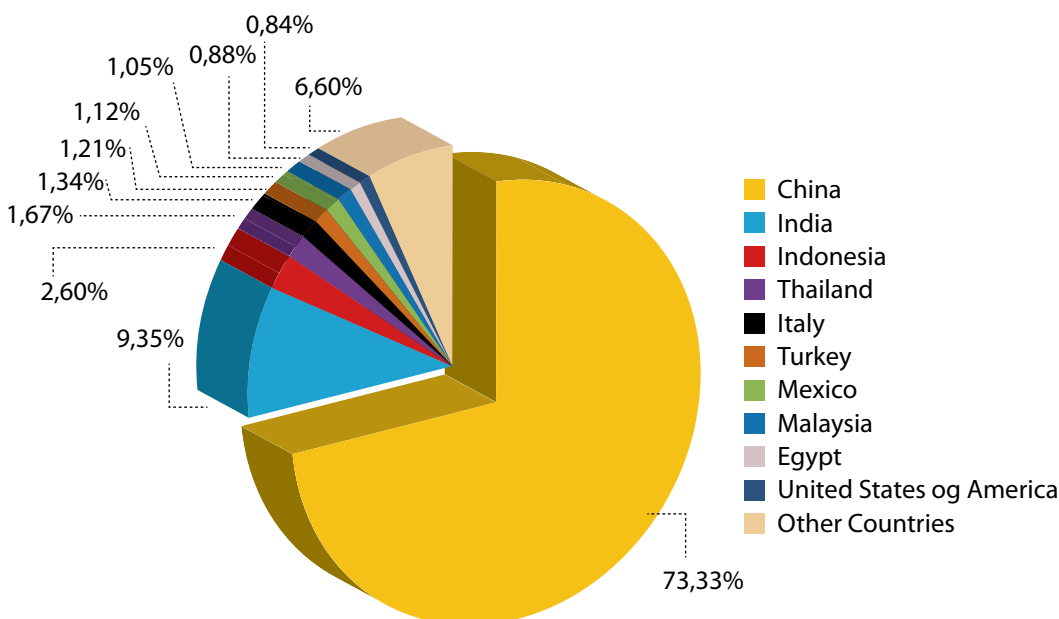
INDONESIAN CERAMIC TILE

Ceramic tile products are grouped into two Harmonized System (HS) code groups. The first group is HS 6907 for Unglazed ceramic flags & paving, hearth tiles, etc. Products under this HS code is further divided into two sub-groups: HS 690710 for Unglazed ceramic tiles, cubes and similar articles, the largest surface area

of which can be enclosed in a square; and HS 690790 for Unglazed ceramic flags and paving, hearth or wall tiles Nesoi (Not elsewhere specified or indicated).

The second group is HS 6908 for Glazed ceramic flags & paving, hearth tiles, etc. This group is also divided into two sub-groups: HS 690810 for Glazed ceramic tiles, cubes and similar articles, largest surface area of which can be enclosed in a square with sides less than 7 cm; and HS 690890 for Glazed ceramic flags and paving, hearth or wall tiles Nesoi (Not elsewhere specified or indicated).

Indonesia is the world's third largest exporter for ceramic tile with a market share of 2%. Ceramic tile major exporters are dominated by Asian countries such as China, India, Malaysia and Thailand. The following pie chart depicts the world's Top 10 exporters of ceramic tile:

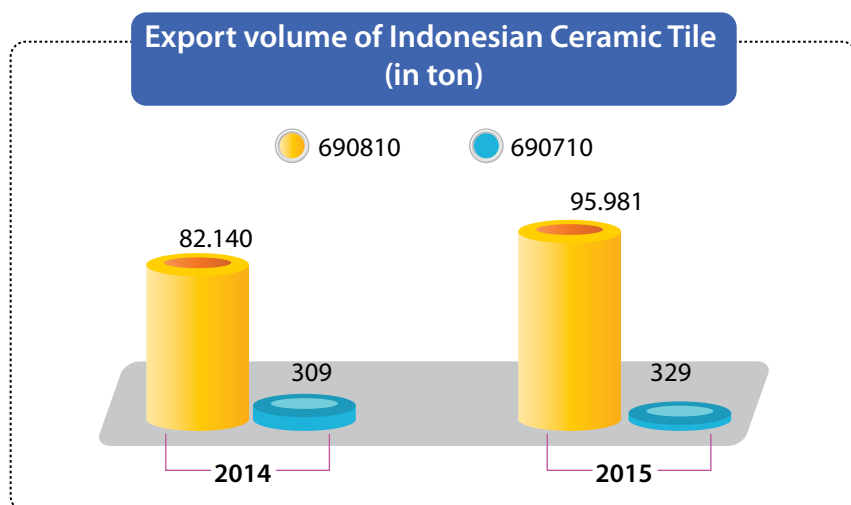
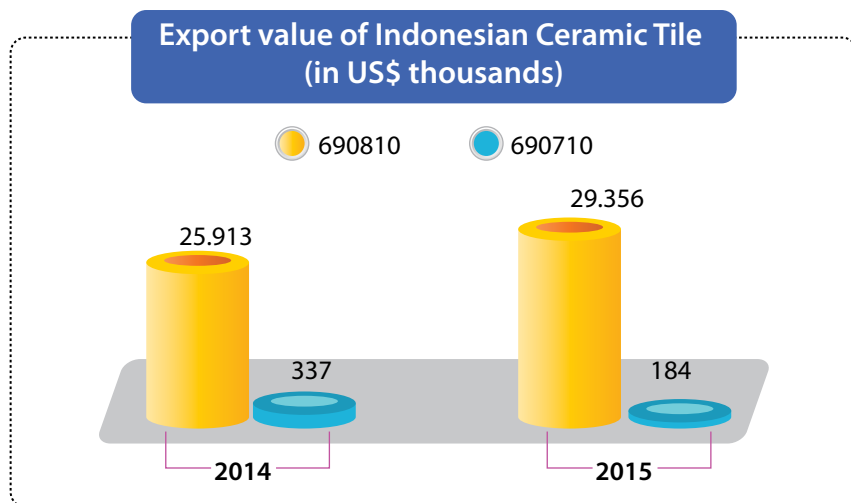


Source : ITC calculations based on UN COMTRADE statistics.

Indonesia exported ceramic tile worth US\$29.54 million in 2015, an increase of 16.81% when compared to the previous year. Indonesia only exports ceramic tiles grouped under HS 690810 and HS 690710.

Most of Indonesian ceramic tile export is products grouped under HS 690810 in the period of 2011-2015. The export enjoyed an increase of 15.12% from US\$16.49 million in 2011 to US\$29.96 million in 2015. The export value in 2015 represented an increase of 13% when compared to the previous year while the

export volume showed an increase of 17%. A different fortune was evident in decreasing export value of ceramic tile products grouped under HS 690710. The export value contracted by 25.23% in the past five years. Export value in 2015 US\$184,000 represented a 45% decrease from the value in 2014. However, the volume showed a rather small increase of 7%. This condition indicated that the price was decreasing, probably due to excessive supply of Indonesian products in the market. The following graphs show the export value and export volume for both ceramic tile sub-groups:



Source : Statistics Indonesia.

Indonesian ceramic tiles have been exported to various countries especially in Asia as the main market while European markets have also shown their interests. The largest destination in 2015 was the United States with an export value of US\$5.95 million which showed an increase of 32% when compared to the figure in 2014. The Philippines was the second largest destination with an export value of US\$4.87 million or 16.50% share, followed by Malaysia at US\$3.66 million (12.40%) and the United Kingdom with US\$2.36 million (7.98%). South Korea completed the Top 5 destinations of Indonesian ceramic tile products with an export value of US\$2.12 million or 7.19%. The export to United Kingdom experienced the largest growth at 81% when compared to the export value in 2014.

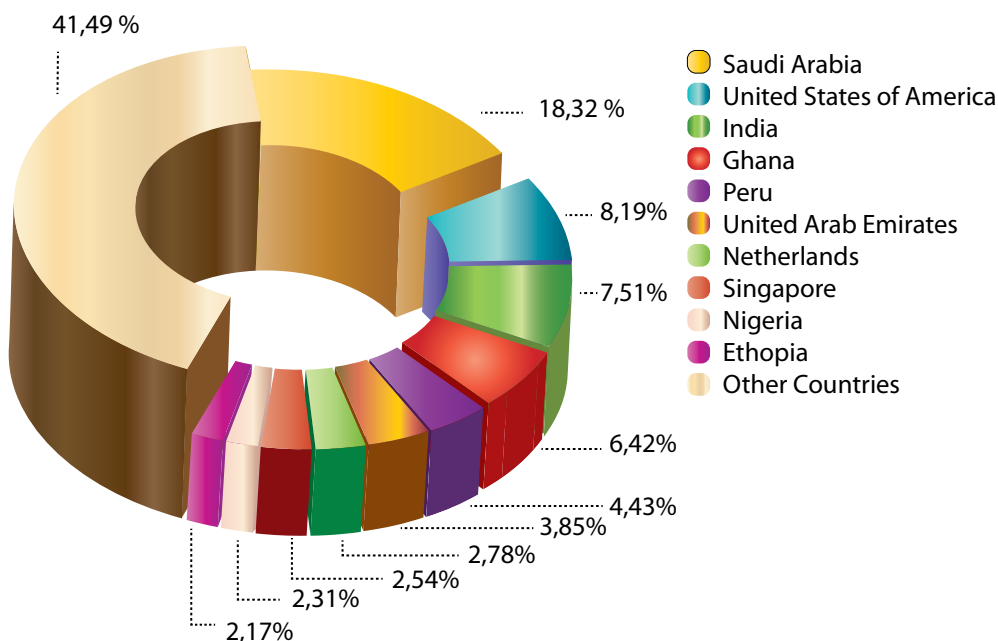
On the importer side, Saudi Arabia had the largest consumption for ceramic tiles as the country was having huge development especially in renovating haj

supporting facilities. Saudi Arabia's import value of ceramic tile in 2015 reached US\$187.55 million or a share of 18.32% from the world's total import of ceramic tile products. The import figure in 2015 increased by 32.83% from 2014. It is estimated that Saudi Arabia's needs for ceramic tile products will still increase.

The world's largest economy, the United States, was the world's second largest importer with an import value of US\$83.82 million or a share of 8.19%, followed by India with US\$76.87 million (7.51%), Ghana at US\$65.70 million (6.42%), Peru at US\$45.33 million (4.43%) and United Arab Emirates with 39.42 million (3.85%). The following chart shows the world's largest importers of ceramic tiles in 2015.

Ceramic tile products grouped under HS690810 made the largest group being imported in the international market with an import value of US\$581.30 million or 56.78% from the total import in 2015.

The World's Largest Importers of Ceramic Tiles in 2015 (%)



Source : ITC calculations based on UN COMTRADE statistics.

LIST OF EXPORTERS

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Website : www.arwanacitra.com
Product : *Bricks, Blocks, Tiles & Oth. Ceramic Goods*

KUDA LAUT MAS, PT

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Email : kudalautmas@massceramic.com,
marketingkudalaut@gmail.com
Website : www.massceramic.com
Product : *Bricks, Blocks, Tiles & Oth. Ceramic Goods*

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Jawa Timur
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Fax : (62-31) 7662580, 7666155
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Website : www.ptkdi.com
Product : *Ceramic Flooring Blocks*

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Email : solution5555@yahoo.com,
cvsolutionexport@gmail.com,
solutionexportcv@gmail.com
Website : www.solutionexport.com,
<http://duniamarmer.com/>
Product : *Marble, Travertine & Alabaster, Mosaic Cubes of Natural Stone, Statuettes & Oth. Ornamental Ceramic Articles Oth. Than Porcelain or China, Tiles & Similar Articles of Marble*

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