

CRYSTAL-CLEAR, Durable Indonesian Glassware Products For The World

What's Inside

With the abundance of raw materials and thriving glassware industry, Indonesia is poised to become one of the major producers and exporters of glassware products.

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**DIRECTORATE GENERAL OF
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Dear Valued Readers,

As we are nearing the end of 2013, we believe that you have also nearly fulfilled the targets that you have set for this year.

The November 2013 edition of Export News, published by the the Directorate General for National Export Development (DGNED), Ministry of Trade, Republic of Indonesia, is bringing you glassware products under the HS 7013, "Glassware Of A Kind Used For Table, Kitchen, Toilet, Office, Indoor Decoration Or Similar Purposes".

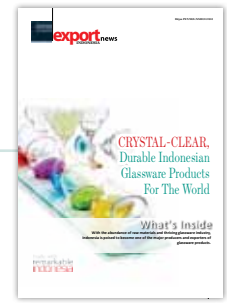
There are plenty of household items that are made of glass with its own uniqueness of being solid but transparent as it is liquid. Glass are generally made from a mixture of quartz sands or silica, lime and soda which are molten in a high temperature. Another advantage of glass is that it is recyclable to be made into other products. The development of glassware industry in Indonesia is related to various policies taken by the Indonesian government such as ease of investment and acquisition of raw materials. On the other hand, demands for glassware keeps increasing, both from domestic and international markets. The glassware products that are in high demand include, cups, saucers, bowls and various household utensils made of glass and crystal.

Indonesian glassware products can compete in the global market as Indonesia is ranked 17th as the world's largest exporter. This shows that Indonesian glassware manufacturers have what it takes to become a top exporter as there are still plenty of opportunities.

We do hope that with the development in Indonesian glassware industry, foreign buyers and importers will have no doubts to establishing a mutually beneficial relations by directly contacting the producers.

Thank You

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hot issue

Glassware is becoming an indispensable part of modern living thanks to its various uses. Glassware products are always in high demand all over the world, leading to a permanent presence in the world's market. Not to mention that the demand for glassware is increasing year after year. Glassware products are used in daily life.

Indonesia is blessed with raw materials for glassware products. The country, however, still has to improve the quality of its glassware products to match or even surpass those manufactured by other countries. So far, Indonesian glassware products are exported mainly to Asian countries such as Japan, Vietnam,

Malaysia, the Philippines and India.

Regulations related to glassware exports are not too restrictive for exporters. Every glassware product which is entering a country has to be hygienic and safe to use, as well as does not contain dangerous materials.

In general, glassware is a transparent and durable good, does not react with chemical substances, water resistant and malleable with smooth surface. Glassware products are made by a heating process with a complex composition.

Hot Issue

Some of glassware characteristics are:

- High aesthetics value
- Mostly transparent
- Elastic
- Resistant from chemical substances

Glassware has several characteristics depending on its manufacturing process, atomic structure and thermodynamics condition. Glass is formed by the mixture of various inorganic oxides, alkali soil, alkali compounds, quartz sand and others. Glass has special characteristics when compared with other ceramic classes which are influenced by the uniqueness of silica (SiO₂) and its formation process. Glass can be described as vitreous or thermogel with complex composition. The compound was acquired by freezing liquid through cooling. Glass is an amorphous (non-crystalline) solid material that exhibits a glass transition, which is the reversible transition in amorphous materials (or in amorphous regions within semicrystalline materials) from a hard and relatively brittle state into a molten or rubber-like state.

Color and infra-red rays can pass through glass but not ultraviolet ray. Heating will cause glass to expand which is greatly differ from one glass to another depending on the expansion coefficient. If the heating or cooling process is too quick or concentrated in one point, there will be a stress. Because glass is fragile, stress cause cracks. Special additives, such

as boron oxide, can make glass more resistant to chemical substances and temperature changes. Quartz has better technical characteristics due to its smaller expansion coefficient.

Glass is a good electric insulator and bad heat conductor, especially glass wool. Glass chemical characters will change after in use for years or in a much shorter time if it is used in temperature higher than 1,500oC. The change starts with crystallization in several spots and finally in all places. Therefore, the glass will become brittle and no longer useable. There are high demands in both domestic and export markets for glass-ceramics and glass products with various up-to-date designs and cater to the market's trends and consumers' requests, such as creating logo for individuals or corporations.

There are also professional services to make various promotion products from ceramic bowls, mugs and plates, and other products such as flower vase, crystal flowers and fashion products. Such souvenirs are suitable for corporate gifts or promotion items.

Glassware is organized in the Harmonized System (HS) 7013 Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes (other than that of heading No.70.10 or 70.18). The category is divided into a number of sub-groups as follow:

HS CODE	COMMODITY
701310	Glassware of a kind used for table kitchen, etc of glass-ceramics
701321	Drinking glasses other than glassceramics, of lead crystal
701322	Drinking glasses, stemware, of lead crystal
701328	Drinking glasses, stemware (excl. of glass ceramics or of lead crystal)
701329	Drinking glasses other than glassceramics nes
701331	Table/kitchenware (ex drinkg glass) o/t glass-ceramics of lead crystal
701332	Table/kitchenware (ex drinkg glass) o/t glass ceram coef < 5x10-6 etc
701333	Drinking glasses of lead crystal (excl. stemware)
701337	Drinking glasses (excl. glasses of glass ceramics or of lead crystal)
701339	Table/kitchenware (exc drinking glasses) other than glass-ceramics nesoi
701341	Glassware of lead crystal, of a kind used for table or kitchen purpose
701342	Glassware for table or kitchen purposes of glass having a linear coeff
701349	Glassware for table or kitchen purposes (excl. glass having a linear coeff
701391	Glassware nes of lead crystal (other than that of 70.10 or 70.18)
701399	Glassware nes (other than that of 70.10 or 70.18)



CRYSTAL-CLEAR, Durable Indonesian Glassware Products For The World

Glassware products have been used by the public in Indonesia. The use of glassware will continue with the progress of time which is becoming more advanced. Indonesian glassware goods are not only used by the local public but also by the world's society.

Indonesia has managed to develop glassware products which can compete in the global market with goods made by other countries. Indonesian manufacturers of glassware goods under the HS 7013 have exported their products all over the world. The companies include the Kedaung Industrial Group (KIG) and Maspion Group.

The Kedaung Group is an unconsolidated federation of over 30 companies. Since its inception in 1969 with the establishment of PT. Kedaung Industrial Ltd., the KIG group has become one of the dominant global leaders in glassware manufacturing.

The Group produces 1,200 tons of glass (equivalent to around 8 million pieces every day); with more than 2,500 items in its production line which are

aggressively marketed to a successful network of over 500 buyers in 120 countries.

Thanks to its numerous overseas marketing offices and through active participation in international trade shows each year, KIG Group managed to ensure as much as 50% of its products being sent to customers in places as far flung as the North and South Americas, Europe, the Middle East, the Pacific and Oceania regions, as well as Africa.

KIG has doubled its production capacity since 1989 using the latest, state-of-the-art glassmaking technology from Germany, Italy, France and the United States. This has allowed the group to accommodate increasing demand for quality product from a number of prestigious clientele worldwide such as Wal-Mart, Woolworth, Ikea, Carrefour, Dollar General, Hero, Matahari, Lotte Mart, and many other retailers.

The Group has opened a number of factories to cope with increasing demand. PT Kedaung Industrial Ltd is located in Langgeng Sahabat Industrial Estate in

Market Review

Cikande, Banten; PT Kedawung Subur is located in Rungkut Industrial Estate, Surabaya, East Java; PT Kedawung Surya Industrial and PT Kedaung Medan Industrial Ltd in North Sumatra.

To anticipate the importance of export market, Kedaung Group has established new manufacturing plants in Alexandria and Cairo, Egypt, which started operation in 2009. Egypt was chosen because of its strategic location to strengthen the group's market leadership in Middle East, European and the United States as well as gaining international leadership in glassware market.

Another major glassware producer is PT Maspion, a member of Maspion Group, and one of the world's largest durable goods producer. The company has strong expertise in marketing and manufacturing a wide series of quality houseware products from kitchenwares, plastic housewares, glasswares, to electrical home appliances. The

company also produces PVC and PE pipes for residential and household purposes.

PT Maspion has an established and extensive distribution networks both at home and abroad through its distributors, agents, or retailers, as well as representatives in major cities in Indonesia and major developed countries. The company has also been strong in establishing strategic alliances with major prominent foreign partners in manufacturing consumer durable products. Such strategic alliances have allowed the company to strengthen its position as market leader in both the domestic and global markets.

Headquartered in Surabaya, East Java, PT Maspion has also become a well recognized OEM (Original Equipment Manufacturing) players in the world, supplying some well known retail stores and wholesalers in United States as well as other major countries in the world.

EXPORT

The world exported US\$10.32 billion worth of glassware products under HS 7013 in 2012, according to ITC calculations based on UN Comtrade statistics. The 2012 export figure was increasing by 11.43% from US\$9.26 billion in the previous year. All in all, the world showed an annual trend of 7.07% in the 5-year period from 2008 to 2012. The export was US\$8.32 billion in 2008 before falling to US\$7.19 billion in 2009. Export of glassware

products recovered in 2010 with an export of US\$8.60 billion.

China has been the world's largest exporter in the period by exporting US\$4.51 billion worth of glassware products in 2012 for a market share of 43.77%. China's export in 2012 was an astounding 48.60% jump, considering current world economy, from the US\$3.04 billion worth of glassware

NO	COUNTRIES	Exporter Value (US Dollar thousand)					Trend % (08 - 12)	Growth % (11 - 12)	Share % (2012)
		2008	2009	2010	2011	2012			
	All Countries	8.329.557	7.190.688	8.609.261	9.266.453	10.325.485	7,07	11,43	100
1	China	1.914.760	1.962.946	2.635.709	3.041.042	4.518.989	24,05	48,60	43,77
2	France	1.041.888	785.843	867.727	863.217	797.981	-4,30	-7,56	7,73
3	Germany	699.600	580.303	610.589	661.902	640.015	-0,46	-3,31	6,20
4	Turkey	441.517	402.358	423.749	469.534	460.759	2,43	-1,87	4,46
5	Italy	473.765	362.628	368.983	412.366	389.917	-2,58	-5,44	3,78
17	Indonesia	123.122	111.404	122.657	109.026	101.509	-3,99	-6,89	0,98
	OTHER COUNTRIES	3.634.905	2.985.206	3.579.847	3.709.366	3.416.315	0,94	-7,90	33,09

Sources : ITC calculations based on UN COMTRADE statistics

products it exported in 2011. China enjoyed a healthy annual growth average of 24.05% the period of 2008-2012.

France was at a distant second as the world's top exporter, sending US\$797.98 million worth of glassware goods for a market share of 7.73% in 2012. The export showed a 7.56% decrease from US\$863.21 million in 2011. France suffered from an average annual contraction of 4.30% in the period of 2008-2012.

European largest economy Germany was following France closely with an export of US\$640.01 million (6.20%) for a market share of 4.46% in the third place. The 2012's figure represented a 3.31% drop from Germany's export in 2011 at US\$661.90 million. Germany's export suffered from an average annual decrease of 0.46% in the period of 2008-2012.

Turkey was at the fourth place with an export US\$460.75 million for a market share of 4.46% in 2012, which was a 1.87% reduction from US\$469.53 million in 2011. Turkey, however, still enjoyed an annual average growth of 2.43% in the period of 2008-2012. Turkey was the only country with a positive growth in addition to China in the Top 5 exporters.

Completing the world's Top 5 exporter of glassware goods was Italy with an export of US\$389.91 million for a market share of 3.78% in 2012. It was a 5.44% decrease from US\$412.36 million in 2011. Italian export of glassware goods had a 2.58% of annual average contraction trend from 2008 to 2012.

In the Czech Republic was the sixth largest exporter with US\$314.34 million for a market share of 3.04% followed by the United States with US\$307.61 million (2.98%), Poland with US\$269.88 million (2.61%), the Netherlands with US\$222.20 million (2.15%) and Egypt completed the Top 10 exporters of glassware with an export of US\$220.445 for a market share of 2.13%.

Indonesia was at the 17th place in 2012 with an export of US\$101.50 million for a market share of 0.98%. The export contracted by 6.89% from US\$109.50 million in 2011 with Indonesia was

suffering from an annual average decrease of 3.99% in the 5-year period from 2008 to 2012. Indonesia exported US\$123.12 million in 2008 and dropped to US\$111.40 million in 2009. Export seemed to recover in 2010 with US\$122.65 million only to drop again to US\$109.50 million in 2011.

Japan was the top export destination for Indonesia glassware products in the first nine months of 2013 with an export of US\$8.67 million or 11.62% from the total export. The export to Japan decreased by 16.93% from the figure in the same period in 2012 of US\$10.44 million. The full-year export to Japan in 2012 was US\$11.69 million, increasing slightly from US\$11.18 million in 2011.

In the second place was Turkey which was catching up as major export destination for Indonesian glassware products. The export to Turkey constituted 9.26% of total export, at US\$6.91 million, in the nine months ending in September 2013, a whopping 124.53% increase from US\$3.08 million in the same period in 2012. The full year export to Turkey in 2012 was US\$4.13 million.

South Africa was third with US\$5.98 million (8.02%) followed by Brazil with US\$7.30 million (7.30%) and Vietnam with US\$4.45 million (5.96%) to complete the Top 5 export destinations for Indonesian glassware products.

Indonesian export of glassware goods is dominated by goods group in the HS 701349 Other Glassware Of A Kind Used For Table (Other Than Drinking Glasses)/ Kitchen Purposes, Other Than Of Glass-Ceramics/ Lead Crystal/Of Glass Having A Linear Coefficient not > 5x10⁻⁶ per Kelvin within a temperature range of 0° C to 300° C. The export was US\$25.01 million in the nine months ending in September 2013 or 33.50% of Indonesia's total export in the period. It was an 11.20% decrease from US\$28.17 million in the same period of 2012. The full-year export of HS 701349 in 2012 was US\$35.47 million, decreasing from US\$51.08 million in 2011.

The second largest sub-group was the HS 701399 Glassware (Including Glassware Of A Kind Used For Toilet, Office, Indoor Decoration Or Similar Purposes) Nesoi, Not Of Glass-Ceramics Or Lead

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Crystal. The export in the first nine months of 2013 was US\$16.10 million or 21.56% of Indonesia's total export in the period. Export in the sub-group contracted by 4.25% from the same period in 2012 at US\$16.81 million. Export of glassware products in the sub-group for 2012 was US\$20.13 million, increasing from US\$14.57 million in 2011.

Export of products put under the HS 701342 Glassware Of A Kind Used For Table (other Than

Drinking Glasses)/Kitchen Purposes, Other Than Of Glass-Ceramics , Of Glass Having A Linear Coefficient Of Expansion Not > 5x10-6 Per Kelvin Within A Temperature Range Of 0 °C to 300 °C sub-group was the third largest at US\$14.32 million or 19.18% of the total export in the nine months ending in September 2013. It was a 15.30% contraction from the export in the same period in 2012 of US\$16.91 million. The full year export for 2012 was US\$22.33 million, increasing from US\$17.16 million in 2011.

IMPORT

The world imported US\$7.95 billion worth of glassware products in 2012, a 1.78% increase from the import value in 2011 of US\$7.81 billion, according to ITC calculations based on UN COMTRADE statistics. The average annual import growth for the 5-year period from 2008 to 2012 was relatively flat at 3.42%. The world imported US\$7.55 billion in 2008 before decreasing to US\$6.18 billion in 2009. Import of glassware made a healthy rebound to US\$7.27 billion in 2010 and further strengthened to US\$7.81 billion in 2011.

The United States has been the largest importer of glassware goods in the 5-year period from 2008 to 2012. The world's largest economy imported US\$935.86 million worth of glassware products in 2012, or 11.77% of the world's import. The 2012's

import represented a 9.43% increase from the US\$855.20 million the United States imported in 2011. The United States had an average import trend of 2.8% in the period of 2008-2012.

Germany, the world's third largest exporter at US\$640.01 million, was the second largest importer with US\$530.58 million, or 6.67% of the world's total import. The 2012 import was a 4.33% reduction from Germany's import in 2011 of US\$554.60 million. Germany's import of glassware goods had a relatively flat 0.35% of average annual growth in the period of 2008-2012.

Interestingly, France was third as the world's largest importer although it was the world's second largest importer of glassware at US\$797.98 million. France

No	Countries	Imported value (US Dollar thousand)					Trend % (08-12)	Growth % (11-12)	Share % -2012
		2008	2009	2010	2011	2012			
	All Countries	7,550,332	6,189,140	7,276,392	7,811,449	7,950,187	3.42	1.78	100
1	United States	906,224	691,697	837,256	855,201	935,862	2.8	9.43	11.77
2	Germany	566,883	468,983	531,523	554,602	530,587	0.35	-4.33	6.67
3	France	402,334	336,802	346,502	334,865	313,705	-4.91	-6.32	3.95
4	United Kingdom	365,488	294,468	315,948	352,592	308,565	-1.57	-12.49	3.88
5	Canada	283,310	244,039	270,964	287,091	294,144	2.4	2.46	3.7
6	Russian Federation	159,892	116,479	210,605	243,079	267,657	19.32	10.11	3.37
7	Japan	216,744	178,485	191,944	220,985	247,486	4.91	11.99	3.11
8	United Arab Emirates	203,515	217,329	239,472	329,840	228,739	6.73	-30.65	2.88
9	Italy	332,085	235,066	254,301	269,635	213,945	-7.15	-20.65	2.69
10	Netherlands	191,073	142,019	165,908	207,176	202,174	5.03	-2.41	2.54
57	Indonesia	22,231	14,018	19,989	29,721	31,804	15.81	7.01	0.4
	OTHER COUNTRIES	2,762,023	2,262,632	2,593,586	2,693,609	2,877,144	2.59	6.81	36.19

Sources : ITC calculations based on UN COMTRADE statistics

imported US\$313.70 million in 2012 or 3.95% from the world's total import.

The fourth largest importer was the United Kingdom with US\$308.56 million for a share of 3.88% while Canada completed the world's Top 5 importer of glassware products with an import of US\$294.14 million (3.7%).

Indonesia stood at the 57th place with an import of US\$31.80 million or a share of 0.4% in 2012. It was a 7.01% increase from the import in 2011 of US\$29.72 million. With an annual average growth of 15.81%, Indonesia imported US\$22.23 million in 2008 before slumping down to US\$14.01 million in the following year. Import began to recover in 2010 with US\$19.98 million in 2011 and jumped to US\$29.72 million 2012.

China has been the single largest source of imported glassware products in past 6 years. Imports from China in the nine months ending in September 2013 amounted to US\$17.26 million or 69.39% of Indonesia's total import. The import was a 11.19% decrease from US\$19.44 million in the same period in 2012. The full year import from China in 2012 was US\$23.90 million. The import from China had an annual growth average of 22.25% in the 5-year period from 2008 to 2012.

The United States was at the distant second as the source of imported glasswares at US\$972,000 or 3.91% of Indonesia's total import. It was already 94.72% increase from import in the same period in 2012 of US\$499,000. The full year figure for 2012 was US\$868,000 while the average annual decrease for the period of 2008-2012 was 11.39%.



The third largest import source was Germany with US\$896,000 or 3.60% of Indonesia's total import, followed by Thailand with US\$706,000 (2.84%) and France completed the Top 5 import source of glassware products with US\$655,000 (2.63%).

Indonesia still has a surplus in the trade of glassware goods although the amount kept dwindling in the 5-year period from 2008 to 2012, according to the Central Statistics Agency (BPS). The surplus was US\$49.79 million in the nine months ending in September 2013, decreasing 11.88% from US\$56.51 million in the same period in 2012. The full year surplus was US\$69.70 million in 2012, decreasing from US\$79.30 million in 2011. Indonesia suffered from decreasing surplus at an annual average of 9.22% in the period of 2008-2012.

No	Description	VALUE IN US\$ 000					% Share 2012	% Trend 2008-2012	Jan - Sept (US\$ 000)		% Share 2013	% Change 2013/2012
		2008	2009	2010	2011	2012			2012	2013		
I	Export	123.122	111.404	122.657	109.026	101.509	100,00	3,99	81.379	74.682	100,00	8,23
II	Import	22.231	14.018	19.989	29.721	31.804	100,00	15,81	24,868	24,882	100,00	0,06
III	Balance	100.890	97.386	102.668	79.305	69.705	100,00	-9,02	56.510	49.799	100,00	-11,88
IV	Total Trade	143.353	125.422	142.646	138.747	133.313	100,00	-0,72	106.247	99.564	100,00	-6,29

Source: Central Statistics Agency, prepared by Dit. of Market Dev. & Export Information, DGNEP.

List of Exporters



INTI BALI GLASS, Others

Br. Selat, Ds. Belega – Blahbatuh, Bali,
Indonesia
Phone : (62-361) 952117
Fax : (62-361) 952117
Email : inti_bali_glass@yahoo.co.id
Website : www.intibaliglass.com
Products : *Glassware*

KEDAUNG INDUSTRIAL, PT

Jl.. Kampung Poglar, Kedaung Kalingke,
Jakarta 11710, Indonesia
PO BOX 2716, Jakarta 10027
Phone : (62-21) 6190709, 5402278
Fax : (62-21) 5402277, 5402311
Email : pendency@kedaung.com
Website : www.kedaung.com
Products : *Oth. Glassware*

MEGA INDAH GLASS INDUSTRY, PT

Jl.Aria Jaya Sentika Km. 2,5 No. 3, Pasir
Nangka, Tigaraksa, Banten 15720, Indonesia
Phone : (62-21) 5996565-67, 6922487
Fax : (62-21) 5996569, 6922526
Email : migi@cbn.net.id,
wilton@migiglass.com
Website : www.migiglass.com
Products : *Glassware*

MASPION, PT

Jl.. Kembang Jepun No. 38-40, East Java
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3530333, 8531531, 853699
Fax : (62-31) 3533055, 3533218,
8532606
Email : export@maspion.com,
ipo@maspion.com,
info.hq@maspion.com
Website : www.maspion.com
Products : *Electronic Equipment, Glassware,
Tableware & Kitchenware of
Plastics*

CERA GLASSINDO, PT

Jl.. Hadiah II No. 16 E RW. 011, Komplek Kav.
Polri, Jelambar, Jakarta 11460, Indonesia
Phone : (62-21) 5608845, 5648631
Fax : (62-21) 5608846
Email : infiniti@cbn.net.id
Website : www.ceracraft.com
Products : *Drawn Glass & Blown Glass in
Sheets, Embroidery in The Piece,
in Strips or in Motifs, Glassware,
Oth. Glassware*

KEDAWUNG SUBUR, PT

JL. Raya Rungkut No. 15 - 17 - 60013
Jawa Timur
Phone : (62-31) 8700006, 8700087
Fax : (62-31) 8700544, 8705212
Products : *Carboys, Bottles, Flasks, Jars, Pots,
Phials, Ampoules of Glass,
Glassware*

BALI BAGUS, CV

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Fax : (62-361) 7472227
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balibagusglass@hotmail.com
Website : www.balibagushomeware.com
Products : *Bronze Ring, Glassware, Jewelry*

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ext. 418, 45044872
Fax. : (33-1) - 45045032
Email : atdag-fra@kemendag.go.id

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-10557
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Fax. : (4930) - 47807209
Email : atdag-deu@kemendag.go.id

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