



Konsep Pengembangan Industri Manufaktur 2014-2019

Agus Tjahajana Wirakusumah, Mei 2014

- A. Ekonomi Makro dan Peringkat Daya Saing Indonesia
- B. Keadaan Industri Manufaktur Saat Ini
- C. Situasi Persaingan
- D. Peluang dan Ancaman

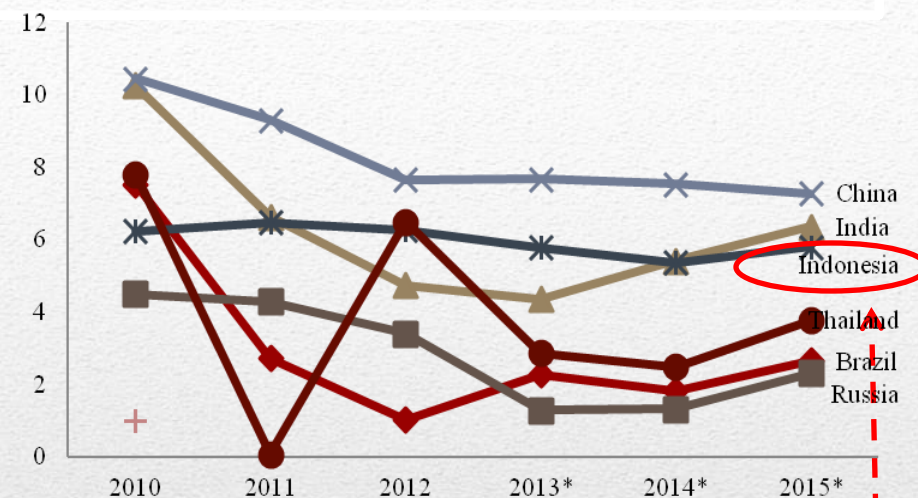
Topik Pembahasan



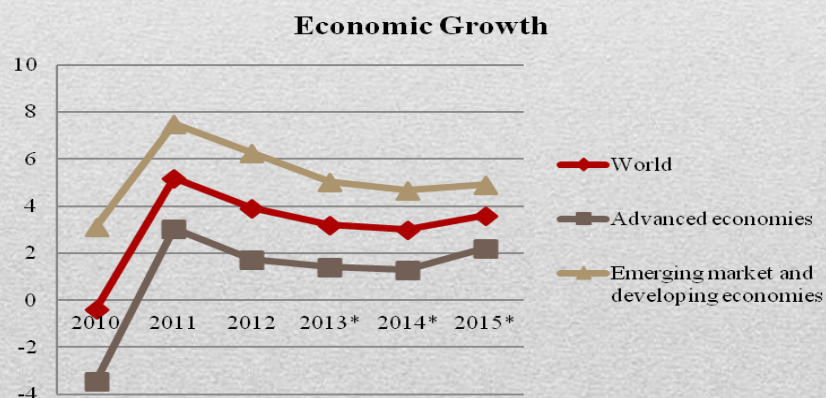
A. Ekonomi Makro dan Peringkat Daya Saing Indonesia

1. Kondisi Perekonomian Dunia

	2011	2012	Projections	
			2013	2014
Growth in Real GDP per Capita				
Advanced Economies	1.1	0.9	0.7	1.5
United States	1.1	2.0	0.8	1.7
Euro Area	1.3	−0.9	−0.6	0.8
Germany	3.4	0.7	0.7	1.6
France	1.5	−0.5	−0.3	0.5
Italy	−0.1	−2.7	−2.1	0.5
Spain	−0.1	−1.7	−1.1	0.4
Japan	−0.5	2.2	2.2	1.5
United Kingdom	0.4	−0.6	0.6	1.1
Canada	1.4	0.6	0.6	1.2
Other Advanced Economies ³	2.3	0.9	1.4	2.3
<i>Memorandum</i>				
Major Advanced Economies	1.0	1.2	0.7	1.4



	2011	2012	Projections	
			2013	2014
Emerging Market and Developing Economies	5.2	3.9	3.5	4.1
Central and Eastern Europe	5.0	1.0	1.5	2.3
Commonwealth of Independent States ¹	4.9	3.5	2.1	3.4
Developing Asia	6.9	5.5	5.5	5.6
Latin America and the Caribbean	3.4	1.8	1.6	2.0
Middle East, North Africa, Afghanistan, and Pakistan	1.7	2.3	0.2	1.5
Middle East and North Africa	1.7	2.2	0.1	1.7
Sub-Saharan Africa	3.4	2.6	2.7	3.7



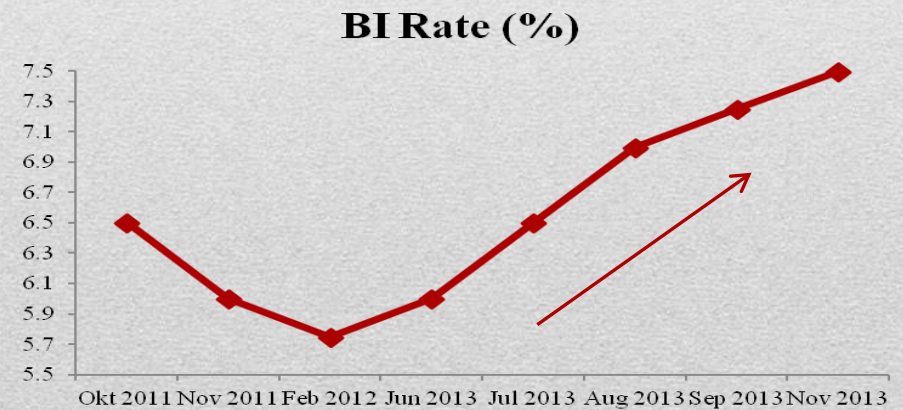
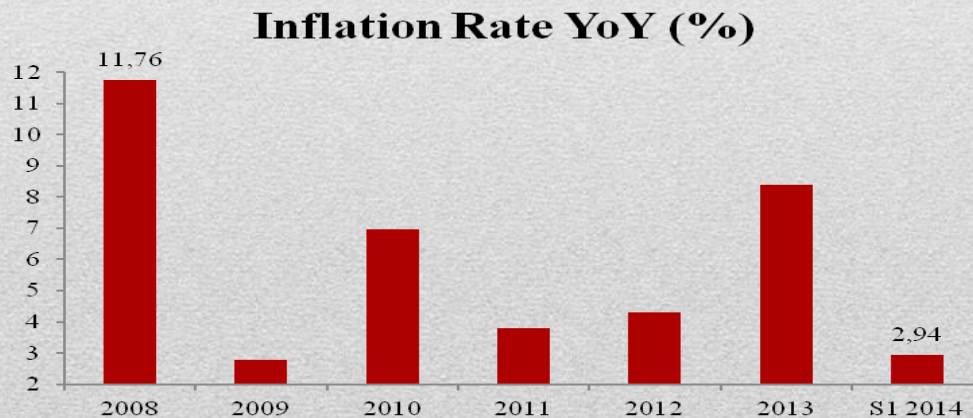
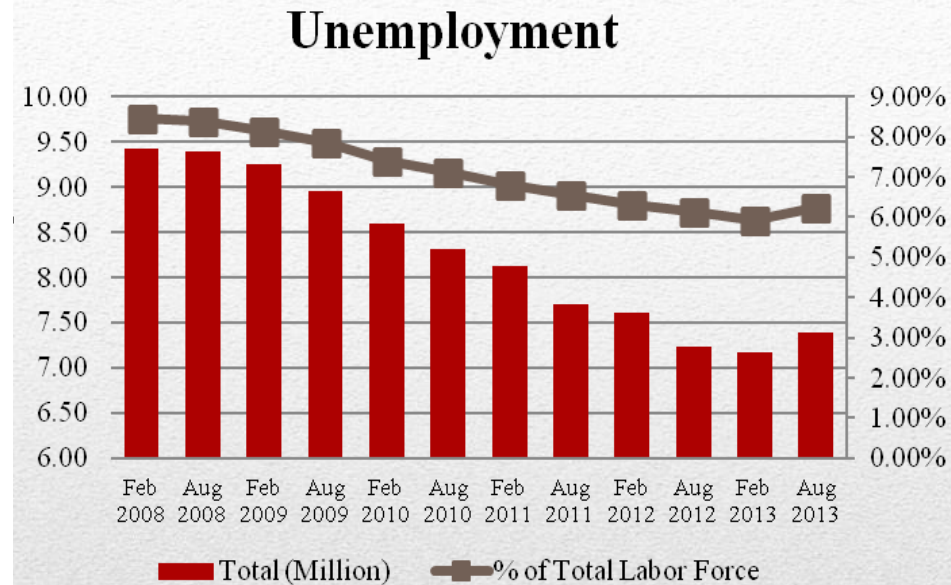
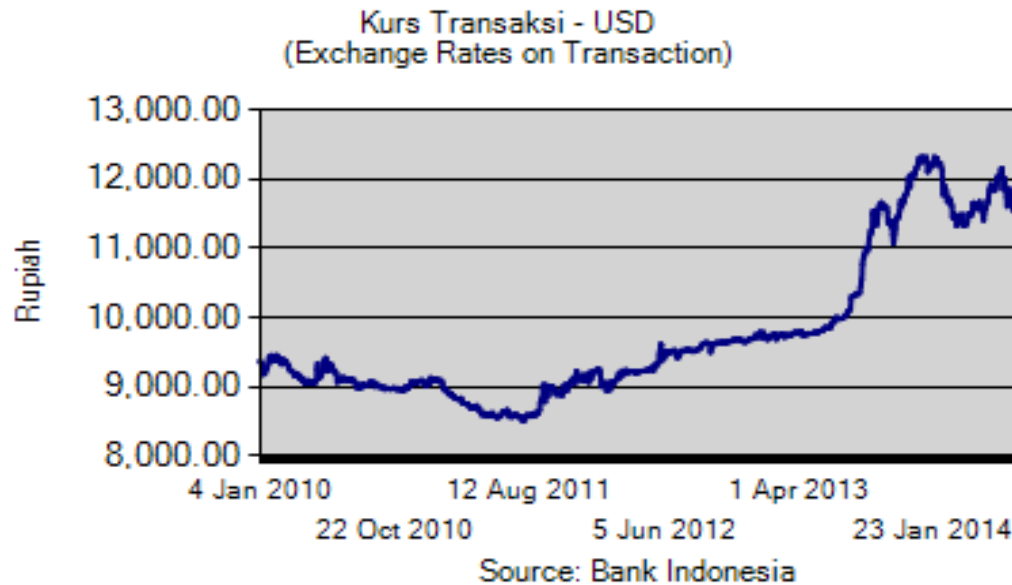
Source World Economic Outlook October 2013: Transition and Tension, IMF

2. Ekonomi Indonesia



Source: BPS, processed

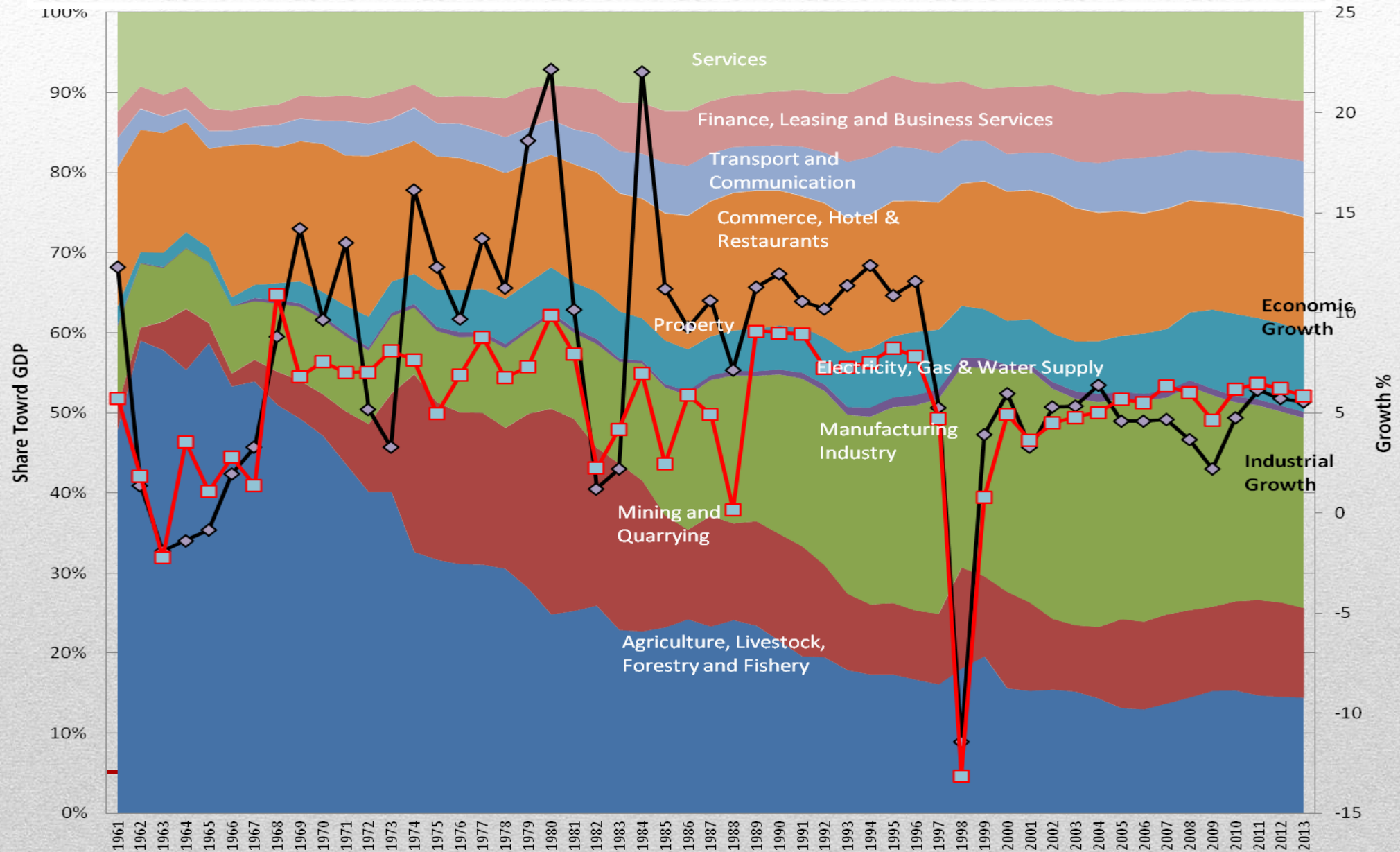
Ekonomi Indonesia (2)



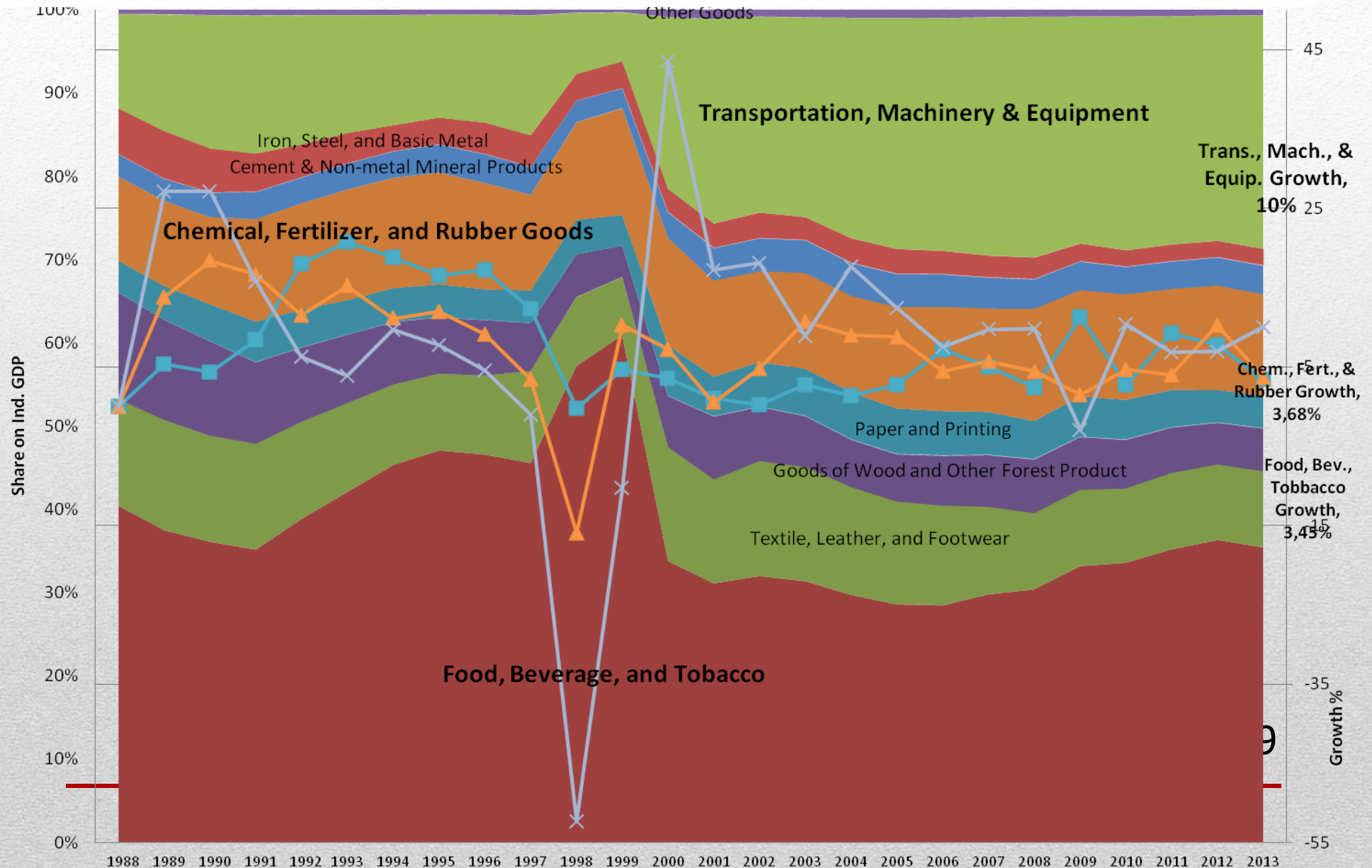
Source: BPS, processed

B. Keadaan Industri Manufaktur Saat Ini

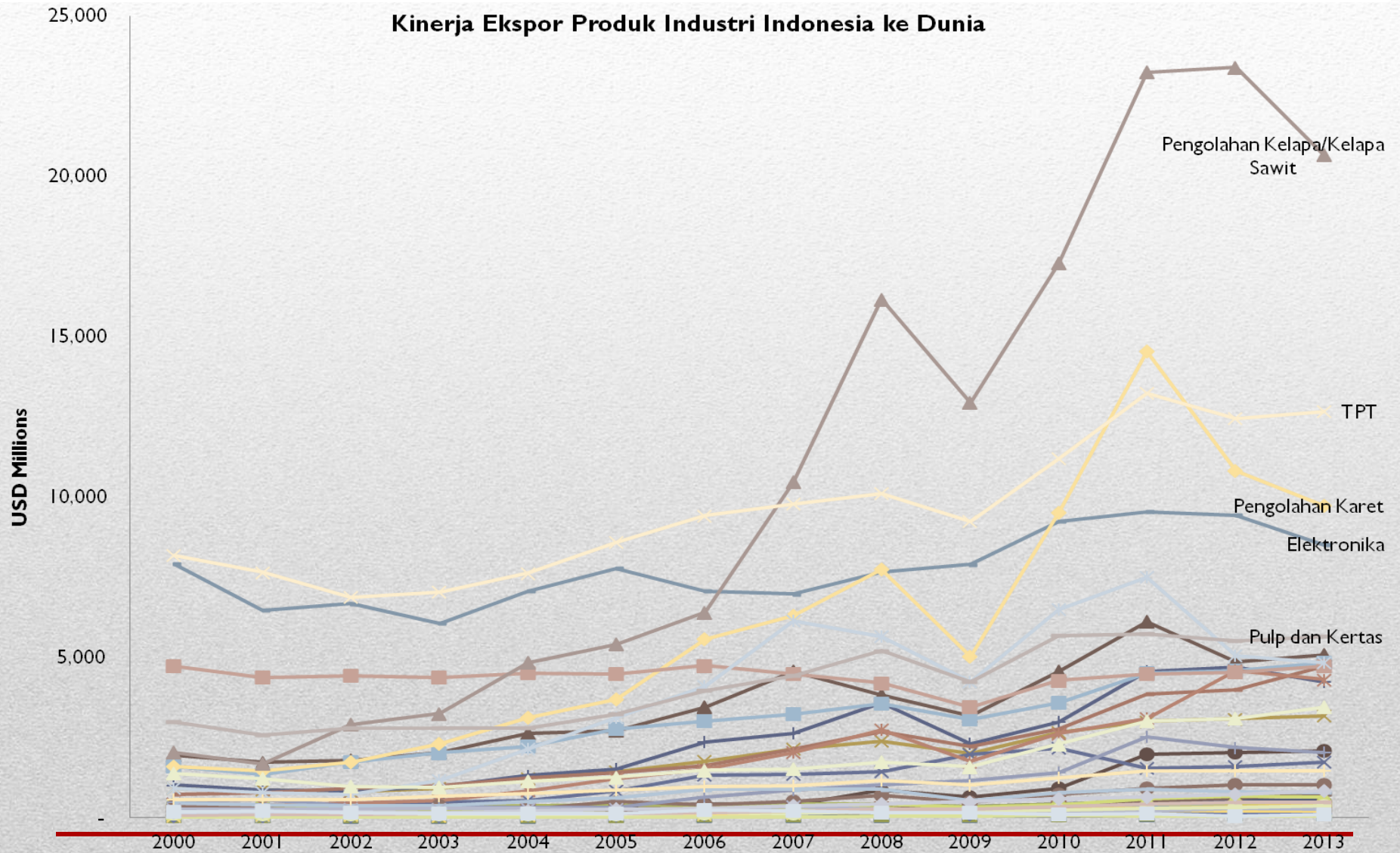
1. Pertumbuhan Ekonomi Vs Pertumbuhan Industri



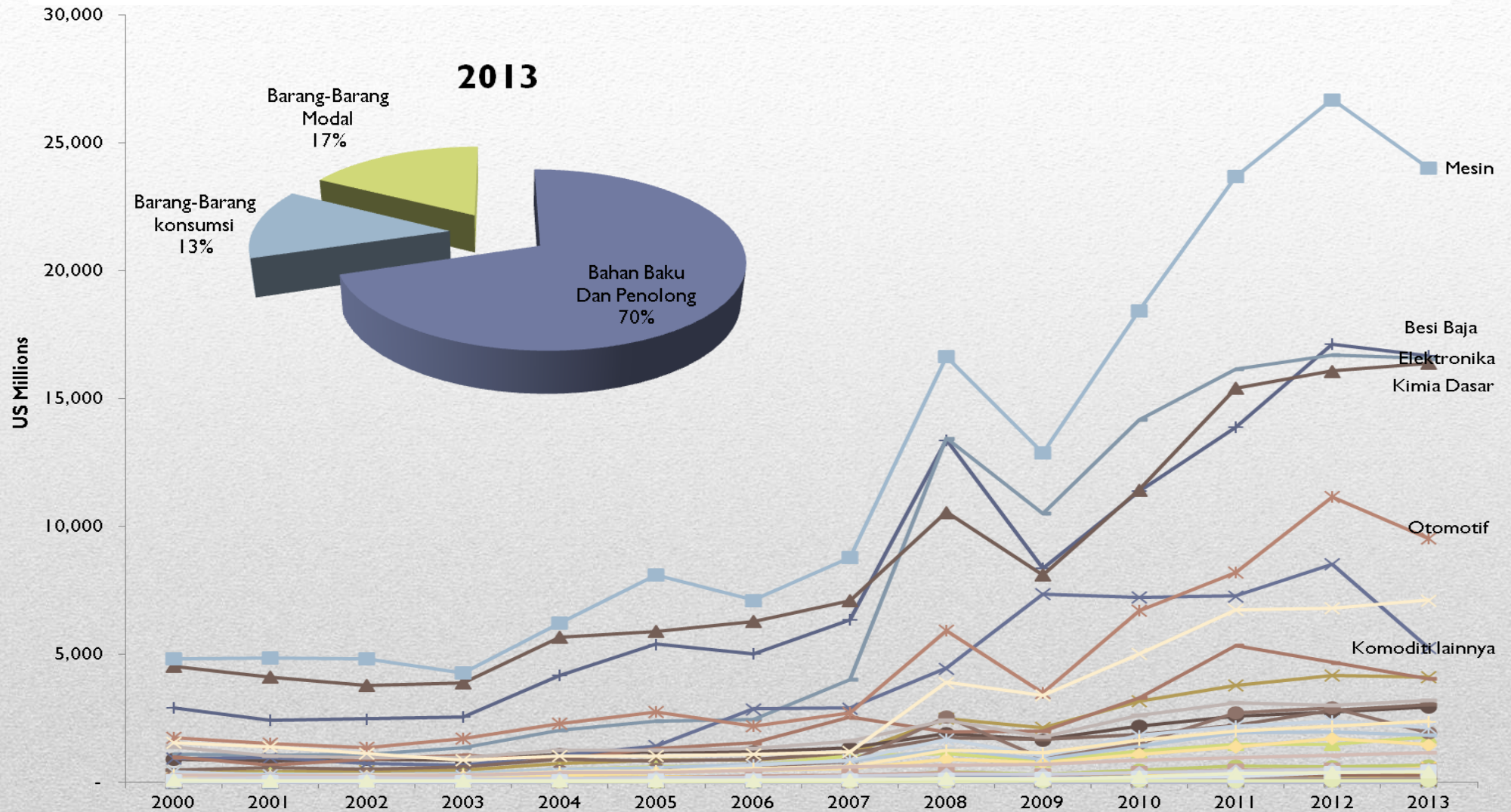
2. Kinerja Sub Sektor Industri



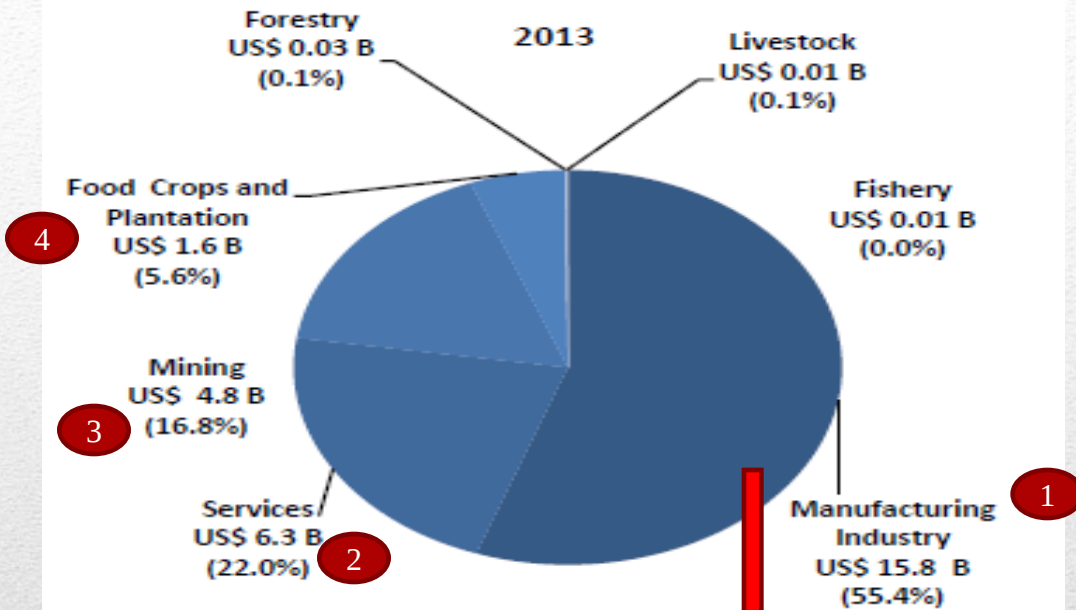
3. Ekspor Produk Industri



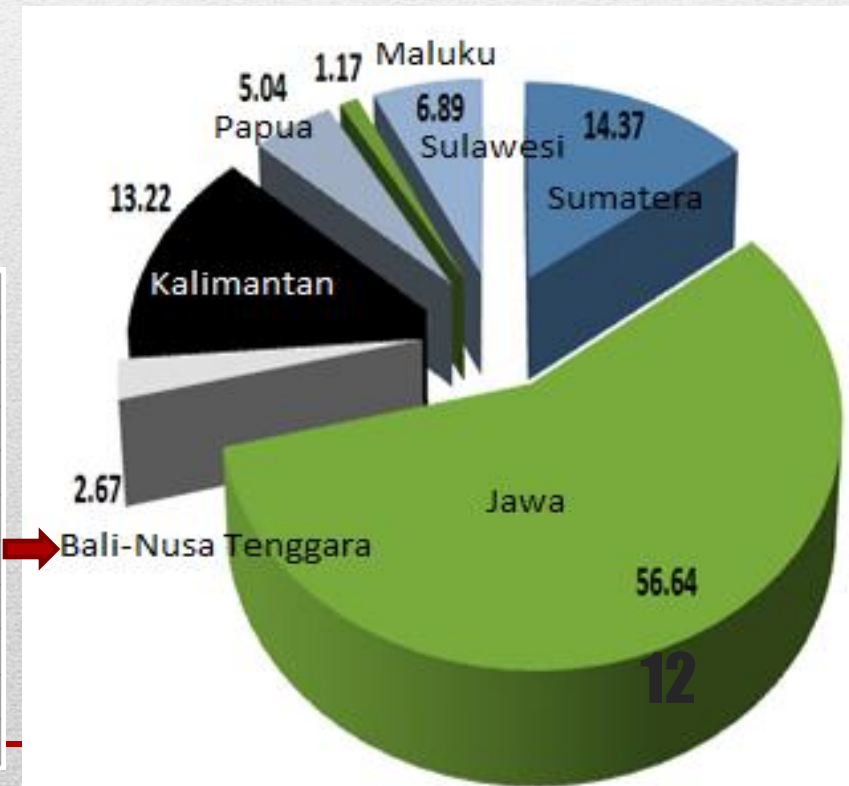
4. Impor Produk Industri



5. Investasi Sektor Industri (2013)



NO.	WILAYAH	Nilai Investasi (Rp Miliar)		
		PMDN	PMA	Total
I	SUMATERA	9.149,57	16.428,60	25.578,17
II	JAWA	26.552,02	74.233,83	100.785,85
III	BALI & NUSA TENGGARA	1.757,04	2.994,20	4.751,24
IV	KALIMANTAN	11.465,47	12.056,52	23.522,00
V	SULAWESI	1.447,15	7.514,27	8.961,42
VI	MALUKU	445,19	1.638,70	2.083,89
VII	PAPUA	354,67	11.905,22	12.259,89
	JUMLAH	51.171,10	126.771,35	177.942,45

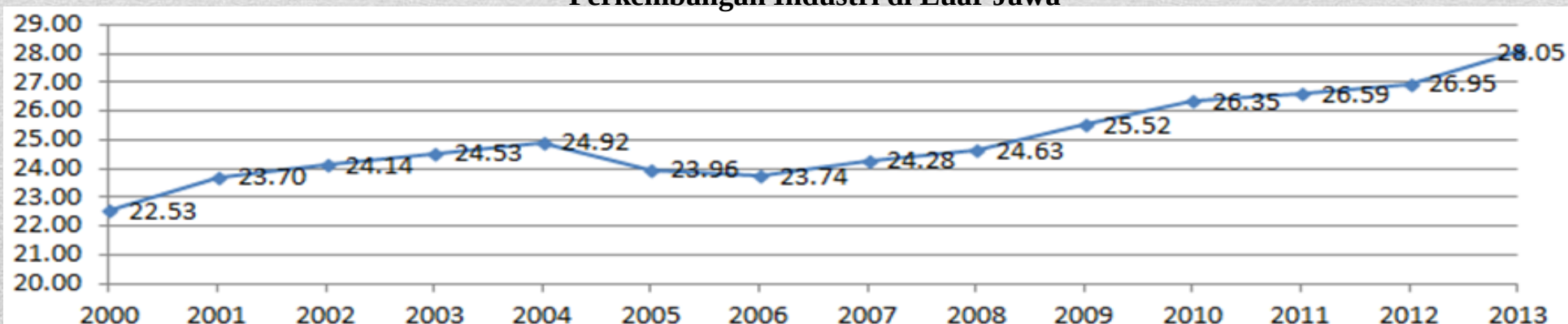


6. Kontribusi Output Sektor Industri

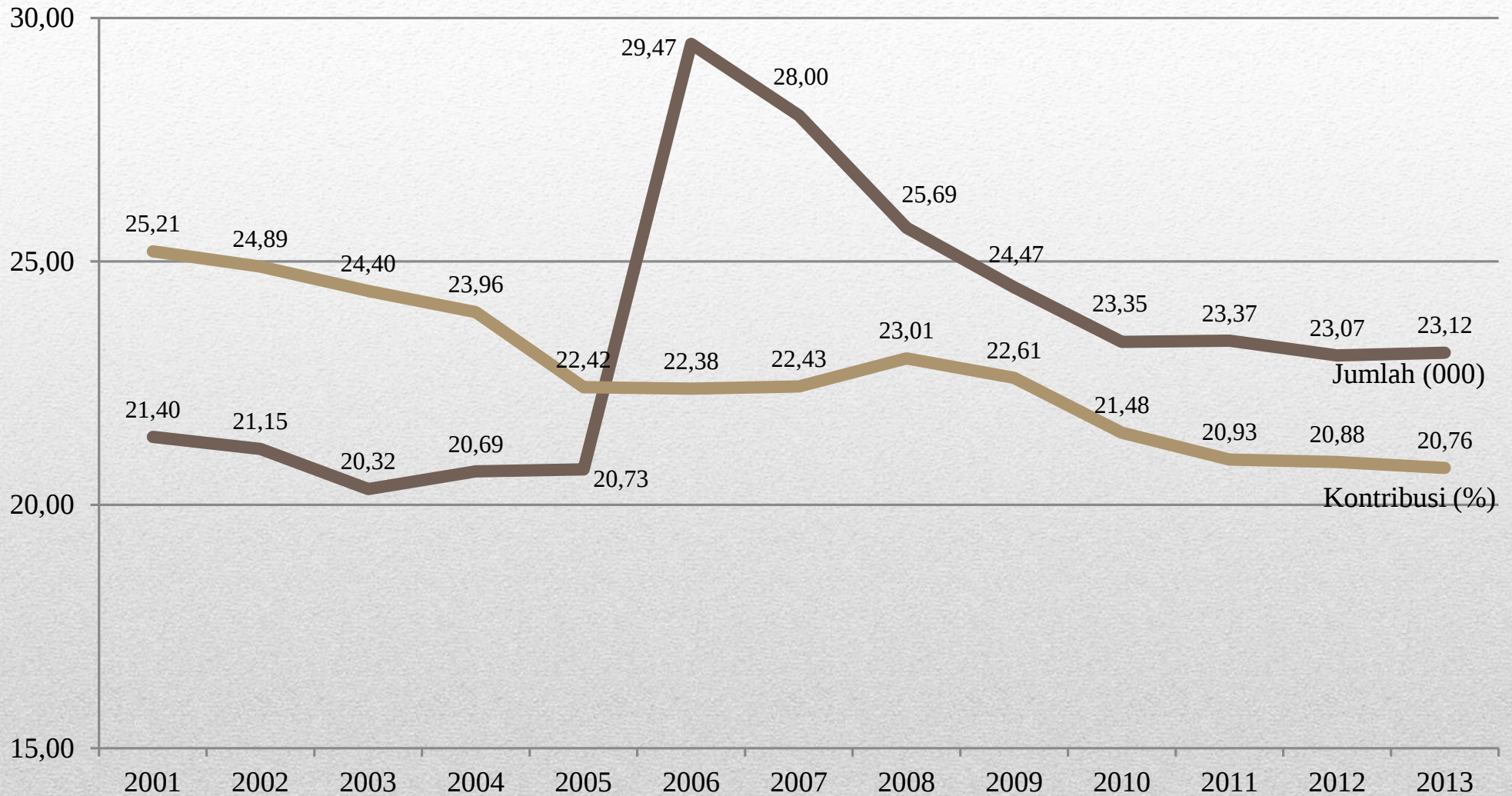
Wilayah	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Sumatera	15.28	16.65	17.16	17.74	18.14	17.58	17.56	18.08	18.36	19.10	19.94	20.19	20.42	21.20
Kalimantan	4.20	4.02	3.98	3.81	3.78	3.53	3.34	3.32	3.27	3.25	3.17	3.15	3.24	3.28
Jawa	77.47	76.30	75.86	75.47	75.08	76.04	76.26	75.72	75.37	74.48	73.65	73.41	73.05	71.95
Bali	0.50	0.51	0.54	0.52	0.51	0.49	0.50	0.52	0.54	0.57	0.56	0.54	0.55	0.56
Nusa Tenggara	0.20	0.19	0.19	0.19	0.19	0.19	0.18	0.18	0.18	0.19	0.19	0.18	0.18	0.21
Sulawesi	1.99	1.98	1.94	1.95	1.97	1.87	1.87	1.89	1.99	2.08	2.16	2.19	2.24	2.41
Kep. Maluku	0.14	0.13	0.12	0.11	0.10	0.09	0.09	0.09	0.08	0.10	0.10	0.10	0.10	0.12
Papua	0.21	0.21	0.21	0.22	0.22	0.21	0.21	0.21	0.21	0.23	0.23	0.23	0.23	0.27
Nasional	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Wilayah	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Jawa	77.47	76.30	75.86	75.47	75.08	76.04	76.26	75.72	75.37	74.48	73.65	73.41	73.05	71.95
Luar Jawa	22.53	23.70	24.14	24.53	24.92	23.96	23.74	24.28	24.63	25.52	26.35	26.59	26.95	28.05
Nasional	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Perkembangan Industri di Luar Jawa



7 . Jumlah Manufaktur vs Kontribusi terhadap PDB

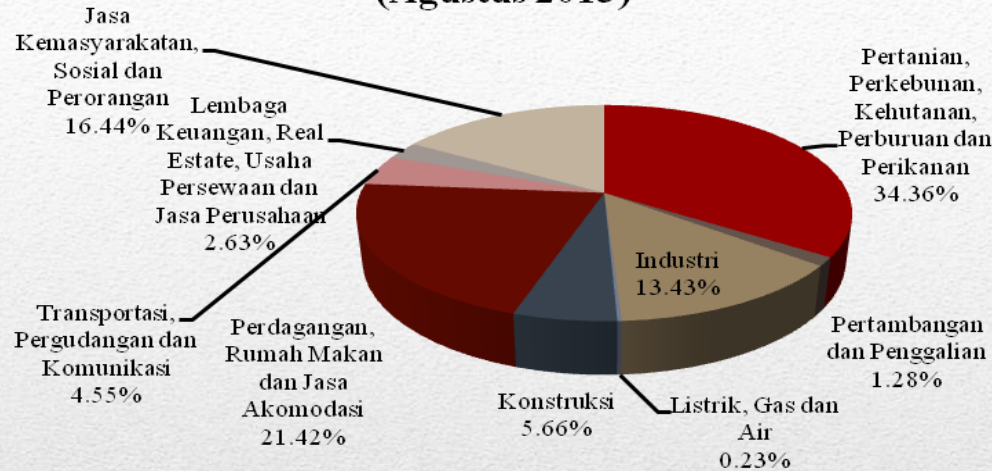


Sumber : BPS diolah

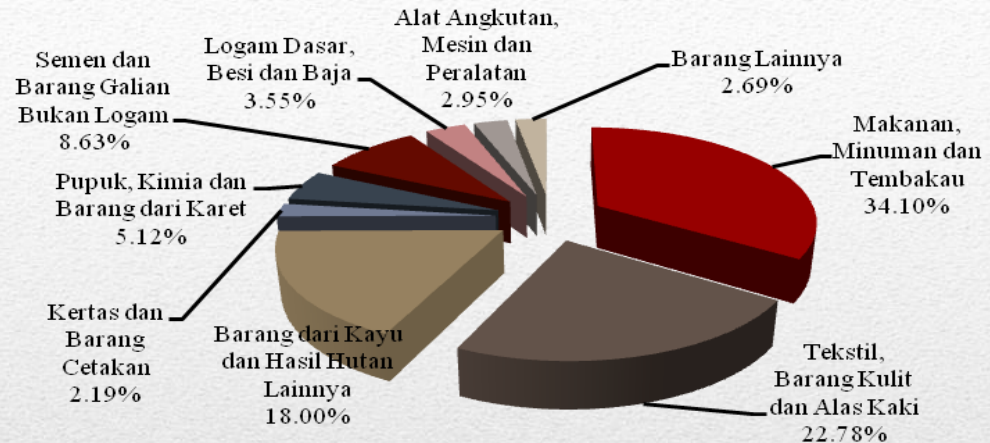
*) Survey Industri Besar Sedang

8. Penyerapan Tenaga Kerja

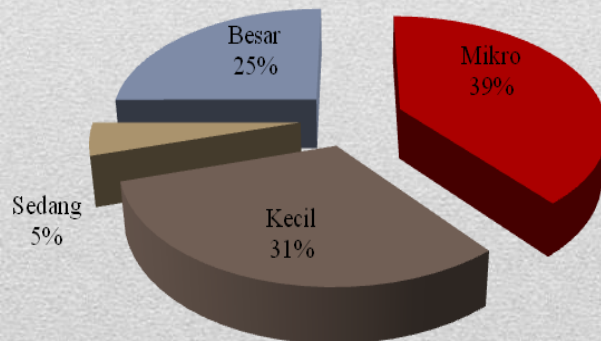
**Distribusi Tenaga Kerja Per Sektor Ekonomi
(Agustus 2013)**



**Tenaga Kerja Berdasarkan Sektor Industri
(2013)**

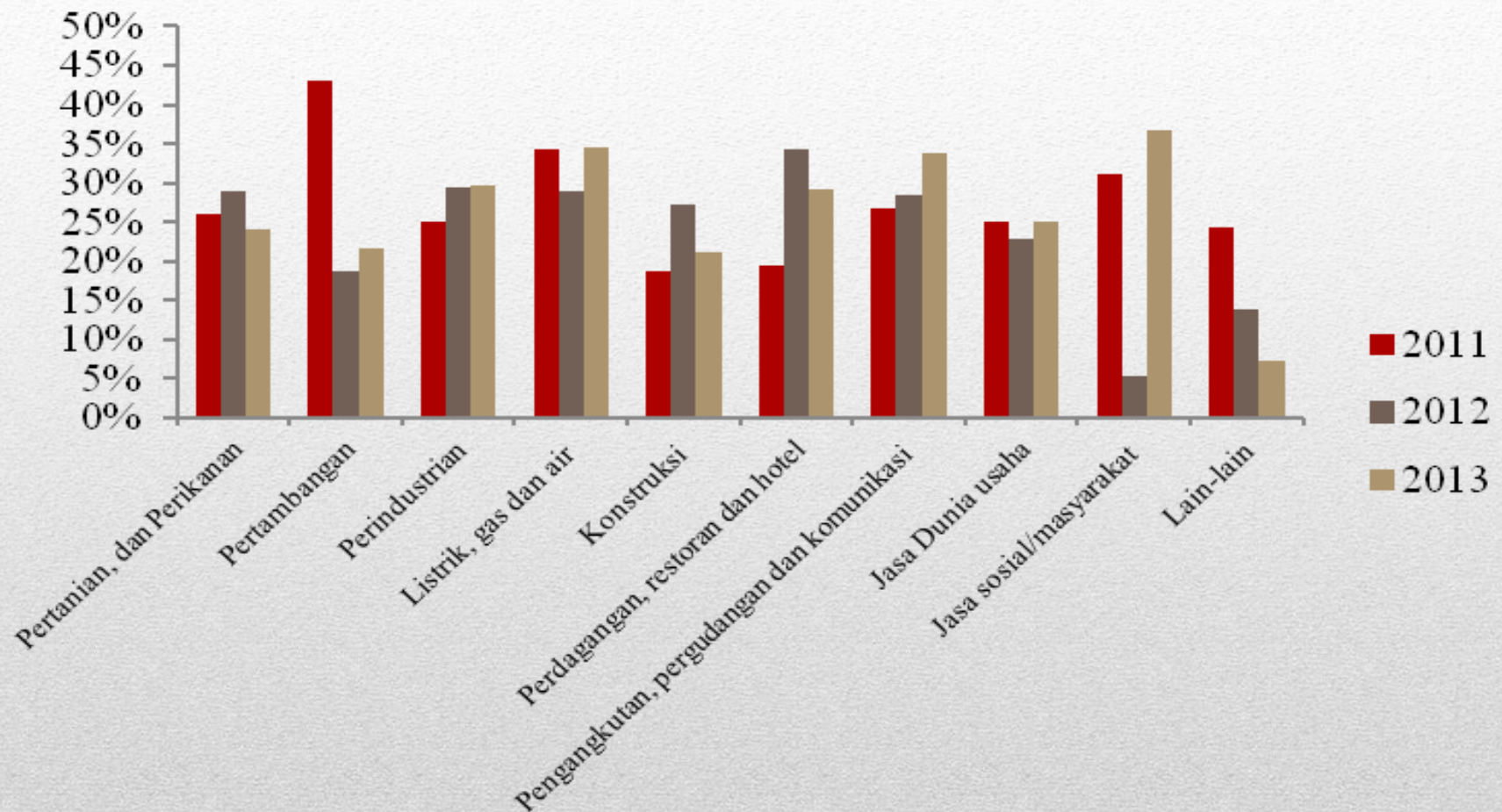


**Tenaga Kerja Berdasarkan Skala Industri
(2013)**



- Industri menyumbang penyerapan tenaga kerja tahun 2013 sekitar 14,8 juta orang;
- Industri Mikro dan Kecil menyerap tenaga kerja sekitar 10,3 Juta (70%), industri Menengah 700 ribu (5%), dan industri berskala besar 3,8 juta (25%);
- Cabang industri yang menyerap tenaga kerja dalam jumlah yang besar yaitu, makanan minuman dan tembakau (4,7 juta orang), TPT (3,1 juta orang), dan barang kayu dan hasil hutan lainnya (2,5 juta orang);

9. Pertumbuhan Kredit Perbankan per Sektor Ekonomi



- Pertumbuhan kredit perbankan untuk sektor industri mengalami pertumbuhan positif dan semakin besar dalam 3 tahun terakhir

11. Peran Ekspor Indonesia di Dunia

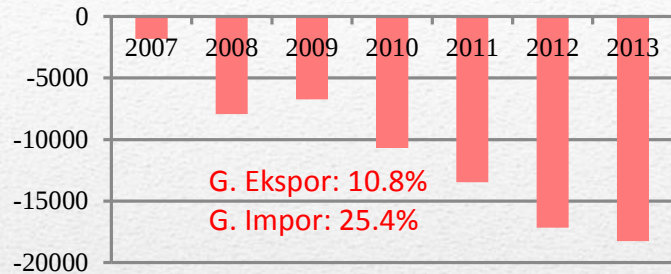


- Selama 2003-2007, sektor industri Logam Dasar memiliki pertumbuhan ekspor yang mampu mengimbangi kebutuhan Logam Dasar dunia walaupun nilainya belum sebesar sektor industri Barang dari Logam, Mesin dan Peralatannya

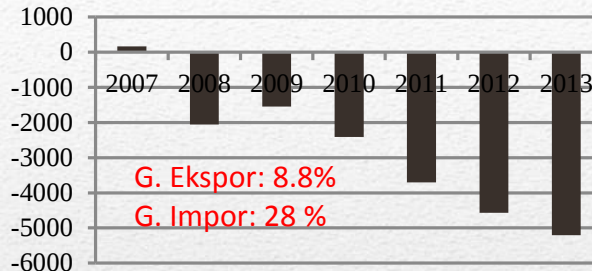
Neraca Perdagangan Produk Industri Indonesia Vs. Negara Mitra FTA (2007 - 2013)

(dalam Juta US\$)

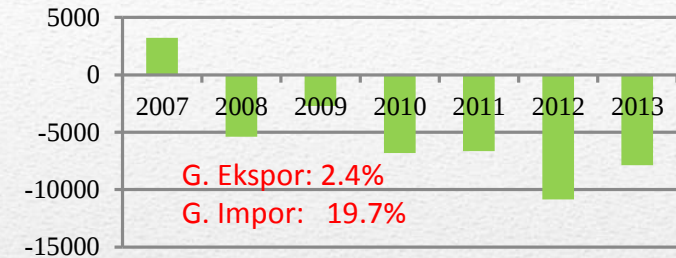
China



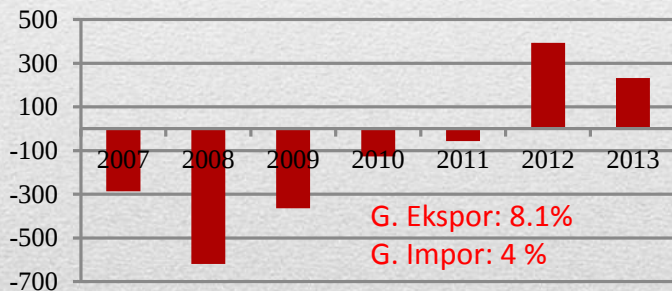
Korea



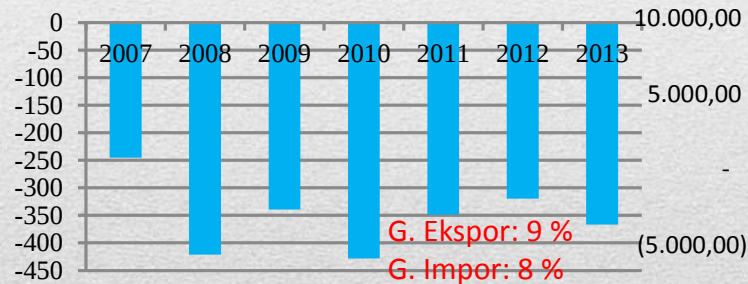
Jepang



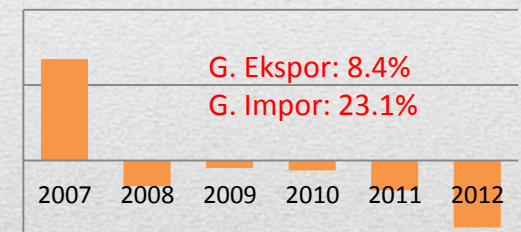
Australia



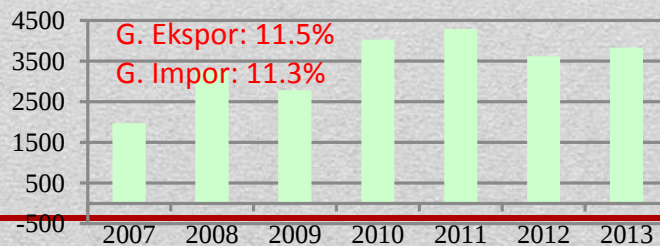
Selandia Baru



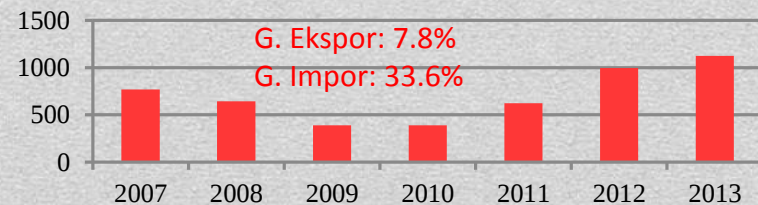
ASEAN



India



Pakistan



Share of countries in value of all global value chains of manufactures

	1995	2008	2008 minus 1995	Mftrs GVC workers as (%) share of all workers in the economy	
				1995	2008
United States	19,9	15,8	-4,1	16,04	11,12
Japan	17,5	7,8	-9,7	22,55	19,36
Germany	9,4	7,6	-1,7	26,83	26,44
France	4,4	3,8	-0,6	22,05	18,75
United Kingdom	3,8	3,0	-0,9	20,12	12,60
Italy	4,4	4,1	-0,3	29,09	25,51
Spain	1,9	2,0	0,0	23,23	17,48
Canada	1,9	2,2	0,3	20,76	16,02
Australia	1,0	1,3	0,3	18,23	14,54
South Korea	2,1	1,8	-0,3	29,69	22,83
Netherlands	1,4	1,4	-0,1	22,80	19,02
Other ten high-income	5,9	5,3	-0,6		
Total all high-income	73,8	56,0	-17,8		
China	4,2	12,8	8,6	31,73	33,35
Russian Federation	1,2	2,8	1,6	24,73	21,91
Brazil	2,5	3,0	0,6	29,64	28,74
India	1,7	2,6	0,9	27,92	27,27
Mexico	1,5	2,4	0,9	30,26	24,45
Turkey	1,1	1,4	0,3	27,12	30,42
Indonesia	1,3	1,3	0,0	32,10	25,60
Rest of world	12,7	17,5	4,9		
World minus all high-income	26,2	44,0	17,8		
World	100,0	100,0	0,0		

* Sumber: WIOD, diolah Kemenperin

Tingkat Penguasaan Teknologi Industri dari Segi Produksi

KLUI	Uraian	Low	Medium Low	Medium High	High
37	Daur ulang				
36	Industri furnitur dan industri pengolahan lainnya	■ ■ ■			
35	Industri alat angkutan, selain kendaraan bermotor roda empat atau lebih		●	▲ ■ ■ ■	
34	Industri kendaraan bermotor			★ ■ ■ ■ ■	
33	Industri peralatan kedokteran, alat-alat ukur, peralatan navigasi, peralatan optik, jam dan lonceng				●
32	Industri radio, televisi, dan peralatan komunikasi, serta perlengkapannya				■ ■ ■ ■
31	Industri mesin listrik lainnya dan perlengkapannya			■ ■ ■ ■	
30	Industri mesin dan peralatan kantor, akuntansi, dan pengolahan data				
29	Industri mesin dan perlengkapannya			■ ■ ■	
28	Industri barang dari logam, kecuali mesin dan peralatannya		▲ ■		
27	Industri logam dasar		★ ■ ■ ■		
26	Industri barang galian bukan logam		▲		
25	Industri karet, barang dari karet, dan barang dari plastik		★ ★ ■ ■ ■ ■		
24	Industri kimia dan barang-barang dari bahan kimia			★ ★ ★ ■	▲ ■ ■
23	Industri batu bara, pengilangan minyak bumi dan pengolahan gas bumi, barang-barang dari hasil pengilangan		●		
22	Industri penerbitan, percetakan dan reproduksi media rekaman	■			
21	Industri kertas, barang dari kertas, dan sejenisnya	★ ■			
20	Industri kayu, barang-barang dari kayu (tidak termasuk furnitur), dan barang-barang anyaman dari rotan, bambu,	■ ■ ■			
19	Industri kulit, barang dari kulit, dan alas kaki	■ ■ ■			
18	Industri pakaian jadi	■ ■ ■ ■			
17	Industri tekstil	★ ■			
16	Industri pengolahan tembakau	★ ■			
15	Industri makanan dan minuman	★ ★ ★ ■ ■ ■ ■ ■			
Total (trillion Rp)		918,6	488,3	600,2	116,4

Legend:

★ = 100

▲ = 50

■ = 10

● < 10

Tingkat Penguasaan Teknologi Industri dari Segi Ekspor

KLUI	Uraian	Low	Medium Low	Medium High	High
37	Daur ulang				
36	Industri furnitur dan industri pengolahan lainnya	●			
35	Industri alat angkutan, selain kendaraan bermotor roda empat atau lebih		●		
34	Industri kendaraan bermotor			●	
33	Industri peralatan kedokteran, alat-alat ukur, peralatan navigasi, peralatan optik, jam dan lonceng	●			
32	Industri radio, televisi, dan peralatan komunikasi, serta perlengkapannya				
31	Industri mesin listrik lainnya dan perlengkapannya				
30	Industri mesin dan peralatan kantor, akuntansi, dan pengolahan data			● ●	● ● ●
29	Industri mesin dan perlengkapannya			●	
28	Industri barang dari logam, kecuali mesin dan peralatannya				● ● ● ●
27	Industri logam dasar		▲ ● ● ●	■ ● ●	● ● ● ●
26	Industri barang galian bukan logam	▲ ▲ ▲ ● ● ●	●	▲ ▲ ▲ ▲	
25	Industri karet, barang dari karet, dan barang dari plastik				●
24	Industri kimia dan barang-barang dari bahan kimia	▲ ●	● ● ● ●	▲	●
23	Industri batu bara, pengilangan minyak bumi dan pengolahan gas bumi, barang-barang dari hasil pengilangan				
22	Industri penerbitan, percetakan dan reproduksi media rekaman				
21	Industri kertas, barang dari kertas, dan sejenisnya	▲ ■		●	
20	Industri kayu, barang-barang dari kayu (tidak termasuk furnitur), dan barang-barang anyaman dari rotan, bambu,				
19	Industri kulit, barang dari kulit, dan alas kaki	■ ● ● ●			
18	Industri pakaian jadi				
17	Industri tekstil				
16	Industri pengolahan tembakau				
15	Industri makanan dan minuman	■			
Total (trillion Rp)		761	192	624	91

Legend:
 ▲ = 100
 ■ = 50
 ● = 10

Kandungan Teknologi Impor Produk Industri

KLUI	Uraian	Low	Medium Low	Medium High	High
37	Daur ulang				
36	Industri furnitur dan industri pengolahan lainnya				
35	Industri alat angkutan, selain kendaraan bermotor roda empat atau lebih		 		  
34	Industri kendaraan bermotor			   	
33	Industri peralatan kedokteran, alat-alat ukur, peralatan navigasi, peralatan optik, jam dan lonceng				
32	Industri radio, televisi, dan peralatan komunikasi, serta perlengkapannya				
31	Industri mesin listrik lainnya dan perlengkapannya				
30	Industri mesin dan peralatan kantor, akuntansi, dan pengolahan data			   	
29	Industri mesin dan perlengkapannya			 	
28	Industri barang dari logam, kecuali mesin dan peralatannya				
27	Industri logam dasar		  	    	   
26	Industri barang galian bukan logam			      	
25	Industri karet, barang dari karet, dan barang dari plastik				
24	Industri kimia dan barang-barang dari bahan kimia		  	 	
23	Industri batu bara, pengilangan minyak bumi dan pengolahan gas bumi, barang-barang dari hasil pengilangan				
22	Industri penerbitan, percetakan dan reproduksi media rekaman				
21	Industri kertas, barang dari kertas, dan sejenisnya	    			
20	Industri kayu, barang-barang dari kayu (tidak termasuk furnitur), dan barang-barang anyaman dari rotan, bambu,				
19	Industri kulit, barang dari kulit, dan alas kaki	  			
18	Industri pakaian jadi				
17	Industri tekstil				
16	Industri pengolahan tembakau				
15	Industri makanan dan minuman	 			
Total (trillion Rp)		213	217	932	192

Legenda:

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 50,

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Note : KII, as at July 2013

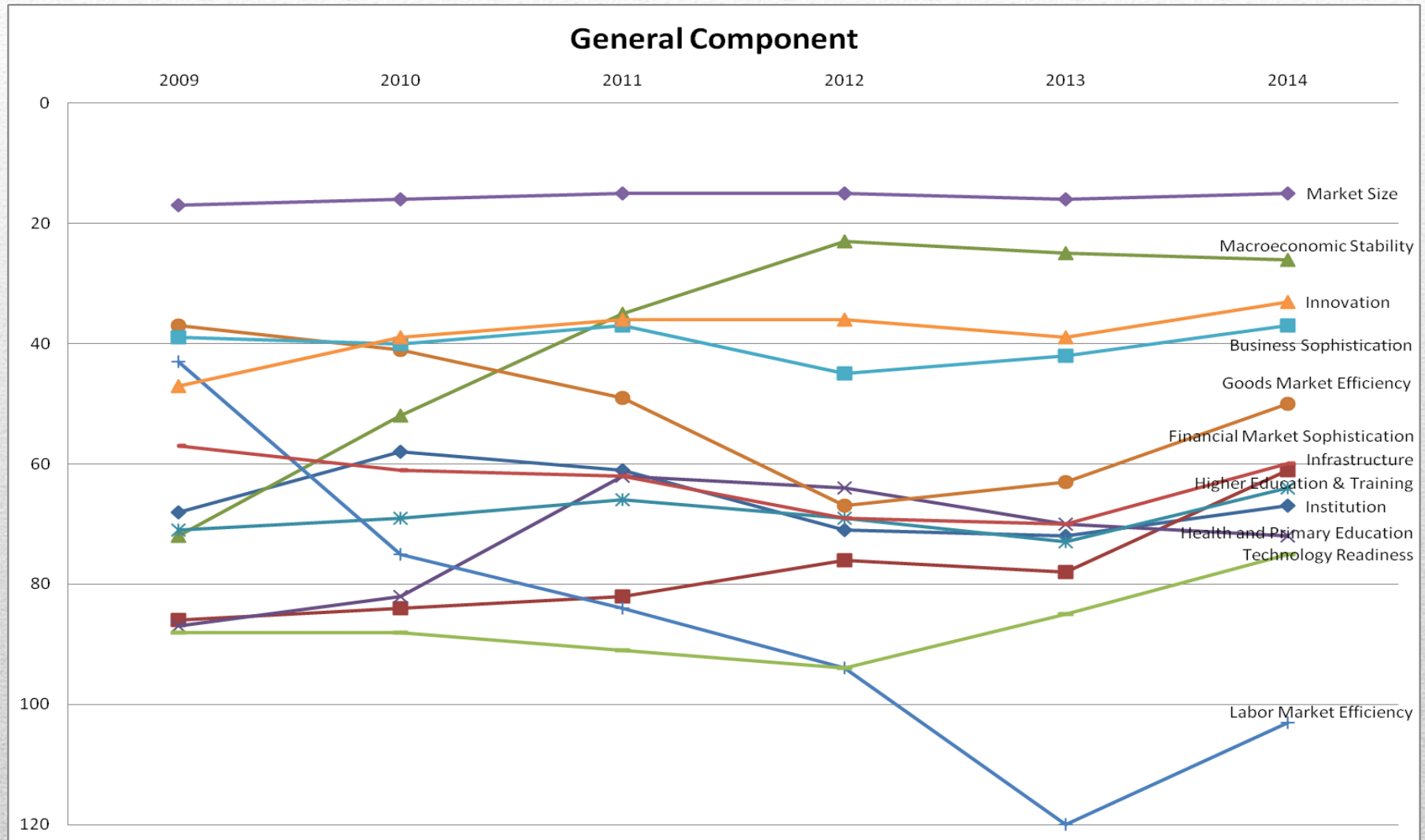
C. Situasi Persaingan

1. Daya Saing Ekonomi Indonesia

Perbandingan Peringkat Negara (World Economy Forum - GCI 2013 - 2014)

	Indonesia	S. Korea	China	Thailand	Brazil	India	Russia	Vietnam	Rank/8
Institution	67	75	47	78	80	72	121	98	2
Infrastructure	61	11	48	47	71	85	45	82	5
Macroeconomic Stability	26	9	10	31	75	110	19	87	3
Health and Primary Education	72	18	40	81	89	102	71	67	5
Higher Education & Training	64	19	70	66	72	91	47	95	4
Goods Market Efficiency	50	33	61	34	123	85	126	74	3
Labor Market Efficiency	103	78	34	62	92	99	72	56	8
Financial Market Sophistication	60	81	54	32	50	19	121	93	5
Technology Readiness	75	22	85	78	55	98	59	102	4
Market Size	15	12	2	22	9	3	7	36	6
Business Sophistication	37	24	45	40	39	42	107	98	2
Innovation	33	17	32	66	55	41	78	76	3
Overall Ranks	38	25	29	37	56	60	64	70	4

Perkembangan Peringkat Indonesia



IMD WORLD COMPETITIVENESS YEARBOOK 2014 - OVERALL RANKING							
Country	Rank			Country	Rank		
	2014	2013	Change		2014	2013	Change
USA	1	1	—	Chile	31	30	→
Switzerland	2	2	—	Kazakhstan	32	34	→
Singapore	3	5	→	Czech Republic	33	35	→
Hong Kong	4	3	→	Lithuania	34	31	→
Sweden	5	4	→	Latvia	35	41	→
Germany	6	9	→	Poland	36	33	→
Canada	7	7	—	Indonesia	37	39	→
UAE	8	8	—	Russia	38	42	→
Denmark	9	12	→	Spain	39	45	→
Norway	10	6	→	Turkey	40	37	→
Luxembourg	11	13	→	Mexico	41	32	→
Malaysia	12	15	→	Philippines	42	38	→
Taiwan	13	11	→	Portugal	43	46	→
Netherlands	14	14	—	India	44	40	→
Ireland	15	17	→	Slovak Republic	45	47	→
United Kingdom	16	18	→	Italy	46	44	→
Australia	17	16	→	Romania	47	55	→
Finland	18	20	→	Hungary	48	50	→
Qatar	19	10	→	Ukraine	49	49	—
New Zealand	20	25	→	Peru	50	43	→
Japan	21	24	→	Colombia	51	48	→
Austria	22	23	→	South Africa	52	53	→
China Mainland	23	21	→	Jordan	53	56	→
Israel	24	19	→	Brazil	54	51	→
Iceland	25	29	→	Slovenia	55	52	→
Korea	26	22	→	Bulgaria	56	57	→
France	27	28	→	Greece	57	54	→
Belgium	28	26	→	Argentina	58	59	→
Thailand	29	27	→	Croatia	59	58	→
Estonia	30	36	→	Venezuela	60	60	—

2. Perbandingan Daya Saing Industri Terhadap Indonesia

		Agriculture (%)	Mining (%)	Manuf. (%)	Services (%)
USA <	2011	261	339	1015	2483
	2014	675	1142	2403	7006
Korea <	2011	33	3	299	152
	2014	56	5	326	231
Japan <	2011	94	28	682	910
	2014	194	61	1248	1863
India <	2011	223	57	229	230
	2014	363	101	350	380
China <	2011	776	477	2238	1041
	2014	2020	1447	5639	2931
EU <	2011	2474	616	7407	7814
	2014	3665	1075	10663	13806

* Sumber: WIOD, diolah Kemenperin

3. Daya Saing Indonesia di ASEAN

Peringkat Trade Performance Index Vs. Indonesia 2010

SITC Rev. 3	INDONESIA								Jumlah Produk Unggul Indonesia Terhadap Negara ASEAN
	Fresh food	Process ed food	Wood products	Textiles	Chemicals	Leather products	Basic manufact ures	Non-electronic machinery	
Rank of Current Index (Indonesia)	36	31	9	16	40	12	63	69	
Brunei	Menang (175)	-	-	-	Menang (92)	-	Menang (125)	Menang (127)	9
Malaysia	Menang (64)	Kalah (18)	Kalah (5)	Kalah (13)	Kalah (22)	Menang (35)	Kalah (36)	Kalah (36)	4
Thailand	Kalah (9)	Kalah (12)	Menang (18)	Kalah (5)	Kalah (12)	Kalah (5)	Kalah (40)	Kalah (32)	2
Phillipines	Menang (99)	Menang (87)	Menang (88)	Menang (73)	Menang (77)	Menang (96)	Menang (80)	Menang (77)	12
Singapore	Kalah (32)	Kalah (8)	Menang (49)	Menang (31)	Kalah (2)	Menang (24)	Kalah (31)	Kalah (15)	5
Vietnam	Kalah (12)	Menang (83)	Menang (79)	Menang (38)	Menang (67)	Kalah (2)	Kalah (51)	Menang (72)	9
Cambodia	Menang (154)	Menang (123)	Menang (132)	Menang (124)	Menang (133)	Menang (48)	Menang (134)	Menang (123)	11
Myanmar	Menang (66)	Menang (141)	Menang (68)	Menang (131)	Menang (153)	Menang (95)	Menang (149)	Menang (150)	14
Laos	Menang (120)	Menang (152)	Menang (85)	-	Menang (143)	Menang (88)	Menang (110)	Menang (134)	12
Indonesia Unggul Atas Negara ASEAN	6	5	7	5	6	6	5	6	

Peringkat Trade Performance Index (2)

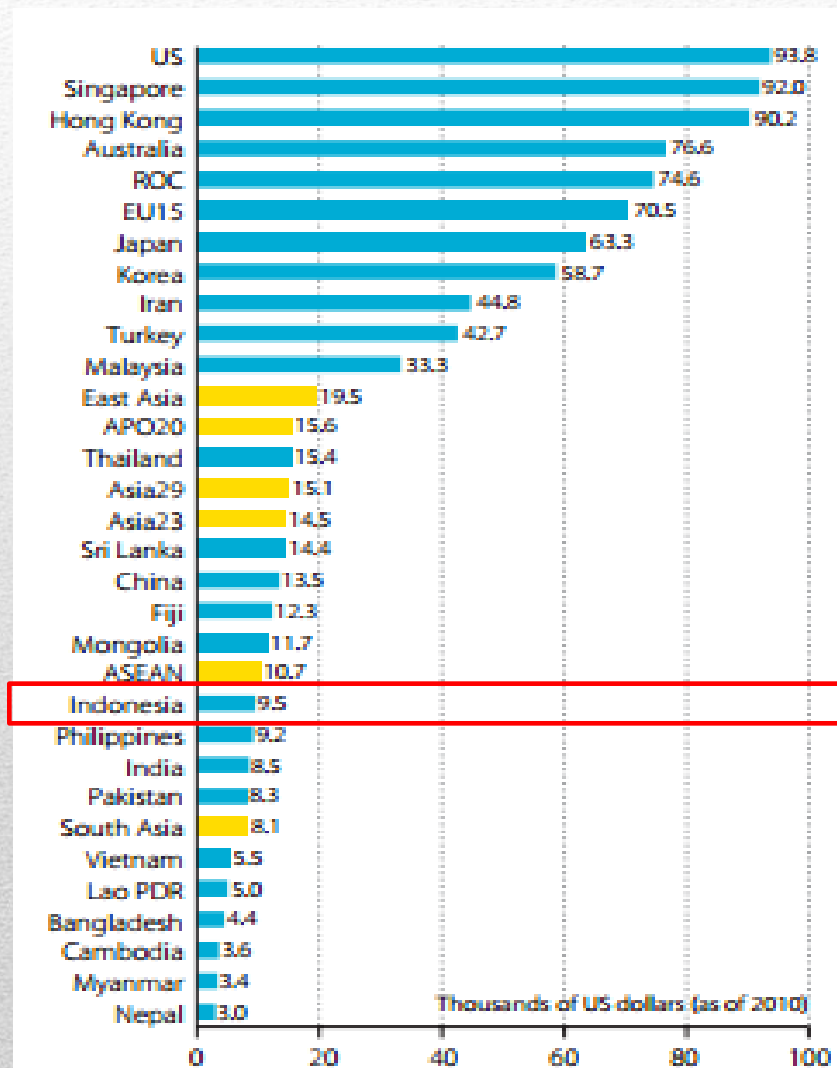
SITC Rev. 3	INDONESIA						Jumlah Produk Unggul Indonesia Terhadap Negara ASEAN
	IT & Consumer electronics	Electronic components	Transport equipment	Clothing	Miscellaneous manufacturing	Minerals	
Rank of Current Index (Indonesia)	29	47	41	22	26	7	
Brunei	Menang (86)	Menang (99)	-	Menang (103)	Menang (131)	Menang (32)	9
Malaysia	Kalah (1)	Kalah (43)	Kalah (32)	Menang (34)	Kalah (7)	Menang (9)	4
Thailand	Kalah (14)	Kalah (38)	Kalah (9)	Kalah (17)	Kalah (15)	Menang (78)	2
Phillipines	Kalah (26)	Kalah (23)	Menang (62)	Menang (47)	Menang (49)	Menang (96)	12
Singapore	Kalah (4)	Kalah (9)	Kalah (18)	Menang (26)	Kalah (3)	Menang (55)	5
Vietnam	Kalah (23)	Menang (67)	Menang (67)	Kalah (8)	Menang (34)	Menang (88)	9
Cambodia	-	-	Menang (69)	Menang (32)	Menang (85)	-	11
Myanmar	Menang (130)	Menang (132)	Menang (142)	Menang (51)	Menang (132)	Menang (125)	14
Laos	-	Menang (118)	Menang (121)	Menang (44)	Menang (108)	Menang (113)	12
Indonesia Unggul Atas Negara ASEAN	2	4	5	7	6	8	

Produk-produk Unggulan Indonesia terhadap ASEAN

Terhadap Negara	Produk-produk Indonesia yang Unggul (SITC rev. 3) berdasarkan TPI tahun 2010	Produk-produk Indonesia yang Unggul (SITC rev. 3) dalam hal Tren peningkatan TPI 2006 - 2010
Brunei	Fresh food, chemicals, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, clothing, miscellaneous manufacturing dan minerals.	Fresh food, chemicals, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, clothing dan minerals.
Malaysia	Fresh food, leather products, clothing dan minerals.	Fresh food, processed food, wood products, textiles, chemicals, basic manufactures, IT & consumer electronics, electronic components, transport equipment, clothing, miscellaneous manufacturing dan minerals.
Thailand	Wood products dan minerals.	Fresh food, processed food, wood products, textiles, chemicals, leather products, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, transport equipment, clothing dan miscellaneous manufacturing.
Phillipines	Fresh food, processed food, wood products, textiles, chemicals, leather products, basic manufactures, non-electronic machinery, transport equipment, miscellaneous manufacturing dan minerals.	Fresh food, wood products, textiles, chemicals, basic manufactures, non-electronic machinery, electronic components, miscellaneous manufacturing dan minerals.
Singapore	Wood products, textiles, leather products, clothing dan minerals.	Fresh food, processed food, wood products, textiles, chemicals, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, clothing dan miscellaneous manufacturing.
Vietnam	Processed food, wood products, textiles, chemicals, non-electronic machinery, electronic components, transport equipment, miscellaneous manufacturing dan minerals.	Fresh food, textiles, chemicals, leather products, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, transport equipment, clothing dan miscellaneous manufacturing.
Cambodia	Fresh food, processed food, wood products, textiles, chemicals, leather products, basic manufactures, non-electronic machinery, transport equipment, clothing dan miscellaneous manufacturing.	Textiles, chemicals, basic manufactures, transport equipment dan clothing.
Myanmar	Fresh food, processed food, wood products, textiles, chemicals, leather products, basic manufactures, non-electronic machinery, IT & consumer electronics, electronic components, transport equipment, clothing, miscellaneous manufacturing dan minerals.	Fresh food, textiles, leather products, basic manufactures, electronic components, transport equipment, clothing dan minerals.
Laos	Fresh food, processed food, wood products, chemicals, leather products, basic manufactures, non-electronic machinery, electronic components, transport equipment, clothing, miscellaneous manufacturing dan minerals.	Fresh food, leather products, basic manufactures, non-electronic machinery, clothing dan minerals.

4. Persaingan Produktivitas Tenaga Kerja

Labor Productivity Level per Worker 2011



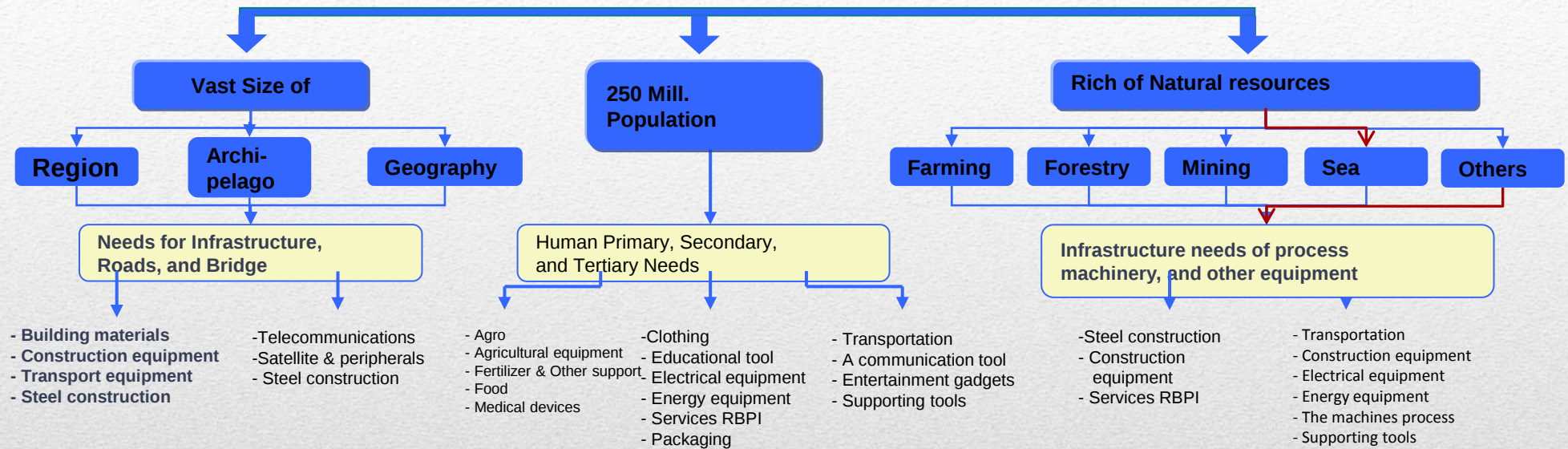
Average Labor Productivity Growth 2000-2010

	1. Agriculture	2. Mining	3. Manufacturing	4. Electricity, gas, and water supply	5. Construction	6. Wholesale and retail trade, hotels, and restaurants	7. Transport, storage, and communications	8. Finance, real estate, and business activities	9. Community, social, and personal services
Bahrain	-7.0	3.3	2.2	21.5	-8.7	-2.6	-5.0	6.6	0.3
Bangladesh	0.8	7.4	1.3	7.8	-1.2	3.3	2.1	-6.0	5.0
Brunei	-0.5	-3.7	-4.1	0.1	2.0	2.0	1.4	1.3	0.7
Cambodia	3.8	12.1	2.5	-4.7	-6.1	-0.5	0.9	0.2	0.8
China	6.7	9.0	8.0	8.1	7.6	8.3	7.1	8.9	8.0
ROC	3.0	5.9	6.1	3.1	0.0	2.1	2.8	-0.2	0.2
Fiji	0.3	6.4	1.7	2.0	-9.5	-0.3	2.5	-3.8	1.6
Hong Kong	-1.8	0.0	5.3	3.0	-1.1	5.0	2.3	1.0	0.1
India	2.5	1.5	3.4	3.1	6.4	6.1	9.5	6.8	3.6
Indonesia	3.1	-3.0	2.5	4.0	1.9	3.7	9.9	-0.4	0.0
Iran	1.8	1.2	6.0	6.0	-1.1	0.9	3.9	1.0	4.3
Japan	0.9	-1.1	3.7	1.0	-0.5	-0.6	0.8	0.7	0.3
Korea	4.9	-3.3	6.8	3.4	1.0	2.9	0.7	-0.6	-0.5
Kuwait	0.4	1.7	-0.4	7.4	-0.8	-2.8	6.6	-4.8	-1.3
Lao PDR	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Malaysia	2.7	-7.2	4.2	-4.4	-0.9	1.8	0.6	-0.8	3.2
Mongolia	1.9	-0.8	6.0	7.2	-2.2	2.7	3.7	5.2	-0.6
Myanmar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Nepal	0.0	-6.4	0.0	0.4	1.5	-0.9	2.5	-1.0	10.3
Oman	1.6	-1.8	4.8	2.2	0.4	3.4	4.0	2.0	2.1
Pakistan	0.1	-1.0	2.3	-4.1	-0.7	-0.8	-0.2	-3.5	5.3
Philippines	1.2	4.5	2.8	1.0	1.6	-0.7	3.8	-2.7	3.4
Qatar	-2.3	-9.4	0.4	6.2	0.1	4.3	3.2	2.3	1.4
Saudi Arabia	1.2	1.3	5.2	9.4	-1.0	5.5	7.3	-0.5	0.2
Singapore	-6.9	0.0	3.9	1.2	0.1	2.4	0.5	-0.4	-0.1
Sri Lanka	2.8	11.2	2.4	13.6	4.7	1.7	4.5	-0.8	3.3
Thailand	1.5	5.9	4.0	6.1	-0.7	0.0	4.3	1.6	-0.2
UAE	-0.1	-5.7	1.2	2.4	7.6	-1.6	-0.9	-8.4	-1.8
Vietnam	3.7	1.1	3.7	1.4	-1.5	3.0	5.3	-8.3	-1.4

D. Peluang dan Ancaman

1. Kondisi Industri

National Potential



	Natural Gas	Thermal Coal	Geothermal	Palm Oil	Cocoa	Tin	Nickel	Bauxite
Key Metrics	About 165 TCF of reserves at production rate $\pm$ 3 TCF pa	World second largest exporter	Home of 40% of world's resources (the largest in the world)	World's largest exporter; >19 mil tons per year	At 770 thou tons/year, world's 2 nd largest producer	At 65 thou tons/year, world's 2 nd largest producer	Own $\pm$ 12% of world's reserves (4 th largest)	World's 7 th largest reserves; world's 4 th largest production

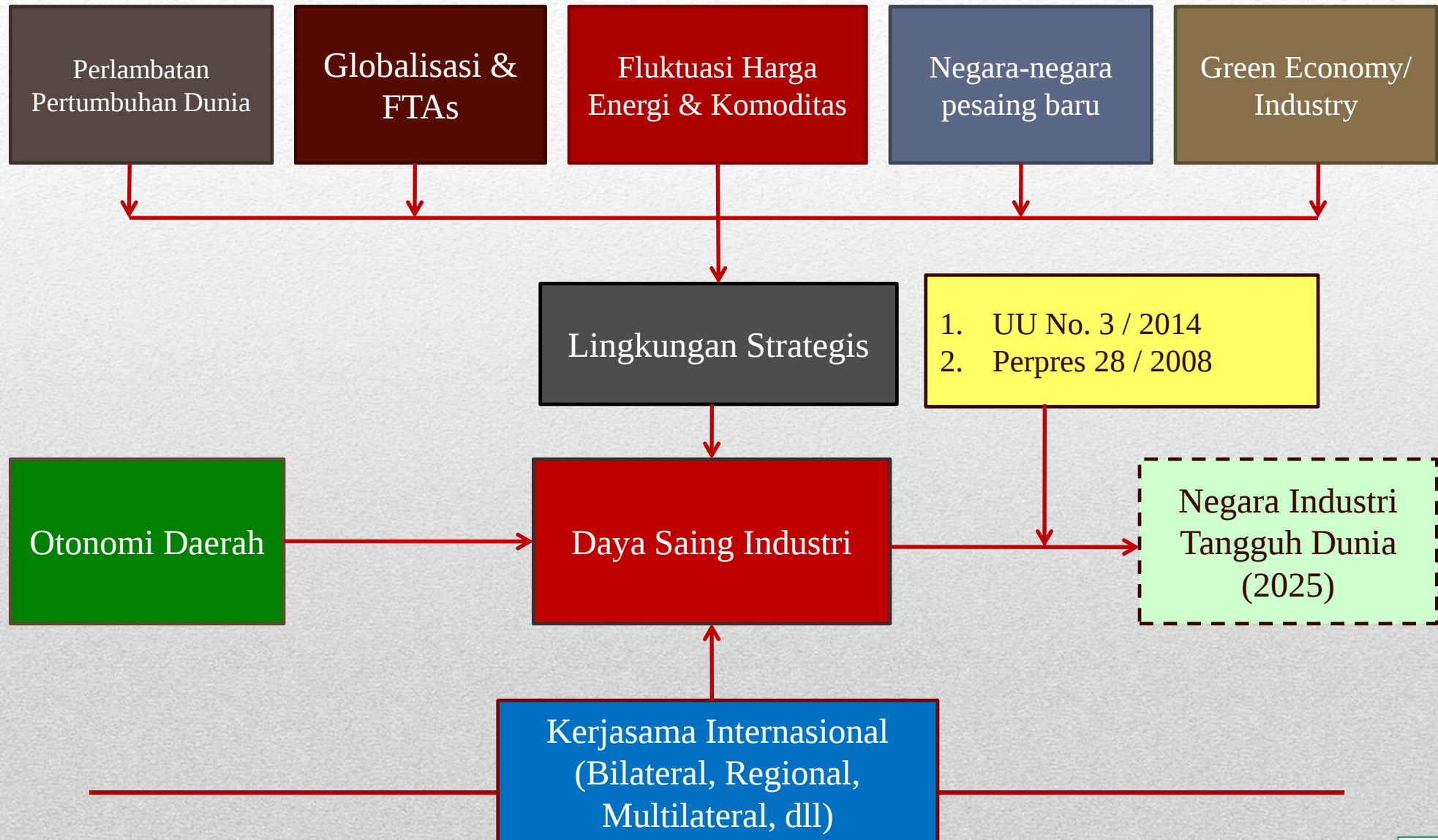
2. Potensi Sumber Daya Ekonomi Pendukung Industri

- ❖ Sumber daya alam Indonesia (cadangan hutan, kelautan dan perikanan, migas, mineral dan batubara, dsb) sangat potensial untuk menumbuh-kembangkan industri berbasis sumber daya alam.
- ❖ Letak Indonesia yang sangat strategis dapat mengakomodasi kepentingan berbagai negara serta kerja sama yang saling menguntungkan dengan negara-negara di sekelilingnya.
- ❖ Indonesia yang terdiri atas ribuan pulau dan penduduknya yang besar merupakan “*captive market*” bagi berbagai industri.
- ❖ Penduduk Indonesia yang besar tersebut tidak saja dapat merupakan modal bagi tumbuhnya industri (khususnya IKM) yang berbasis tenaga kerja, tetapi juga peluang bagi tumbuhnya sektor industri yang berbasis padat iptek dan daya kreatif.

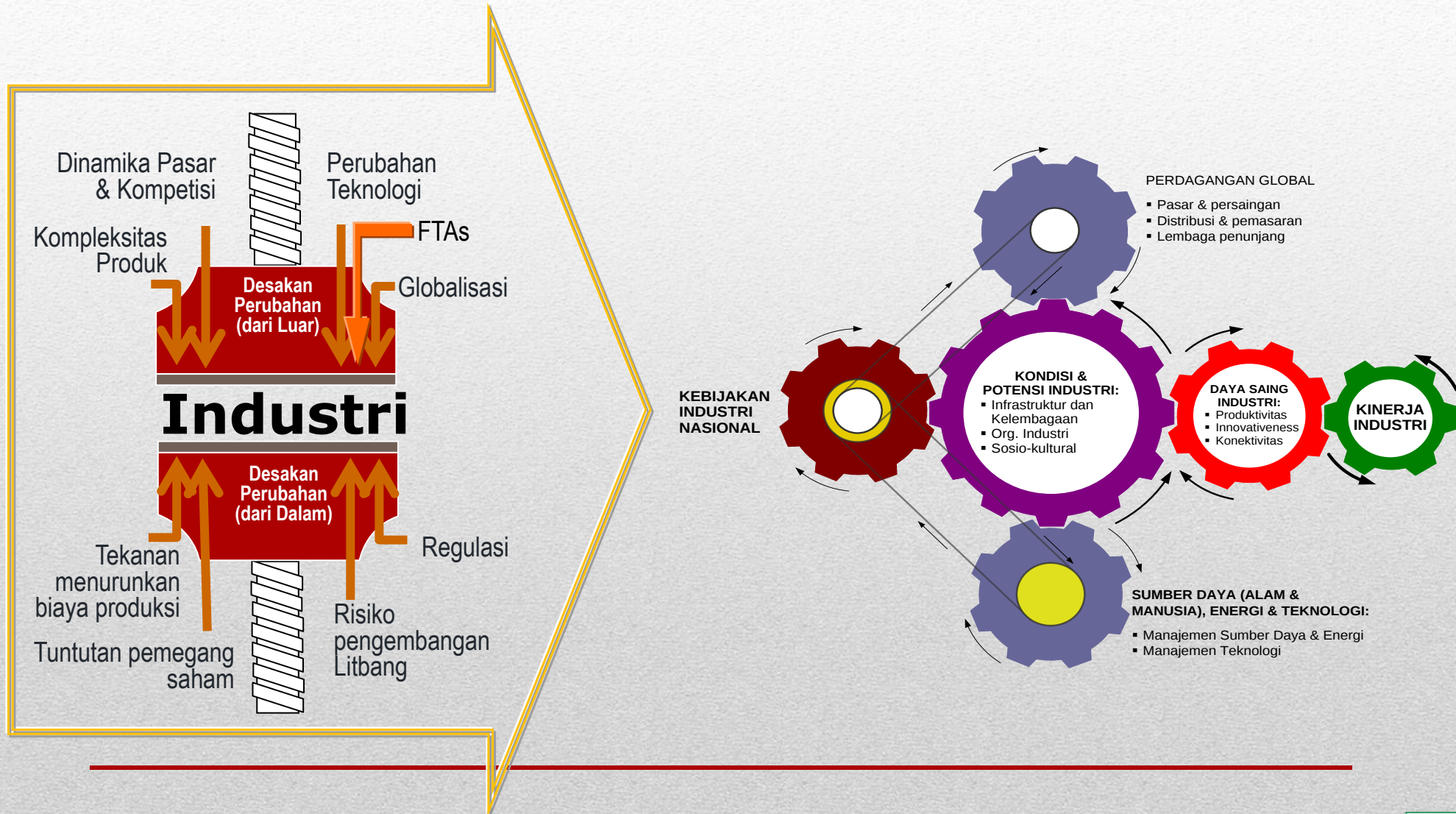
3. Masalah Yang Dihadapi Dalam Pengembangan Industri

1. Lingkungan strategis 10 tahun terakhir berubah sangat cepat dan dinamis, sementara itu kinerja industri 5 (lima) tahun terakhir terus menurun;
 2. Globalisasi di bidang ekonomi telah berlangsung sehingga tidak banyak lagi pilihan kebijakan perlindungan industri yang dapat digunakan;
 3. Era otonomi daerah telah menyebabkan perubahan paradigma pengembangan industri yang sebelumnya bersifat sentralisasi menjadi desentralisasi, dimana justru diperlukan koordinasi yang lebih intensif antara Pemerintah Pusat dan Pemerintah Daerah (Provinsi maupun Kabupaten/Kota)
 4. Banyaknya peraturan perundang-undangan baru yang mengikat industri yang perlu diakomodasikan oleh industri;
 5. Tantangan peningkatan kinerja industri semakin berat dan kompleks (antara lain seperti tertuang pada rekomendasi hasil *National Summit*)
-

4. Paradigma Baru Pengembangan Industri



5. Tantangan Yang Dihadapi Dalam Rangka Peningkatan Daya Saing Industri di Tingkat Mikro ke Tingkat Makro



6. Masalah yang Dihadapi di Tingkat Makro

Makro

- Lemahnya prasarana dan sarana;
- Ekonomi biaya tinggi;
- Kesenjangan pembangunan daerah;
- Ketertinggalan penguasaan teknologi;
- Daya saing menurun;
- Pertumbuhan yang lambat;
- Ekspor tertekan;
- Banyaknya kesepakatan internasional dalam bentuk FTA;
- Masih adanya hambatan tarif dan non tarif di negara tujuan ekspor.

7. Masalah yang Dihadapi di Tingkat Meso

Meso

- Belum kuatnya peran IKM;
- Penurunan kinerja di beberapa cabang Industri terutama cabang industri kayu dan produk kayu, serta TPT;
- Keterbatasan jumlah industri berteknologi tinggi;
- Kurangnya dukungan permodalan;
- Tingginya suku bunga bank;
- Dukungan infrastruktur yang tidak menunjang.

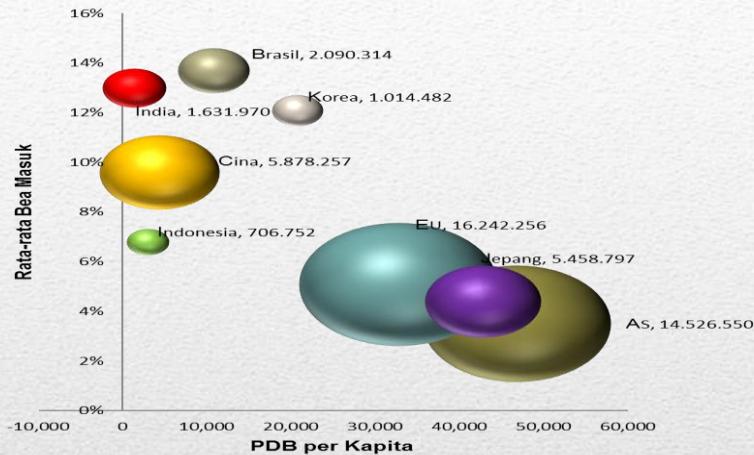
8. Masalah yang Dihadapi di Tingkat Industri

Industri

- Rendahnya apresiasi terhadap Produk Dalam Negeri
- Terbatasnya pasokan bahan baku dan energi;
- Kurangnya bahan baku karena diekspor dalam bentuk produk primer;
- Masih Tingginya impor bahan baku dan penolong;
- Terbatasnya produksi barang setengah jadi dan komponen;
- Terbatasnya penerapan standarisasi;
- Belum optimalnya kapasitas produksi;
- Ketergantungan ekspor hanya pada beberapa komoditi & beberapa negara tujuan;
- Penyelundupan;
- Terbatasnya jumlah merek lokal.

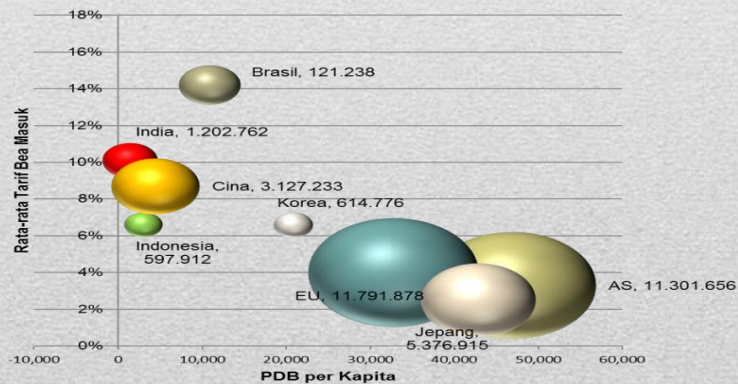
9. Tantangan Yang Dihadapi Dari Sisi Perdagangan Internasional

Posisi Bea Masuk Indonesia (MFN) dibanding 7 Negara Anggota G-20 (2010) Sudah Sangat Rendah

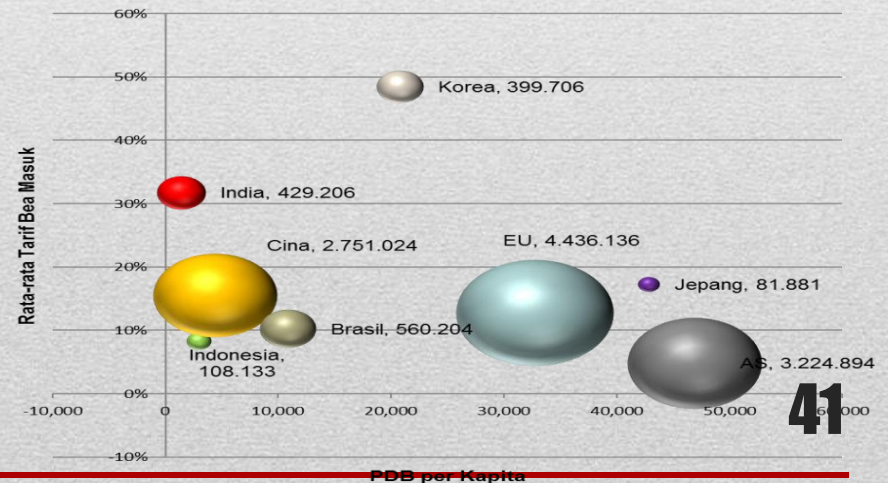


NB: Besaran diameter bola mengindikasikan besaran PDB suatu negara

① MFN untuk Produk Non-Agriculture (2010)



② MFN untuk Produk Pertanian (2010)



Tarif dari Beberapa Produk Penting di Beberapa Negara

Description	Average (%)								
	Indonesia	Japan	Korea	China	Malaysia	Vietnam	India	Brazil	Russia
all products	4.52	2.40	6.55	12.60	6.02	6.96	12.73	11.14	10.91
agricultural products	18.03	23.55	40.00	21.94	23.27	19.85	41.56	10.35	20.38
industrial products	3.72	1.06	4.44	11.94	5.02	6.20	10.69	11.20	10.26
Live animals; animal products	5.06	25.83	23.75	17.11	0.59	13.13	31.12	10.57	20.75
Vegetable products	6.17	30.21	79.50	22.37	6.71	16.77	34.70	6.69	5.84
Animal or vegetable fats and oils and their cleavage products, prepared edible fats; animal or vegetable waxes	2.54	4.22	8.34	18.98	2.83	13.10	18.84	9.36	11.81
Prepared foodstuffs; beverages, spirits and vinegar; tobacco and manufactured tobacco substitutes	37.82	13.77	16.82	23.56	49.55	30.45	56.88	14.77	31.65
Mineral products	0.78	0.28	2.97	1.87	2.16	6.38	1.78	0.36	5.93
Products of the chemical or allied industries	5.45	0.57	5.83	9.11	2.50	3.81	8.02	7.58	8.94
Plastics and articles thereof; rubber and articles thereof	8.68	1.16	6.52	12.15	14.15	7.48	8.82	12.15	13.10
Raw hides and skins, leather, furskins and articles thereof; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silkworm gut)	4.80	9.10	6.86	17.24	2.27	15.29	8.26	18.81	24.51
Wood and articles of wood; wood charcoal; cork and articles of cork; manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	2.27	1.66	5.21	6.27	8.55	3.43	8.52	8.66	19.64
Pulp of wood or of other fibrous cellulosic material; recovered (waste and scrap) paper or paperboard; paper and paperboard and articles thereof	3.74	0.03	0.05	7.77	7.95	13.33	8.58	10.19	13.00



Description	Average (%)								
	Indonesia	Japan	Korea	China	Malaysia	Vietnam	India	Brazil	Russia
Textiles and textile articles	8.91	5.61	10.36	21.84	11.18	12.89	18.11	26.26	20.11
Footwear, headgear, umbrellas, sun umbrellas, walking-sticks, seat-sticks, whips, riding-crops and parts thereof; prepared feathers and articles made therewith; artificial flowers; articles of human hair	16.09	58.32	10.80	23.54	13.80	32.15	9.66	30.49	17.41
Articles of stone, plaster, cement, asbestos, mica or similar materials; ceramic products; glass and glassware	8.68	0.48	7.34	16.72	17.66	21.27	9.19	11.10	17.16
Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	4.59	0.48	3.98	9.19	1.76	5.65	9.31	9.64	21.67
Base metals and articles of base metal	5.71	0.37	2.68	7.87	16.80	5.11	6.38	11.54	11.68
Machinery and mechanical appliances; electrical equipment; parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	2.65	0.02	3.47	13.90	2.08	3.19	4.95	10.79	5.81
Vehicles, aircraft, vessels and associated transport equipment	9.99	0.00	6.59	29.15	11.21	21.95	47.96	22.80	20.79
Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; clocks and watches; musical instruments; parts and accessories thereof	4.91	0.06	5.73	8.40	0.24	3.28	6.19	10.56	7.07
Arms and ammunition; parts and accessories thereof	5.18	2.57	1.47	18.77	11.83	3.06	9.26	19.45	25.02
Miscellaneous manufactured articles	9.52	0.31	3.62	13.02	7.84	21.60	9.27	17.49	22.09
Works of art, collectors' pieces and antiques	5.42	0.00	0.00	12.60	0.16	5.11	9.27	3.81	0.00

f. Indonesia Net Importer Perdagangan Jasa

(Juta USD)

Uraian	2005	2006	2007	2008	2009	2010	2011
Jasa-Jasa	-9.122	-9.874	-11.841	-12.998	-9.741	-9.324	-11.822
A. Jasa Transportasi	-4.606	-6.079	-7.294	-11.094	-4.083	-6.007	-8.714
B. Jasa Perjalanan (Travel)	938	418	442	1.823	282	563	673
C. Jasa Komunikasi	504	531	702	320	578	579	617
D. Jasa Konstruksi	-241	-529	-282	-83	-213	-72	59
E. Jasa Asuransi	-324	-352	-645	-663	-1.298	1.131	-1.267
F. Jasa Keuangan	-172	-163	-84	-37	-227	-118	-227
G. Jasa Komputer dan Informasi	-414	-477	538	-536	-516	-471	-512
H. Royalti dan Imbalan Lisensi	-698	-859	-1.055	-1.300	-1.492	-1.557	-1.710
I. Jasa Bisnis Lainnya	-4.141	-2.522	-3.195	-1.645	-2.998	-1.147	-747
J. Jasa Personal, Kultural & Rekreasi	-109	-50	52	-49	-51	-29	-56
K. Jasa Pemerintah	143	208	160	264	277	65	56

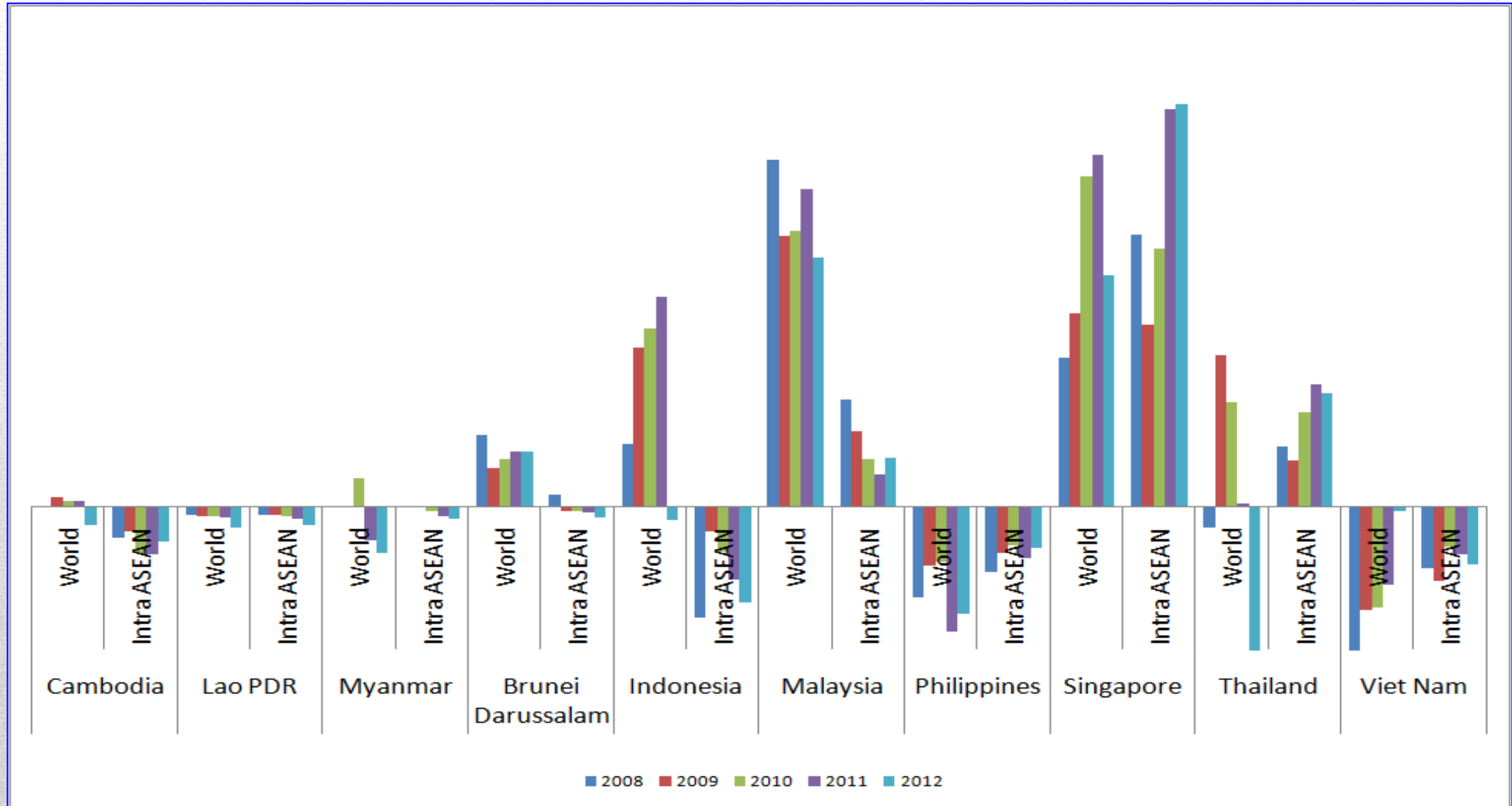
Sumber: Direktorat Statistik dan Ekonomi Moneter Bank Indonesia

Perdagangan Intra ASEAN

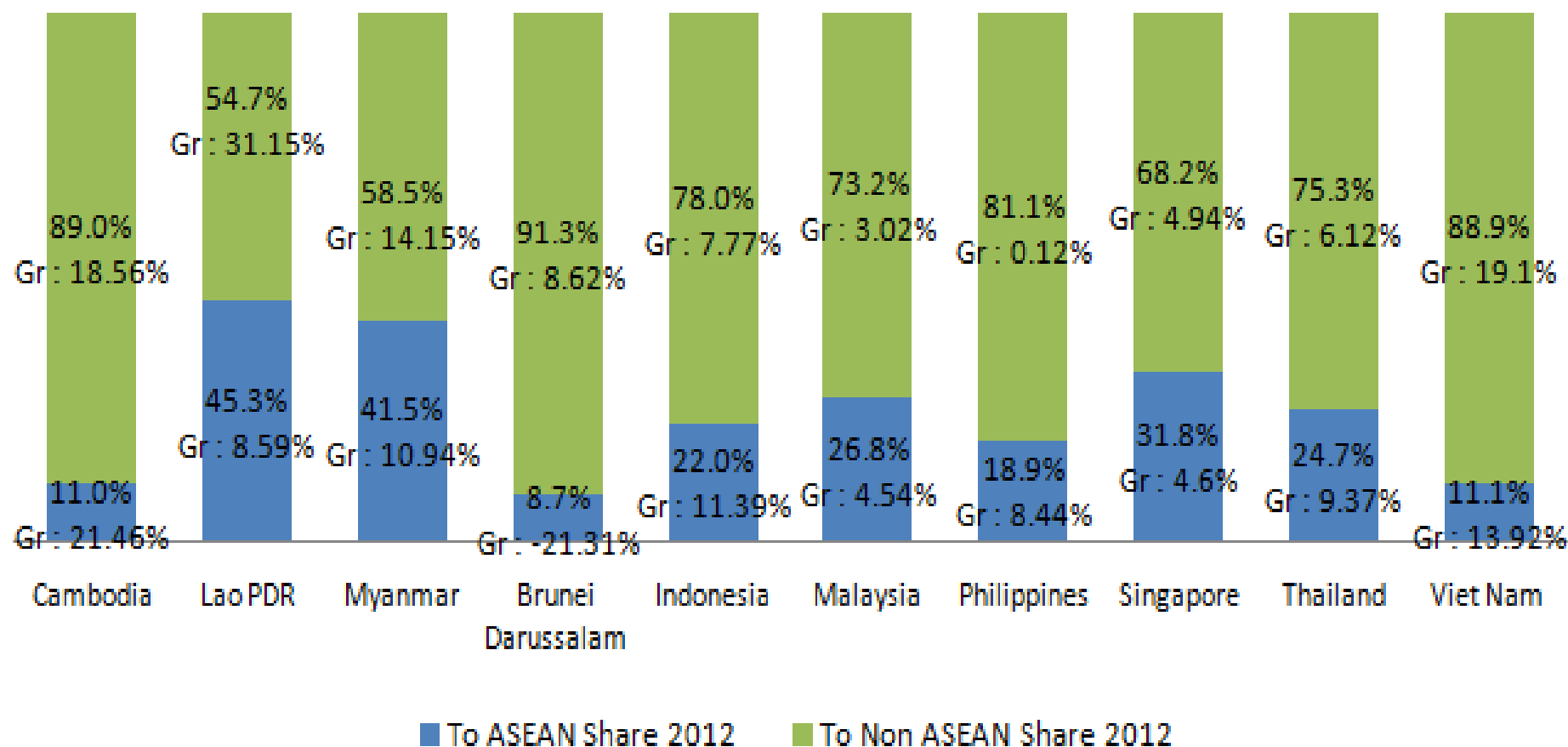
Country		2008	2009	2010	2011	2012	Growth
Cambodia	Export	439	716	691	887	955	21.46%
	Import	4,413	3,828	6,534	6,859	5,328	4.82%
	Trade (E-I)	(3,975)	(3,111)	(5,844)	(5,972)	(4,373)	
Lao People's Democratic Republic	Export	897	713	1,048	1,593	1,247	8.59%
	Import	1,955	1,865	2,381	3,135	3,677	17.11%
	Trade (E-I)	(1,058)	(1,152)	(1,332)	(1,542)	(2,430)	
Myanmar	Export	-	-	3,274	3,765	4,030	10.94%
	Import	-	-	3,947	5,074	5,592	19.03%
	Trade (E-I)	-	-	(673)	(1,309)	(1,562)	
Brunei Darussalam	Export	2,879	933	957	1,596	1,104	-21.31%
	Import	1,517	1,516	1,605	2,359	2,514	13.47%
	Trade (E-I)	1,362	(583)	(648)	(763)	(1,410)	
Indonesia	Export	27,171	24,624	33,348	42,099	41,831	11.39%
	Import	40,995	27,742	39,038	51,300	53,822	7.04%
	Trade (E-I)	(13,824)	(3,119)	(5,690)	(9,201)	(11,991)	
Malaysia	Export	51,005	40,440	50,498	56,061	60,927	4.54%
	Import	37,682	31,082	44,700	52,059	54,976	9.90%
	Trade (E-I)	13,322	9,357	5,798	4,002	5,951	
Philippines	Export	7,090	5,844	11,545	8,635	9,804	8.44%
	Import	15,290	11,672	16,434	15,040	14,954	-0.55%
	Trade (E-I)	(8,200)	(5,828)	(4,889)	(6,405)	(5,150)	
Singapore	Export	108,458	81,646	106,634	127,515	129,831	4.60%
	Import	74,759	59,048	74,650	78,110	79,800	1.64%
	Trade (E-I)	33,699	22,599	31,984	49,405	50,031	
Thailand	Export	39,656	32,491	44,334	54,305	56,732	9.37%
	Import	32,196	26,760	32,608	39,224	42,623	7.27%
	Trade (E-I)	7,460	5,731	11,726	15,081	14,110	
Viet Nam	Export	8,110	10,338	8,761	10,365	13,656	13.91%
	Import	15,908	19,568	13,811	16,408	20,910	7.07%
	Trade (E-I)	(7,798)	(9,230)	(5,050)	(6,043)	(7,254)	

Sources : Trademap

Perbandingan Trade Intra-ASEAN dan Dunia (2008-12)



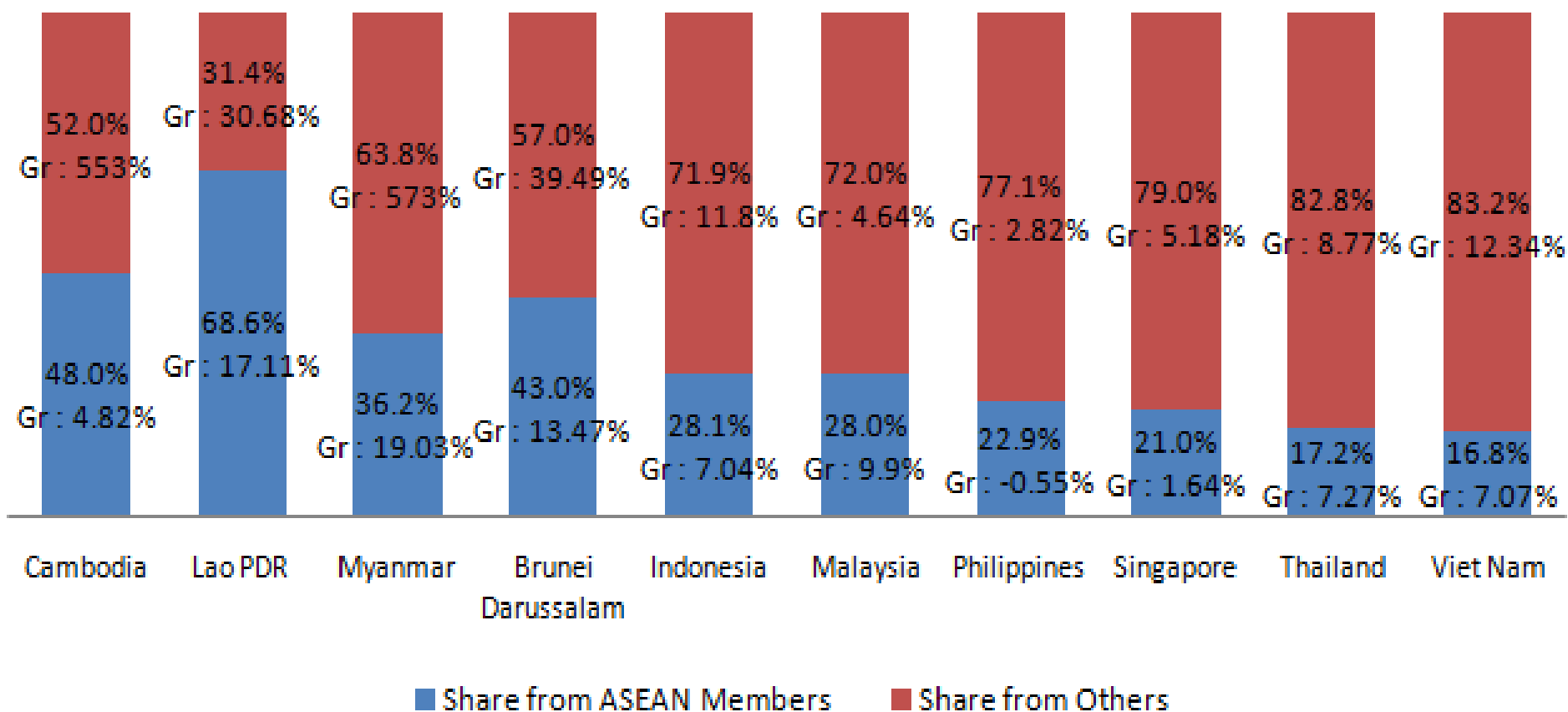
Peran Export intra ASEAN terhadap Total Export 2012



Gr = Average Growth 2008 – 2012, Except Myanmar 2010-2012

Source : Trademap, Processed

Peran Impor intra ASEAN terhadap Total Impor 2012



Gr = Average Growth 2008 – 2012, Except Myanmar 2010-2012

Source : Trademap, Processed

Sepuluh Besar Barang yang diperdagangkan ASEAN

No.	Top 10 Export Countries Destination	Top 10 Suppliers (Importers)	Top 10 products Exported by ASEAN		Top 10 Products import ed by ASEAN	
			Chapter	Product Label	Chapter	Product Label
1.	China	China	85	Electrical, electronic equipment	27	Mineral fuels, oils, distillation products, etc
2.	Japan	Singapore	27	Mineral fuels, oils, distillation products, etc	85	Electrical, electronic equipment
3.	United States of America	Japan	84	Machinery, nuclear reactors, boilers, etc	84	Machinery, nuclear reactors, boilers, etc
4.	Singapore	Korea, Republic of	15	Animal,vegetable fats and oils, cleavage products, etc	87	Vehicles other than railway, tramway
5.	Hong Kong, China	United States of America	40	Rubber and articles thereof	72	Iron and steel
6.	Malaysia	Malaysia	87	Vehicles other than railway, tramway	39	Plastics and articles thereof
7.	Indonesia	Thailand	39	Plastics and articles thereof	71	Pearls, precious stones, metals, coins, etc
8.	Korea, Republic of	Chinese Taipei	29	Organic chemicals	90	Optical, photo, technical, medical, etc apparatus
9.	Australia	Indonesia	99	Commodities not elsewhere specified	29	Organic chemicals
10.	India	India	90	Optical, photo, technical, medical, etc apparatus	73	Articles of iron or steel

Source : Trademap

TERIMA KASIH
