

Indonesia Steel Industry Research Report 2023-2032

<https://marketpublishers.com/r/I68AFA0E5249EN.html>

Date: December 2023

Pages: 60

Price: US\$ 3,600.00 (Single User License)

ID: I68AFA0E5249EN

Abstracts

Indonesia stands as the foremost economy in Southeast Asia and holds the position of the largest steel producer in the region. As of 2022, Indonesia ranks 16th globally in terms of steel production.

In 2021, Indonesia's steel industry showcased remarkable resilience and growth, defying the challenges posed by the ongoing global impact of the Covid-19 pandemic. In the third quarter of the year, the sector expanded by an impressive 9.82%, as reported by the Indonesian government's statistics office (BPS), attributing this positive trajectory to the export of steel products.

During November 2021, the export value of steel products reached an impressive \$19.6 billion, generating a significant profit of \$6.1 billion. According to CRI, the pivotal role of government regulations in steering the development of Indonesia's steel sector was emphasized by Budi Susanto, Metal sector Director of the General Directorate of Metals, Machinery, Transport Equipment, and Electronics Industry (ILMATE), representing the Ministry of Industry (Kemenperina). Susanto highlighted the effectiveness of the government's control efforts, introducing the concept of 'smart supply and demand' and orchestrating a strategic shift from the upstream to downstream in the iron and steel industry. The surge was further fueled by the growing demand for steel, bolstered by the automotive industry's PPnBM policy, which escalated to 27% in the third quarter of 2021.

According to the Indonesian Iron & Steel Industry Association (IISIA), the steel sector witnessed substantial investments of nearly USD 12 billion in 2021, with projections indicating a further increase to USD 15.2 billion or IDR 215 trillion in 2022. According to CRI this growth is intricately tied to the rising domestic steel demand and a surge in exports, particularly in the downstream steel sector.

However, challenges persist in the upstream business, notably in carbon steel, which is yet to meet Indonesia's domestic demand. Steel imports, as reported by the Government Bureau of Statistics Indonesia (BPS), experienced a 23% increase from 3.9 million tons in 2020 to 4.8 million tons in 2021. While some argue that using 2020 statistics may be futile given the severe impact of the Covid-19 outbreak, a comparison with 2019 statistics reveals a noteworthy 31% decrease in steel imports.

The rise in steel imports is further attributed to unfair trade practices such as dumping and tariff manipulations, with Cold Rolled Coil (CRC) products experiencing a substantial 70% increase in 2021. Meanwhile, other items, including Hot Rolled Coil (HRC), witnessed a 16% increase, and Coated Sheet steel products saw an 18% rise.

Despite various government initiatives to limit imports, including import substitution programs, the P3DN program promoting domestic product use, mandatory SNI for quality assurance, and incentives for increasing investments in the metals sector, Indonesia continues to import carbon steel from international steel-exporting countries. According to CRI, steel imports are anticipated to become Indonesia's second-largest non-oil and gas import commodity.

Looking ahead, steel manufacturers in Indonesia anticipate the need for tightened import licenses, particularly for steel goods that can be produced domestically. Concurrently, according to BPS-Statistics Indonesia, steel products emerged as the third-largest export commodity in Indonesia from 2020 to 2022, surpassing various other significant export products and showcasing the industry's growing prominence in contributing to Indonesia's economic growth. According to CRI, this data underscores the steel sector's resilience and increasing significance on the global stage, emphasizing its pivotal role in Indonesia's economic development.

Topics covered:

Indonesia Steel Industry Overview

The economic and policy environment of Indonesia's steel industry

What is the impact of COVID-19 on the Indonesia's steel industry?

Indonesia Steel Industry Market Size, 2023-2032

Analysis of the main Indonesia's steel production enterprises

Key drivers and market opportunities for Indonesia's steel industry

What are the key drivers, challenges and opportunities for Indonesia's steel industry during the forecast period 2023-2032?

Which companies are the key players in the Indonesia steel industry market and what are their competitive advantages?

What is the expected revenue of Indonesia steel industry market during the forecast period 2023-2032?

What are the strategies adopted by the key players in the market to increase their market share in the industry?

Which segment of the Indonesia steel industry market is expected to dominate the market by 2032?

What are the main negative factors facing the steel industry in Indonesia?

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