

# **Membangun Industri Halal Berorientasi Ekspor**



**Adhi Lukman**

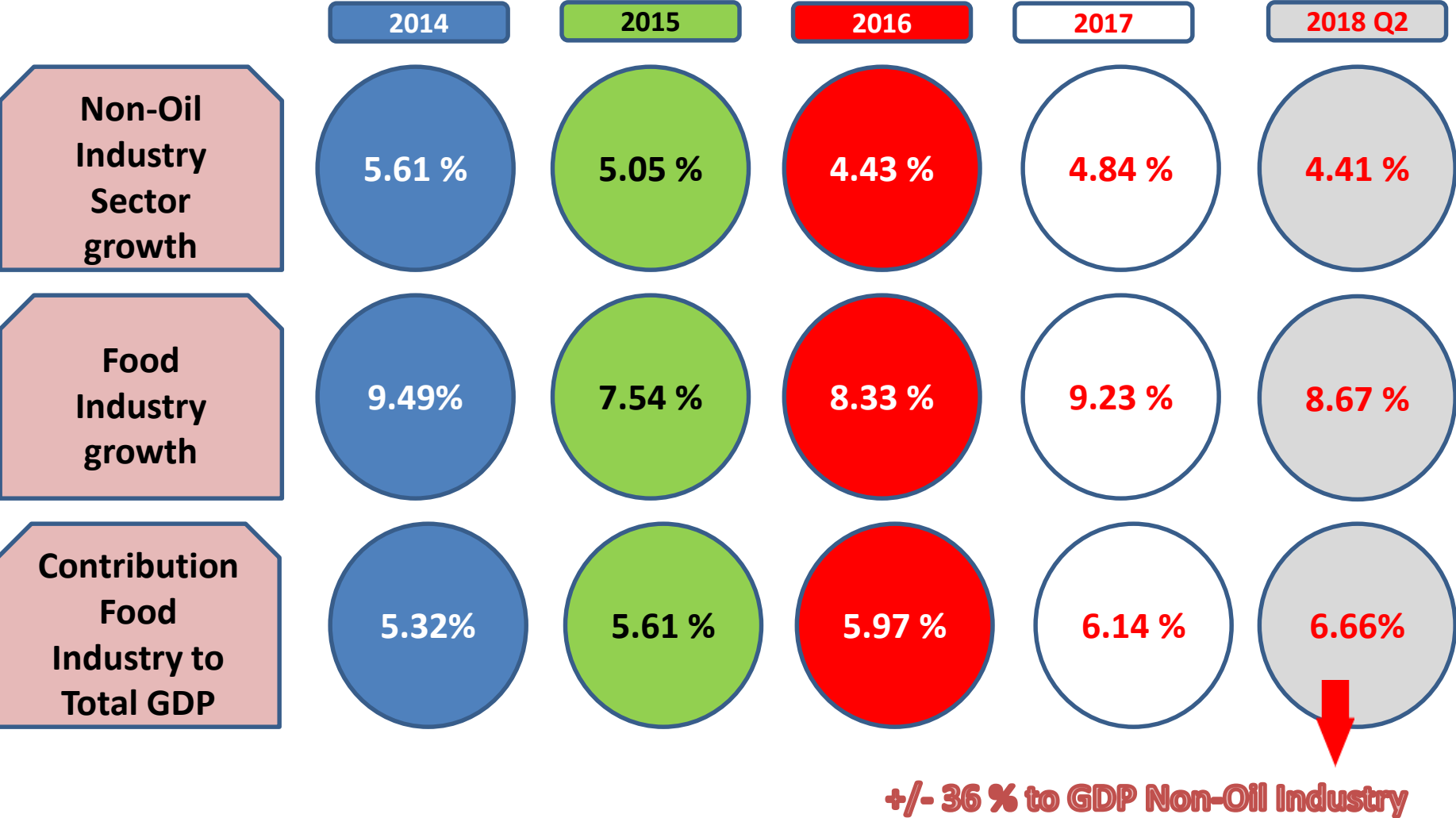
**Chairman of Indonesian Food and Beverage Industry Association**

**Jakarta , 18 Desember 2018**



# Market & Industry Overview

# All About Food Industry (Source: BPS – Mol)



# F&B Industry (Source: BPS)

## Number of Establishment

Source : BPS

Category	2014		2015		Growth	
	Medium - Large	Small & Micro	Medium - Large	Small & Micro	Medium - Large	Small & Micro
Food	5,794	1,198,491	5,438	1,567,019	(6.14)	30.75
Beverages	374	44,694	310	47,130	(17.11)	5.45
Total	6,168	1,243,185	5,748	1,614,149	(6.81)	29.84
%	0.49	99.51	0.35	99.65		

## Workers Engaged

Category	2014		2015		Growth	
	Medium - Large	Small & Micro	Medium - Large	Small & Micro	Medium - Large	Small & Micro
Food	877,771	2,324,212	719,116	3,664,208	(18.07)	57.65
Beverages	52681	81,027	46,379	85,167	(11.96)	5.11
Total	930,452	2,405,239	765,495	3,749,375	(17.73)	55.88
%	27.89	72.11	16.95	83.05		

# All About Food Industry: F&B Investment Realization

## Investment in F&B industry sector 2017:

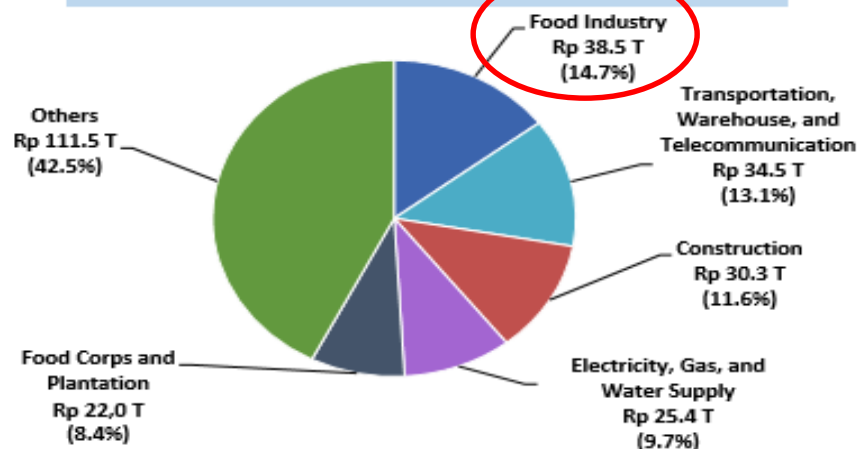
➤ DDI grow around 20%

➤ FDI grow **minus 7%**

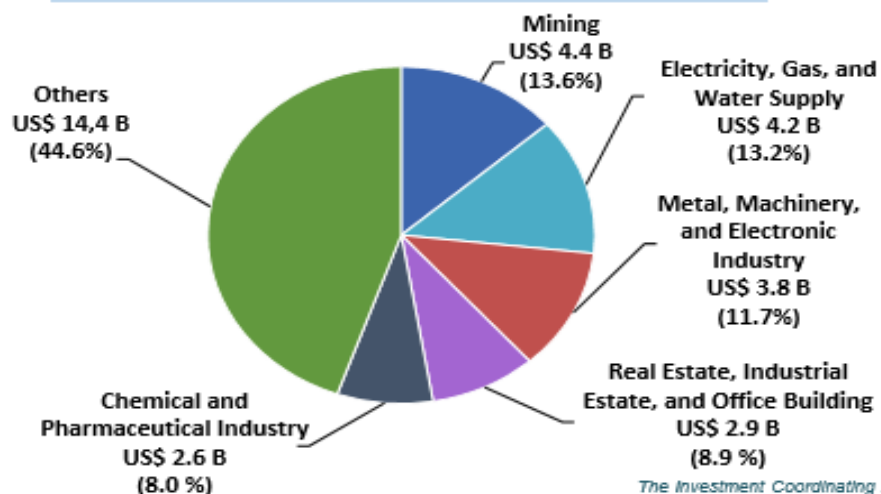
INVESTMENT	2014		2015		2016		2017	
	P	I	P	I	P	I	P	I
DDI	493	19,596.39	879	24,533.99	1,169	32,028.50	1,419	38,540.10
(Rp. Billions)								
FDI	1,054	3,139.60	886	1,521.18	1,947	2,115.00	1,649	1,970.30
(USD million)								
Total	1,547		1,765		3,116		3,068	

## Investment Realization in January – December 2017: Based on Sector

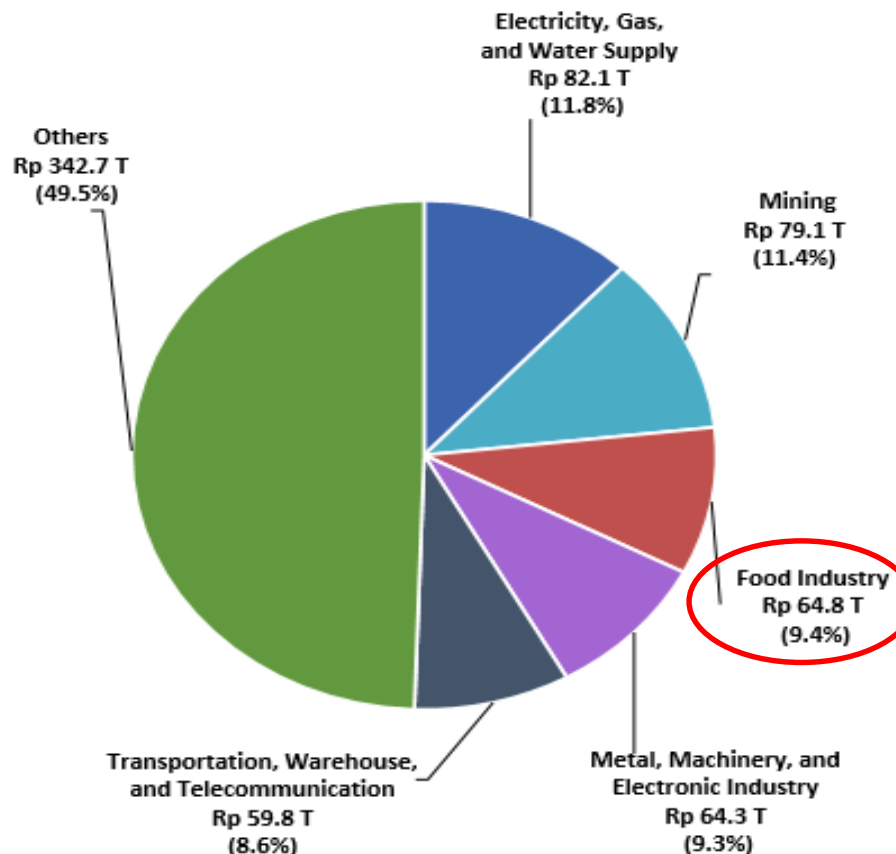
### DDI



### FDI



### DDI + FDI

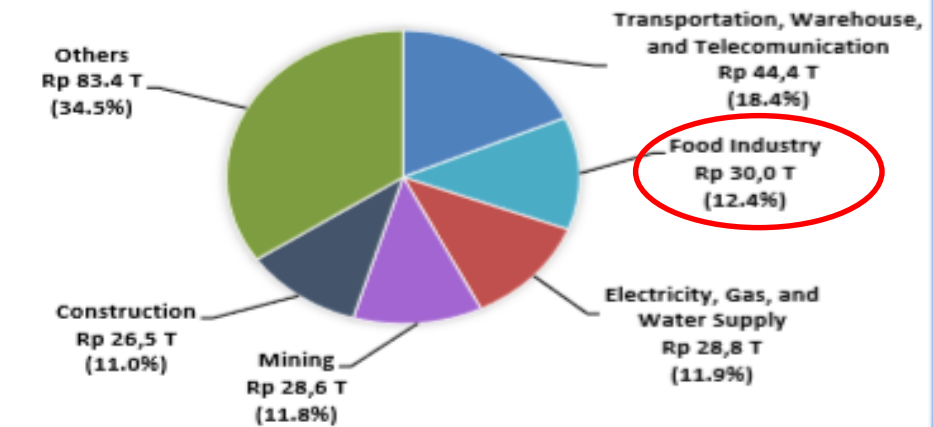


T= Trillion  
B= Billion

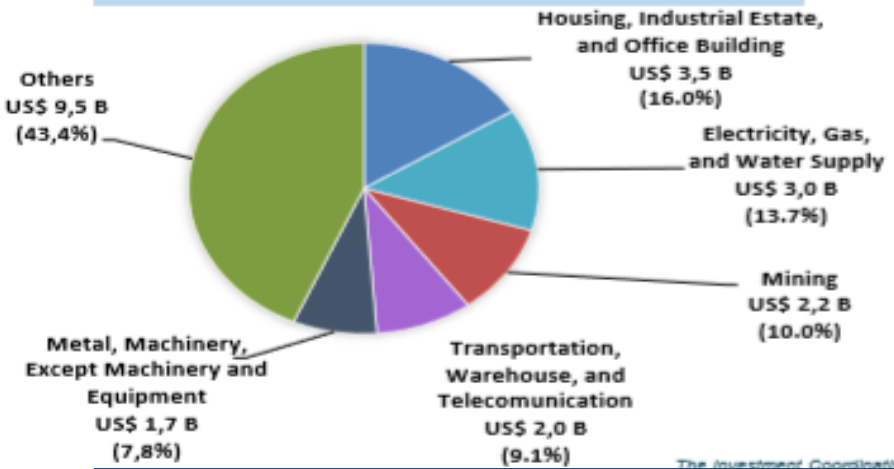


Investment Realization in January – September 2018: Based on Sector

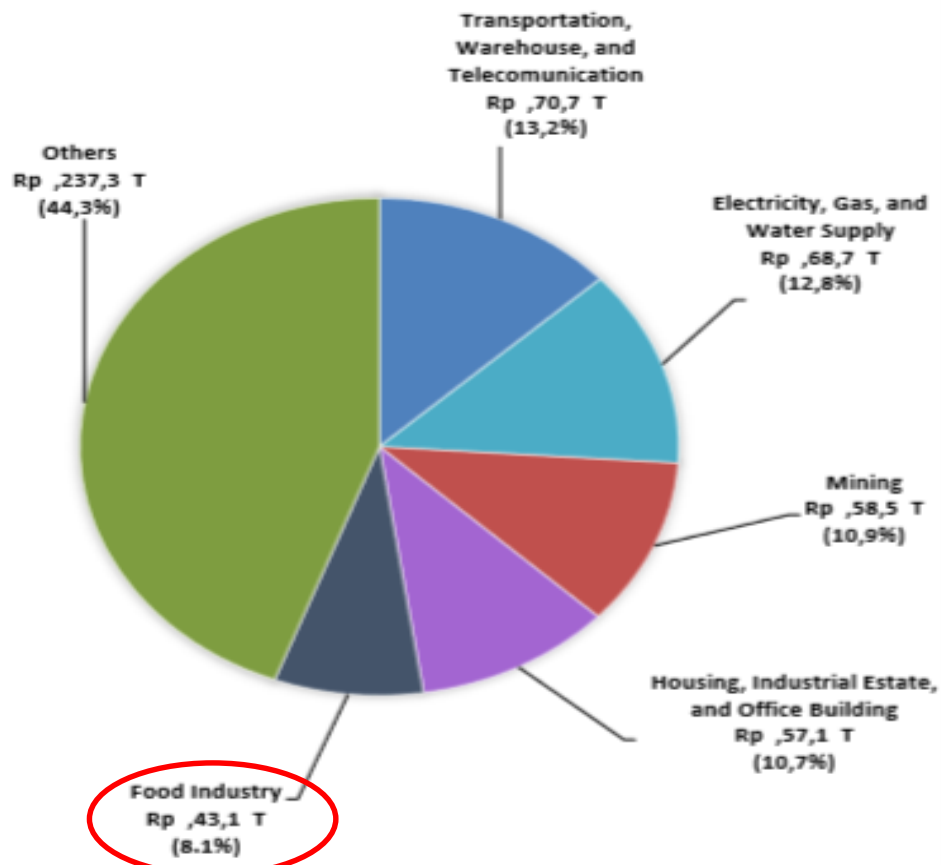
DDI



FDI



DDI + FDI



T= Trillion  
B= Billion

FDI Food Industry 972.39 Million USD

# INDONESIA in the World Rank



Ease Of  
Doing  
Business  
Index  
2018  
# 72 of 190  
(91 of 190)  
Countries  
#5 in  
ASEAN

The Global  
Competitive  
ness Index 2  
2018  
45 of 140  
(36 of 137)  
Countries  
#4 in ASEAN

Logistic  
Performance  
Index 2018  
46 Of 167  
(63 of 160)  
Countries  
#5 in ASEAN

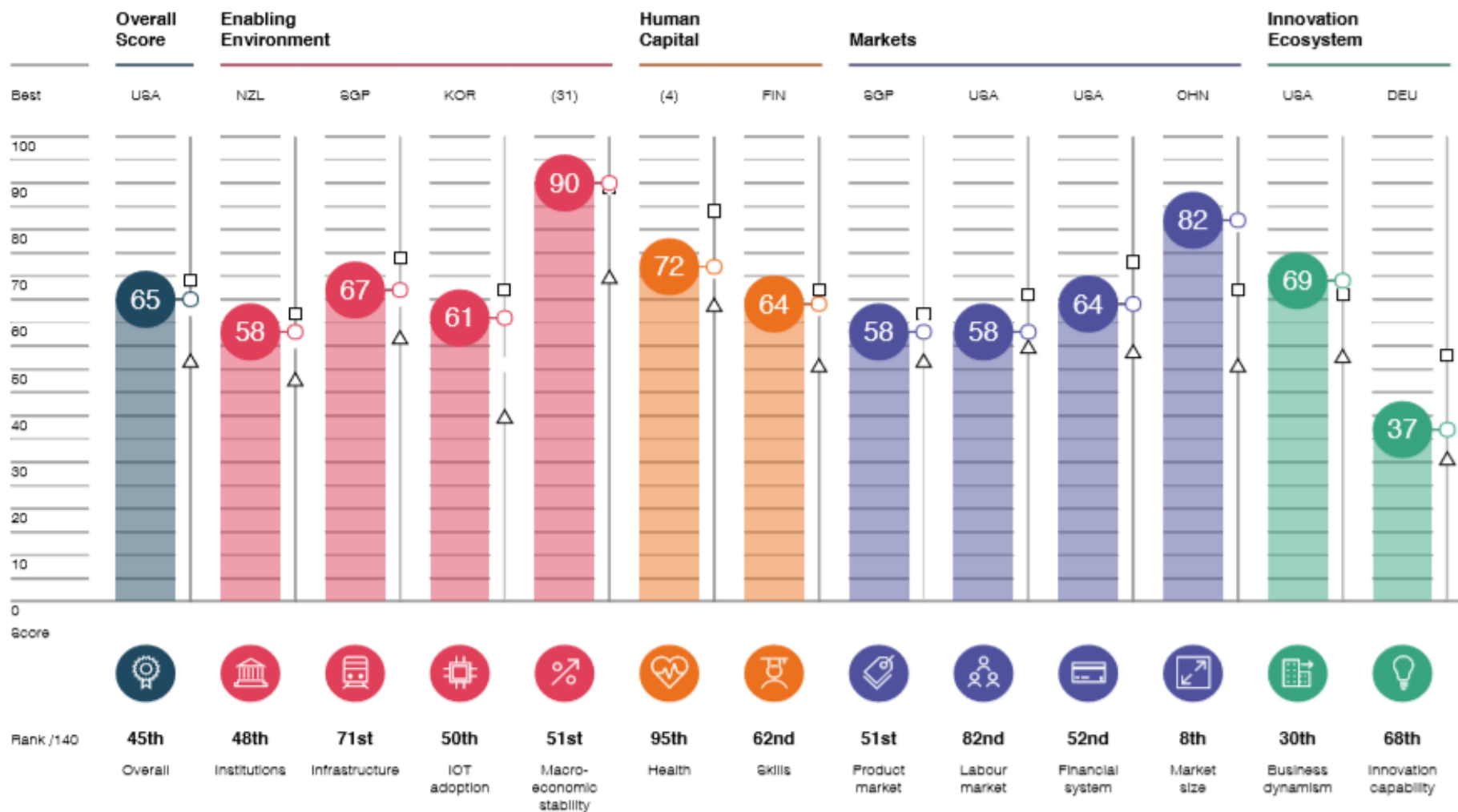
Labor  
Productivity  
per worker  
GDP 2012  
#4 in ASEAN

Global Food  
Security  
Index 2018  
65 of 113  
Countries  
(69 of 113)  
#5 in  
ASEAN

The Global  
Innovation  
Index 2018  
85of 126  
Countries  
(87 of 127)  
#7 in  
ASEAN

# Performance OverviewKey 2018

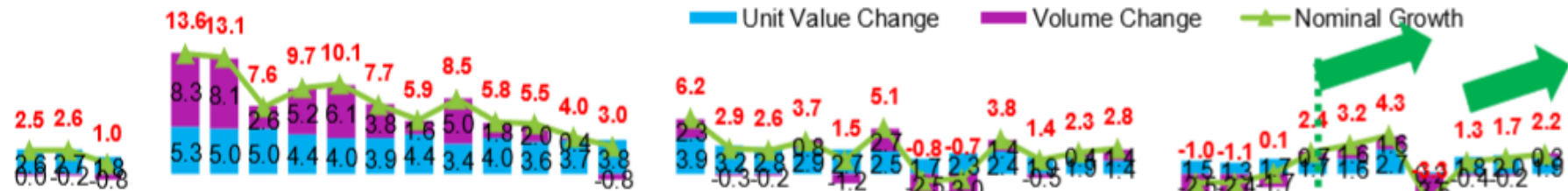
◇ Previous edition    △ Lower middle income group average    □ East Asia and Pacific average



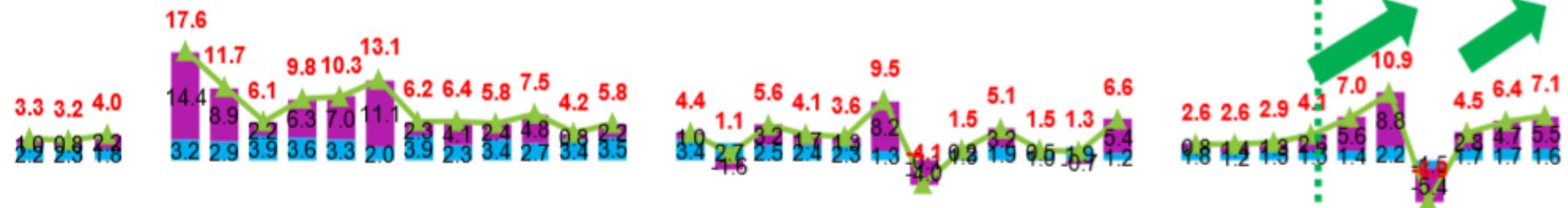
# Update :Modern channel (kelas menengah atas) **berbalik naik**, tetapi GT (kelas bawah) masih turun

Source: Nielsen

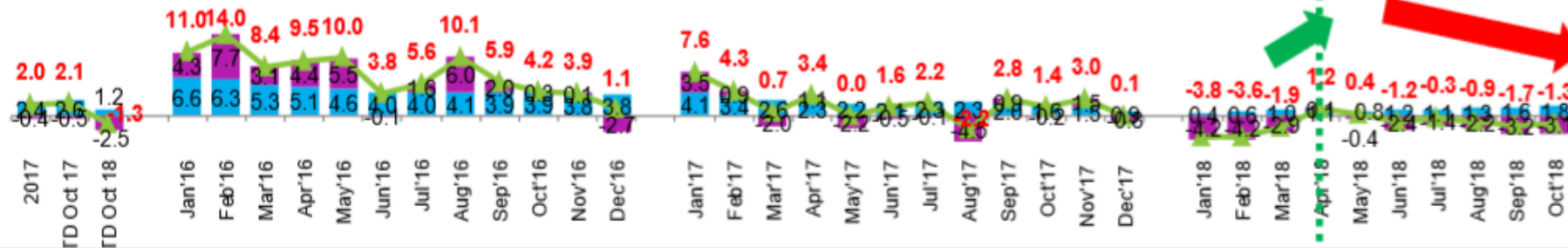
## Total Indonesia Market | 55 Categories



## Total Indonesia Modern Trade | 55 Categories



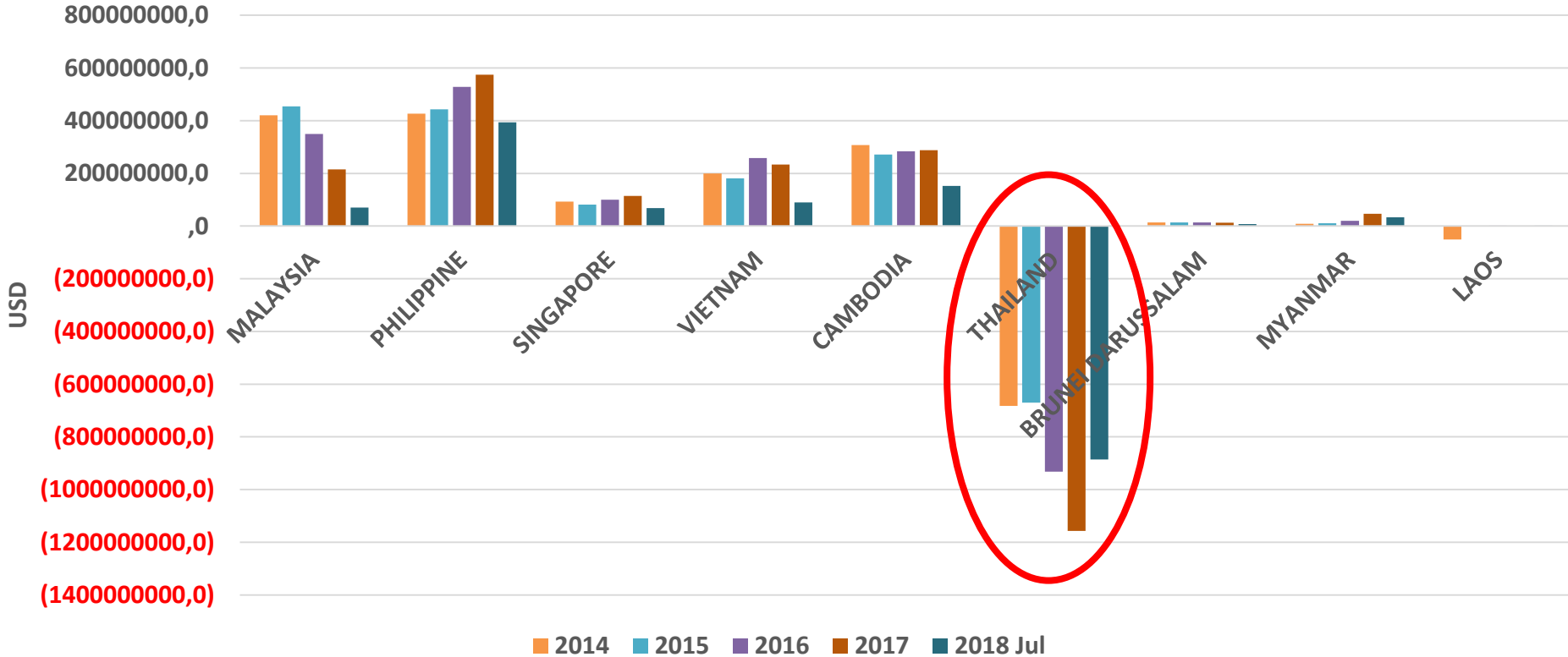
## Total Indonesia General Trade | 55 Categories



# Trade Balance of Semi processed & Processed Food in 2014-2018 (July)

In USD . Source: BPS/ Ministry of Trade

## Indonesia – ASEAN

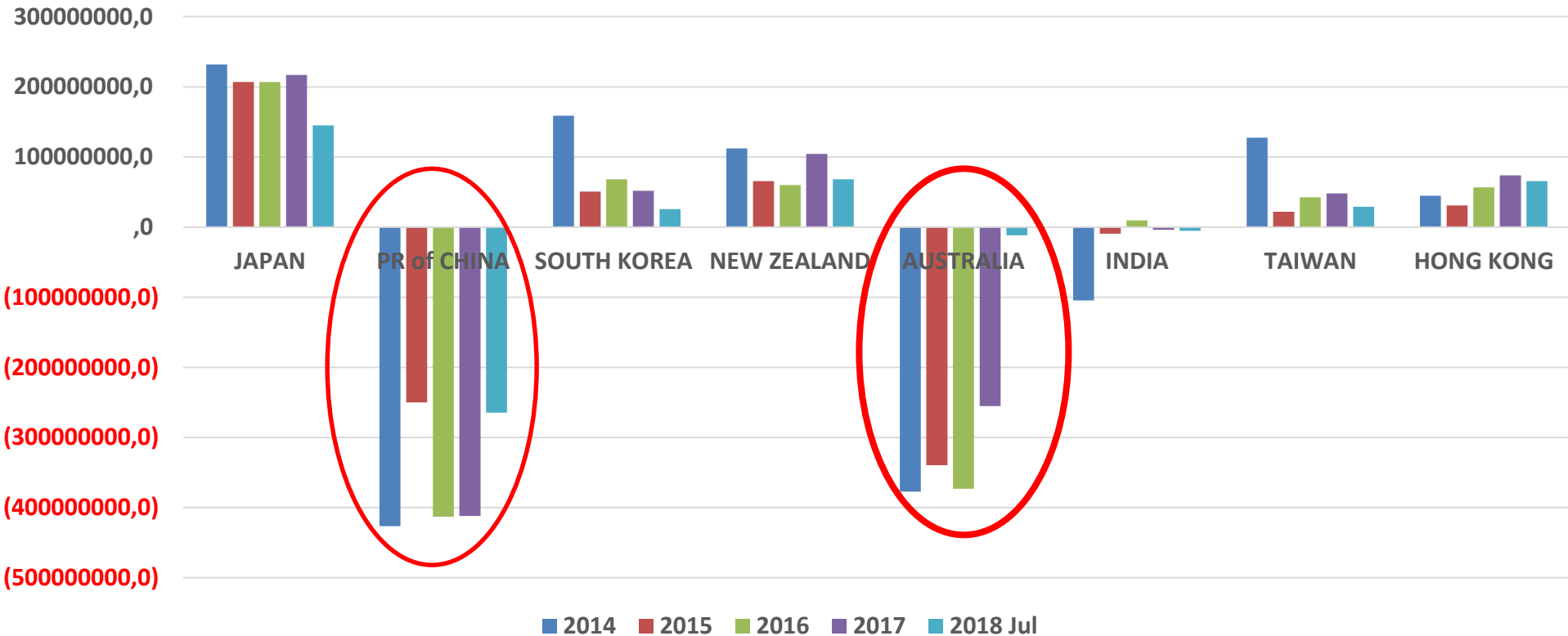


Huge Export Potential To Be Explored

# Trade Balance of Semi processed & Processed Food in 2014-2018 (July)

In USD . Source: BPS/ Ministry of Trade

Indonesia – RECP plus

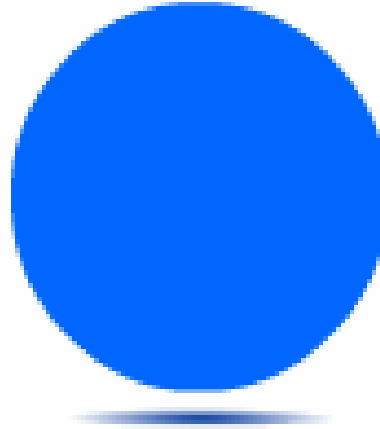


Huge Export Potential To Be Explored

# Global Value Chain

## Raw Material:

- Availability, continuity and sustainability
- Quality, Time Delivery, Price competitiveness
- Planning upstream – downstream
- Regulations and government policies must support sustainable raw materials and business friendly
- **Innovation is a must**



## Added Value Products:

- Market more open & difficult to stop Global Sourcing
- Competition is tougher
- Food Products must be innovative with new products to meet consumer's needs and lifestyle
- Anticipation of rapid changes in the global market
- Disruptive economic

The food industry is still dependent on imported raw materials (semi processed) →  
**Opportunity investment in intermediate industry**

Added value production →  
**Opportunity investment in downstream industry to fulfill Global Market**

**The world economy is expected to continue to grow, although the challenges and risks still overshadow the world economy**



## IMF, WB laud Jokowi`s speech on developed countries` threat

Reporter: Arianza © 12th October 2018



President Joko Widodo (second from right), IMF Executive Director Christina Lagarde (third from right) and World Bank Group President Jim Yong Kim (right) walk to the venue of the IMF-World Bank Group annual meetings 2018 at Ball Nusa Dua Convention Center, Nusa Dua, Bali, on Friday (Oct 12, 2018). ANTARA FOTO/ICCom/IMF-WBG/Wilans Widiantorubeni

Nusa Dua, Bali, (ANTARA News) - The International Monetary Fund (IMF) and the World Bank (WB) have expressed their appreciation over President Joko Widodo`s speech which stated that the intense competition among developed countries without regarding world economic interests could pose a threat, including to the developed countries themselves.

"I have to admit when I heard President Joko Widodo`s remarks, I thought we should go home because we would not be able to give a speech as good as Joko Widodo`s," World Bank President Jim Yong Kim said jokingly at the 2018 IMF-WB Meeting General Assembly here Friday.

Kim also praised the Indonesian government`s preparations in organizing the 2018 IMF-WB Annual Meeting. The thorough preparation was carried out amid Indonesia`s difficulties in facing the earthquake and tsunami disasters in Lombok (West Nusa Tenggara) and Central Sulawesi.

"We firmly stand with Indonesia. We fully support the government and the people of Indonesia," Kim said.

In his remarks, Kim reminded countries across the world to increase attention to the quality of human resources and human capital in order to create a prosperous life for all people.

## Cooperation & Coordination to Avoid Economic Damage

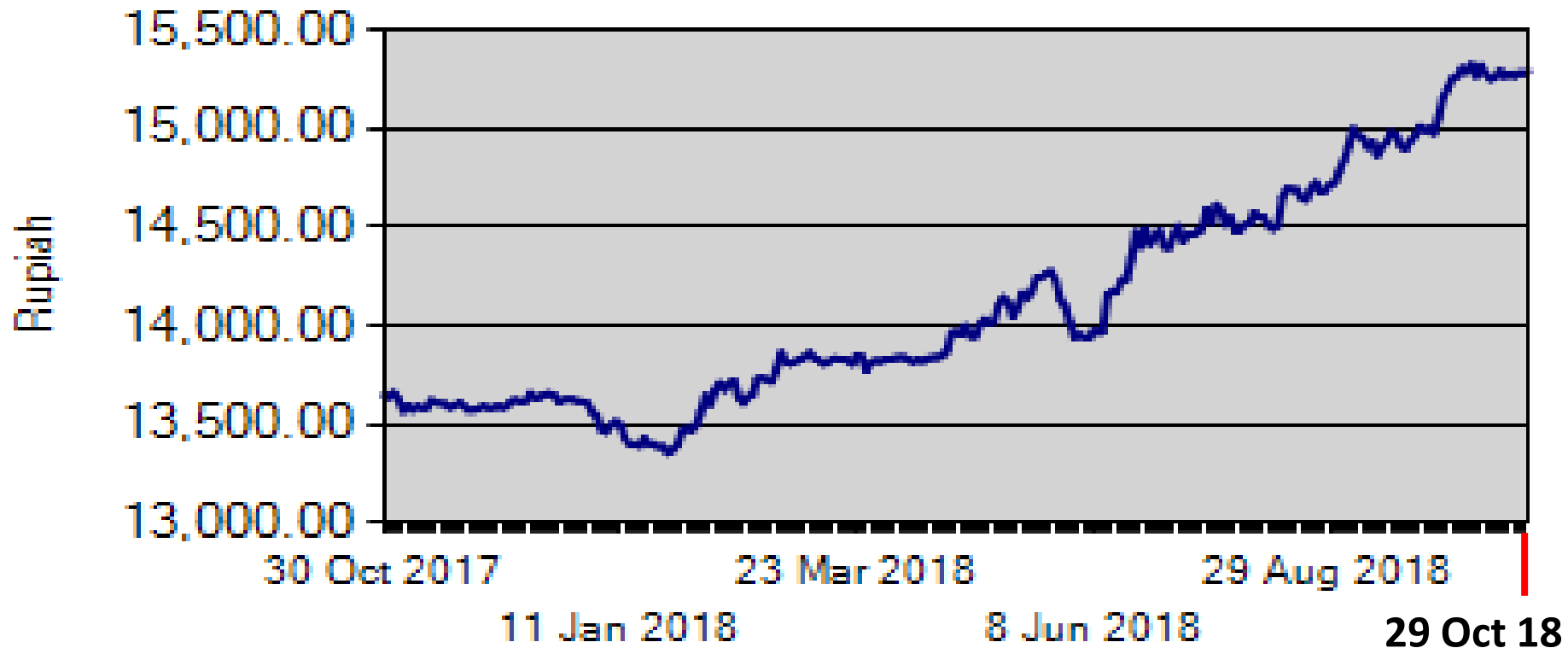
IMF & WB have expressed their appreciation over President Joko Widodo`s speech which stated that the **intense competition among developed countries** without regarding world economic interests could pose a **threat, including to the developed countries themselves.**

- **Relations** among developed economies seemed to be **broken.**
- The **low cooperation and coordination** have led to many **problems** such as an increase in crude oil prices and currency dynamics

### Game of Thrones

- The series Game of Thrones illustrates **the struggle for power between Great Houses**, in which they want to win by **bringing down others.**
- When the GH were busy fighting they were **not aware that there was a big threat** from the North, that is, the Evil Winter people who **wanted to destroy and enclose** the world with ice and destruction

### Kurs Transaksi - USD (Exchange Rates on Transaction)



Source: Bank Indonesia

- Cost related to raw material import, export , energy, logistic, etc.

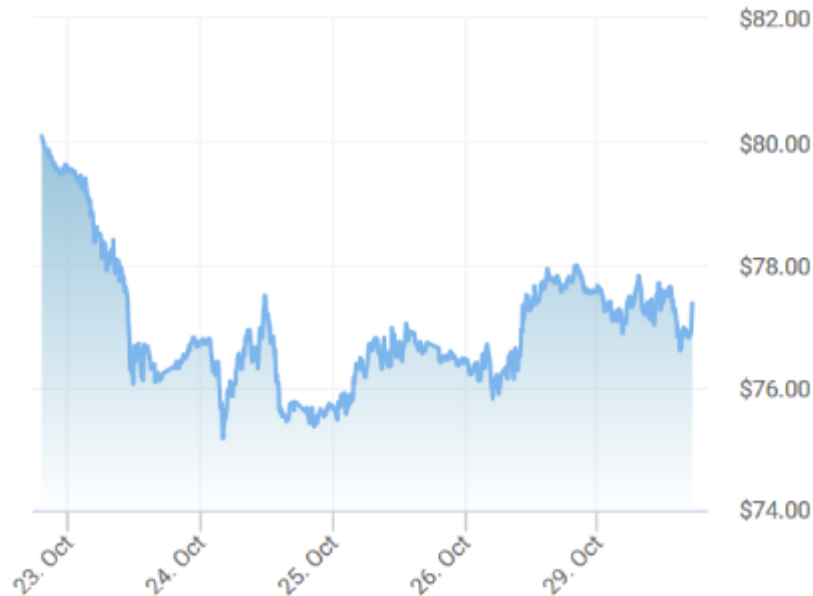
# In the past 1 year, unstable price of oil

17:40 pm CDT 29/10/2018

Technicals

**Brent Crude**

**77.37 -0.37%**



1D | 1WK | 1M | 1YR | Max

Share



17:39 pm CDT 29/10/2018

Technicals

**WTI Crude**

**66.66 -0.57%**

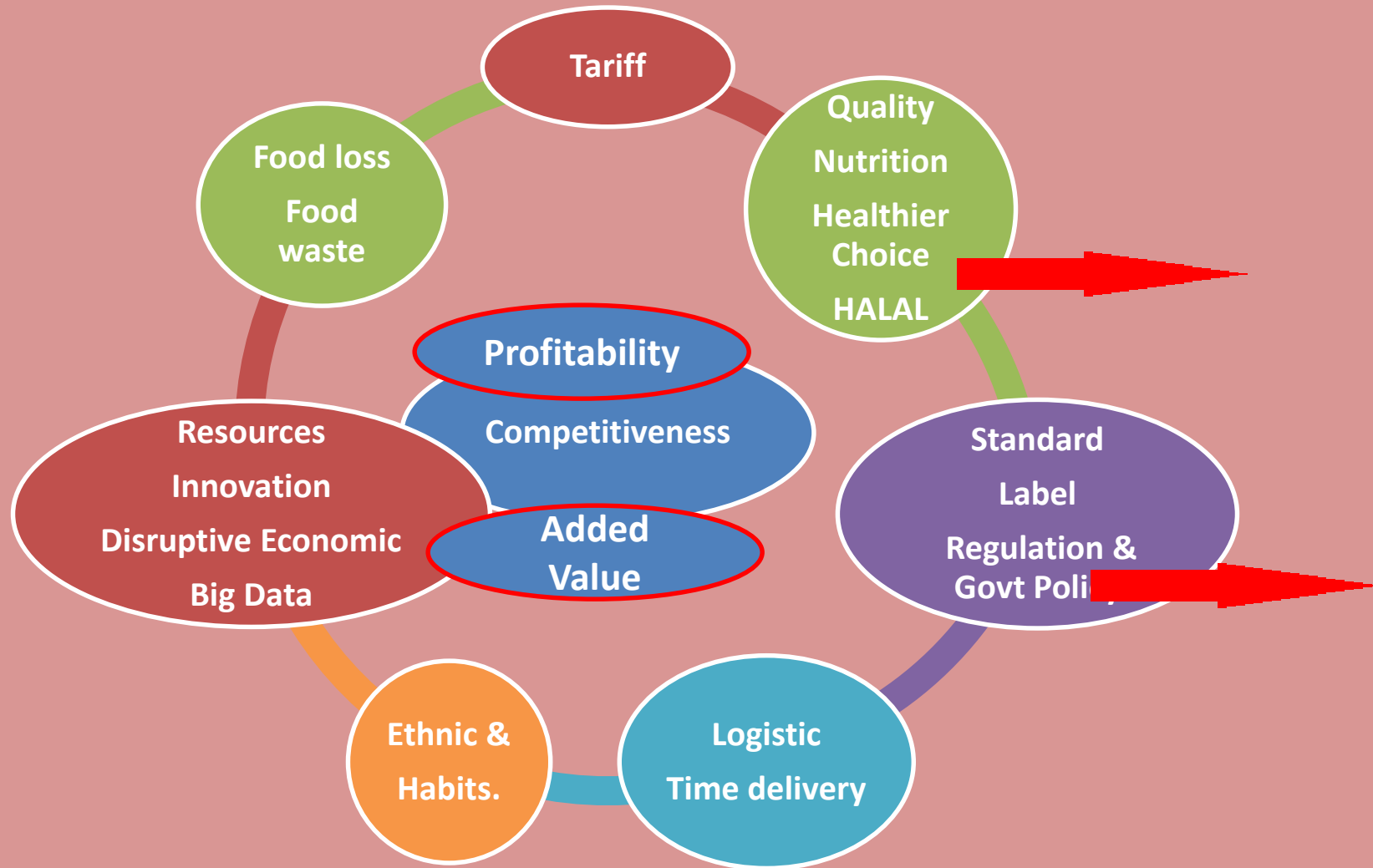


1D | 1WK | 1M | 1YR | Max

Share



# Challenges Along the Food Supply Chain



# World Bank Report (Sept, 18)

Despite higher global uncertainty, the Indonesian economy grew by **5.3 %** yoy in Q2, up from 5.1 % in Q1 and above consensus forecasts also of 5.1 %.

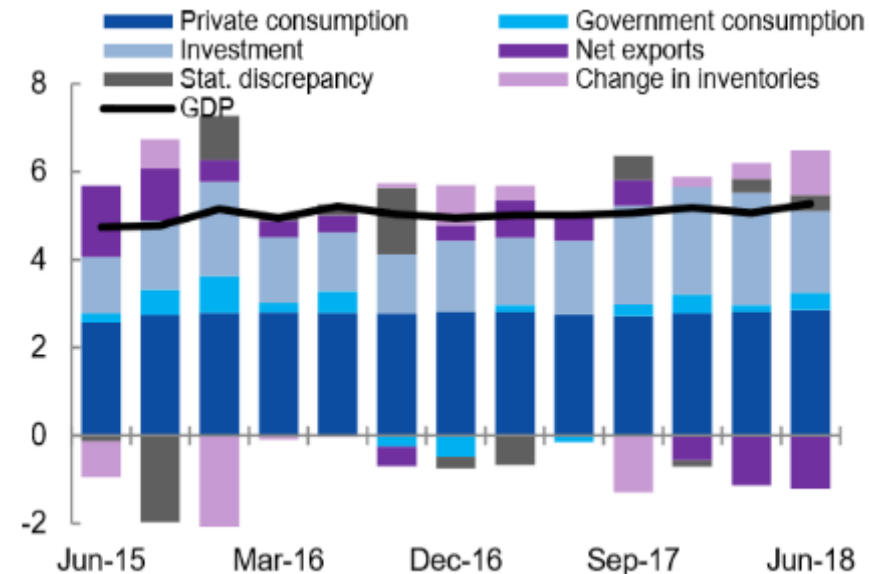
Real GDP growth is expected to rise to 5.2 percent in 2018 with **stronger domestic demand**

**Stronger consumption** offset the weaker investment growth and lower net exports (contributions to yoy growth, percentage points)

		2017	2018f	2019f
<b>Real GDP</b>	(Annual percent change)	5.1	5.2	5.2
<b>Consumer price index</b>	(Annual percent change)	3.8	3.4	3.7
<b>Current account balance</b>	(Percent of GDP)	-1.7	-2.4	-2.3
<b>Government budget balance</b>	(Percent of GDP)	-2.5	-2.1	-1.8

Source: BI; Central Bureau of Statistics (BPS); Ministry of Finance; World Bank staff calculations

Note: 2017 actual outcome; f stands for World Bank forecast



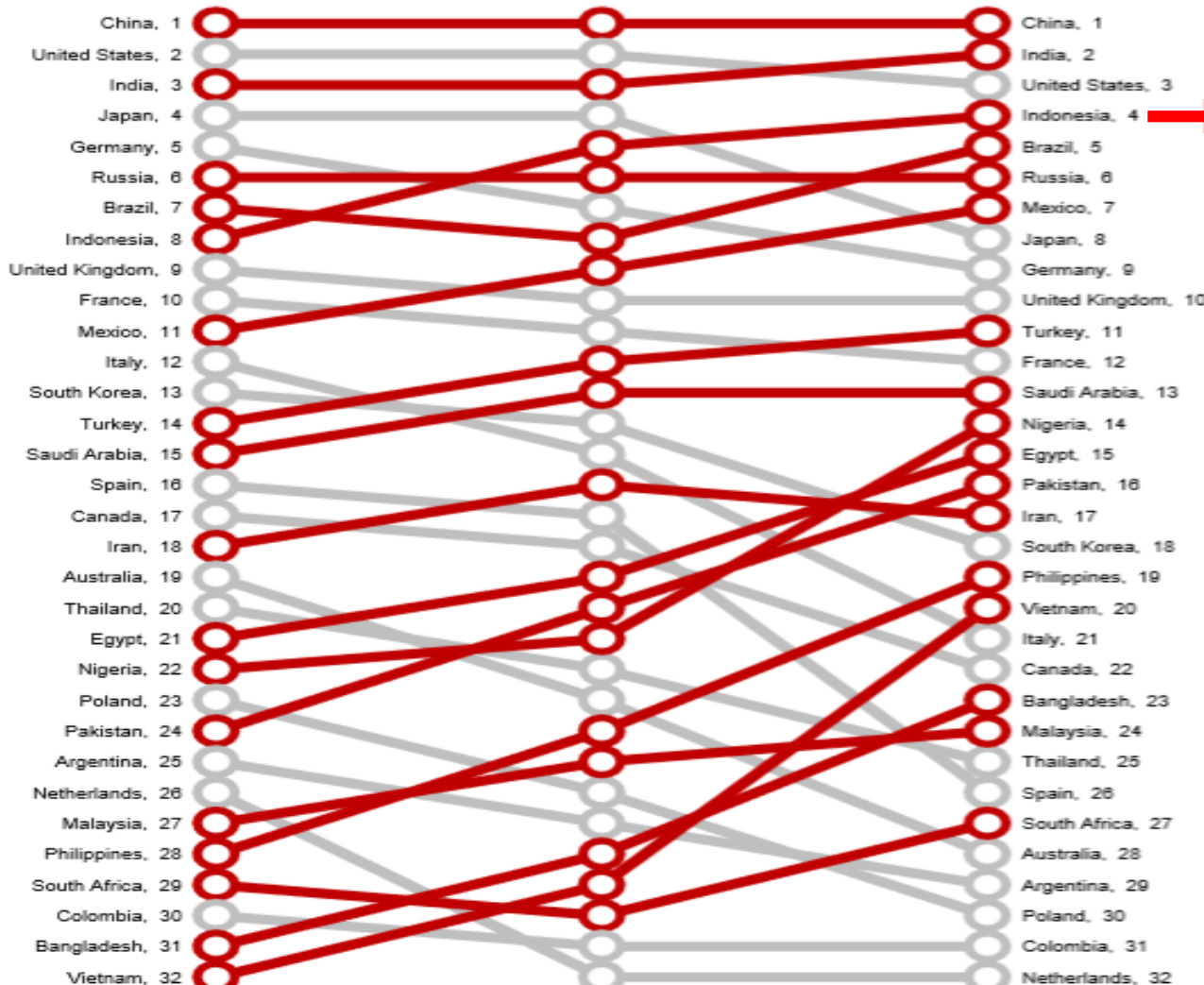
Source: BPS; World Bank staff calculations

# Projected GDP Ranking (at PPPs).

2016

2030

2050



**Projected Indonesia Become  
#4 in 2050**

**Indonesia market?**

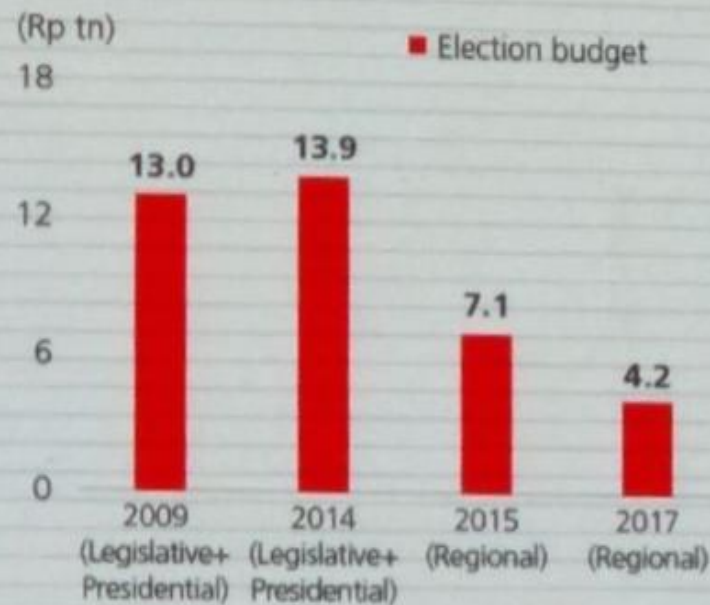
# Indonesia 2018 The Year of Consumption



## CATALYST IN 2018: POLITICAL SPENDING

ELECTION SPENDING IS EXPECTED TO HELP CONSUMPTION BOUNCE

11



**+0.2%**

Additional growth  
to GDP  
due to election  
in 2018



# Halal Market

# 10 Countries with the Largest Muslim Populations, 2010 and 2050

[http://www.pewforum.org/2015/04/02/muslims/pf\\_15-04-02\\_projectionstables74/](http://www.pewforum.org/2015/04/02/muslims/pf_15-04-02_projectionstables74/)

## 10 Countries With the Largest Muslim Populations, 2010 and 2050

	2010 MUSLIM POPULATION	% OF WORLD'S MUSLIM POPULATION IN 2010		2050 MUSLIM POPULATION	% OF WORLD'S MUSLIM POPULATION IN 2050
<b>1 Indonesia</b>	209,120,000	13.1%	<b>1 India</b>	310,660,000	11.2%
<b>2 India</b>	176,200,000	11.0	<b>2 Pakistan</b>	273,110,000	9.9
<b>3 Pakistan</b>	167,410,000	10.5	<b>3 Indonesia</b>	256,820,000	9.3
<b>4 Bangladesh</b>	134,430,000	8.4	<b>4 Nigeria</b>	230,700,000	8.4
<b>5 Nigeria</b>	77,300,000	4.8	<b>5 Bangladesh</b>	182,360,000	6.6
<b>6 Egypt</b>	76,990,000	4.8	<b>6 Egypt</b>	119,530,000	4.3
<b>7 Iran</b>	73,570,000	4.6	<b>7 Turkey</b>	89,320,000	3.2
<b>8 Turkey</b>	71,330,000	4.5	<b>8 Iran</b>	86,190,000	3.1
<b>9 Algeria</b>	34,730,000	2.2	<b>9 Iraq</b>	80,190,000	2.9
<b>10 Morocco</b>	31,930,000	2.0	<b>10 Afghanistan</b>	72,190,000	2.6
<b>Subtotal</b>	1,053,010,000	65.8	<b>Subtotal</b>	1,701,070,000	61.6
<b>Subtotal for Rest of World</b>	546,700,000	34.2	<b>Subtotal for Rest of World</b>	1,060,410,000	38.4
<b>World Total</b>	1,599,700,000	100.0	<b>World Total</b>	2,761,480,000	100.0

Source: The Future of World Religions: Population Growth Projections, 2010-2050. Population estimates are rounded to the nearest 10,000. Percentages are calculated from unrounded numbers.

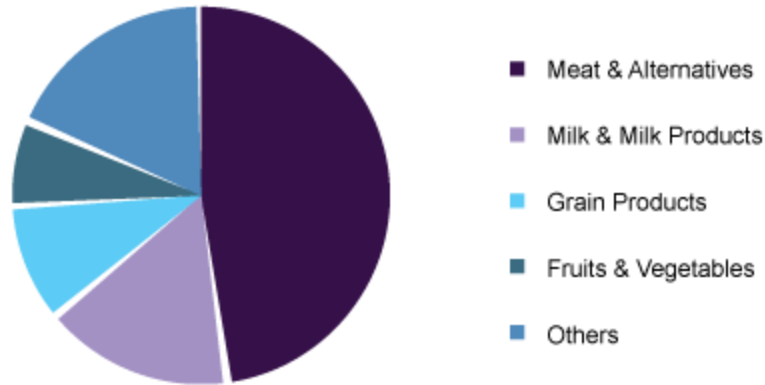
# State of the Global Islamic Economy (GIE) Report 2017/2018 (73 Countries) by Thomson Reuters

## GLOBAL ISLAMIC ECONOMY

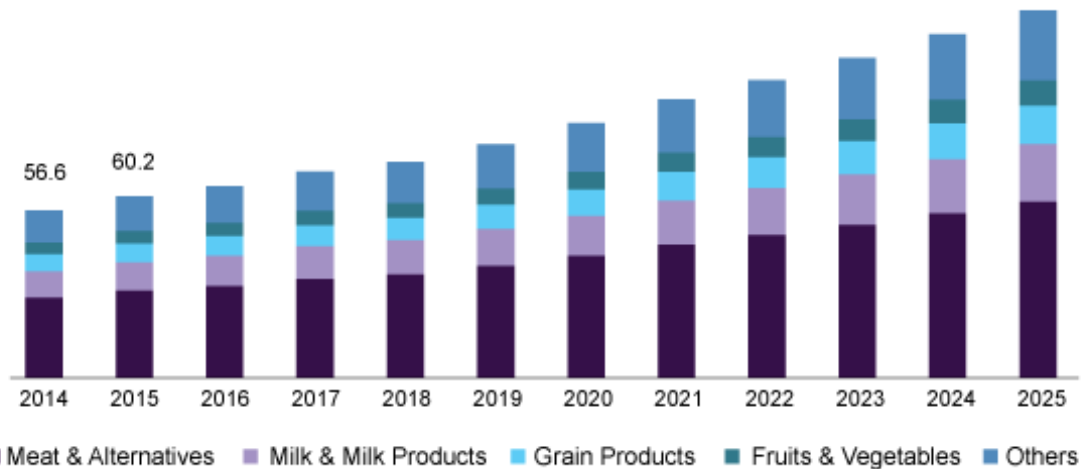
Global Islamic Economy Sectors (US\$ Billion)



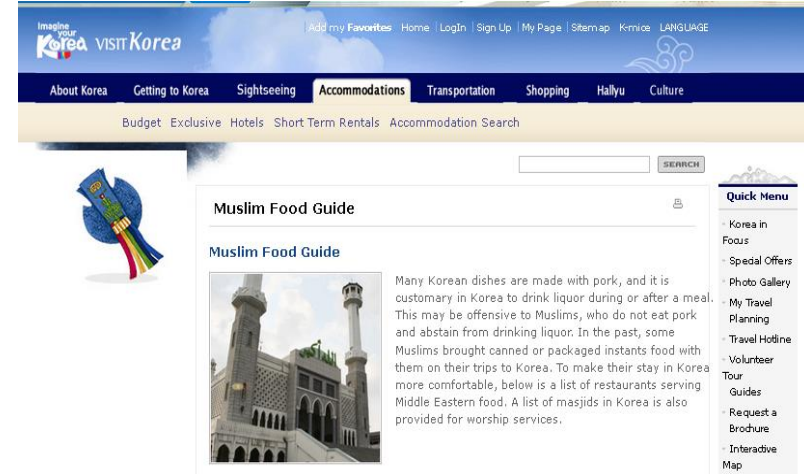
Global Muslim Spend on Food, Beverage & Lifestyle Sectors:



Indonesia Halal Food & Beverage Market by Product, 2014 - 2025 (USD Billion)



# Non Muslim Countries Also Take Attention to Halal



Japan



Korea

Halal Times In China

# Halal Food in China

## FOOD PRODUCTS

### Why China wants a bite of the booming halal food market

Aza Wee Sile

Monday, 24 Aug 2015 | 7:32 PM ET



<http://www.cnbc.com/2015/08/24/china-wants-a-bite-of-the-booming-halal-food-market.html>



Xiao Lu Chu | Getty Images

The famous Muslim Snack Street in Xi An, China.

A new Euromonitor report forecasts that Muslim consumers will make up more than a quarter of the world's population by 2030, and China wants to play an active role in feeding them.

Ff



China is not an obvious candidate as a halal food powerhouse. The 26 million-strong Muslim population make up just 2 per cent of China total population, with the vast majority living in Xinjiang and Ningxia provinces in Northwest China, the most underdeveloped part of the country.

China, however, is forging ahead. Under its "**One Belt One Road**" initiative that aims to recreate **the Silk Road land and maritime trade routes**, China has sought opportunities for halal trade with Muslim

# Various Halal Logo in 6 AMS

Harmonization & Mutual Recognition is a challenges



- E-Commerce is borderless
- What logo will you put on your products?
- Who will certify your Halal?
- What about Halal assurance along the supply chain?
- What is the regulation? Be Ready?



# Halal System in Indonesia

# New Head of BPJPH as per 2 August 2017

He was a Founder of  
IHW

President Regulation  
No. 83/2015  
article 4 k & 45-48



## INDONESIA HALAL WATCH

*mengucapkan*

**SELAMAT & SEMOGA BAROKAH  
UNTUK UMAT**

**Atas dilantiknya**

**Prof. Ir. Sukoso., M.Sc., Ph.D**

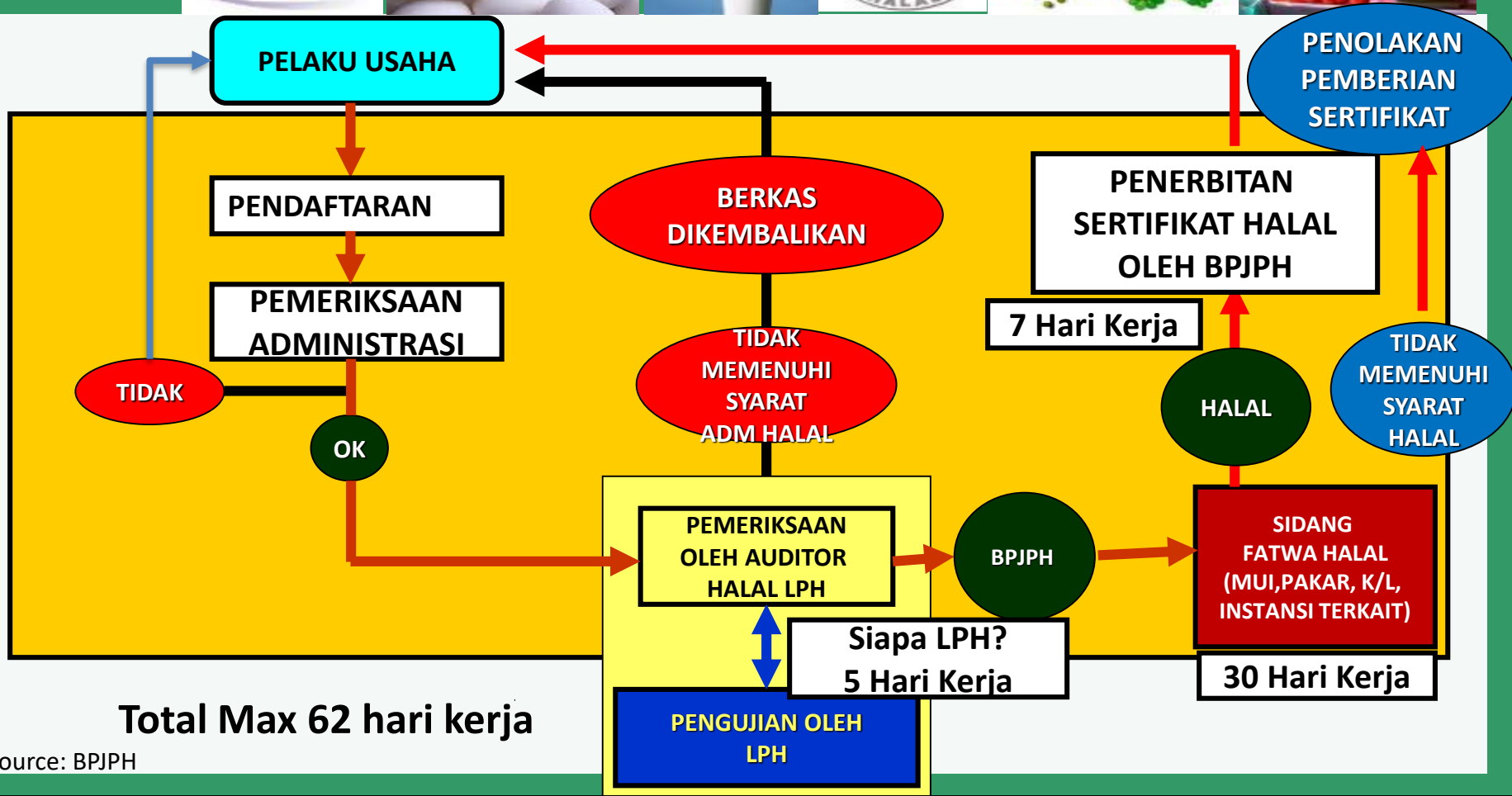
SEBAGAI

**KEPALA BADAN  
PENYELENGGARA JAMINAN  
PRODUK HALAL**

Kementerian Agama RI



# Halal Certification Process

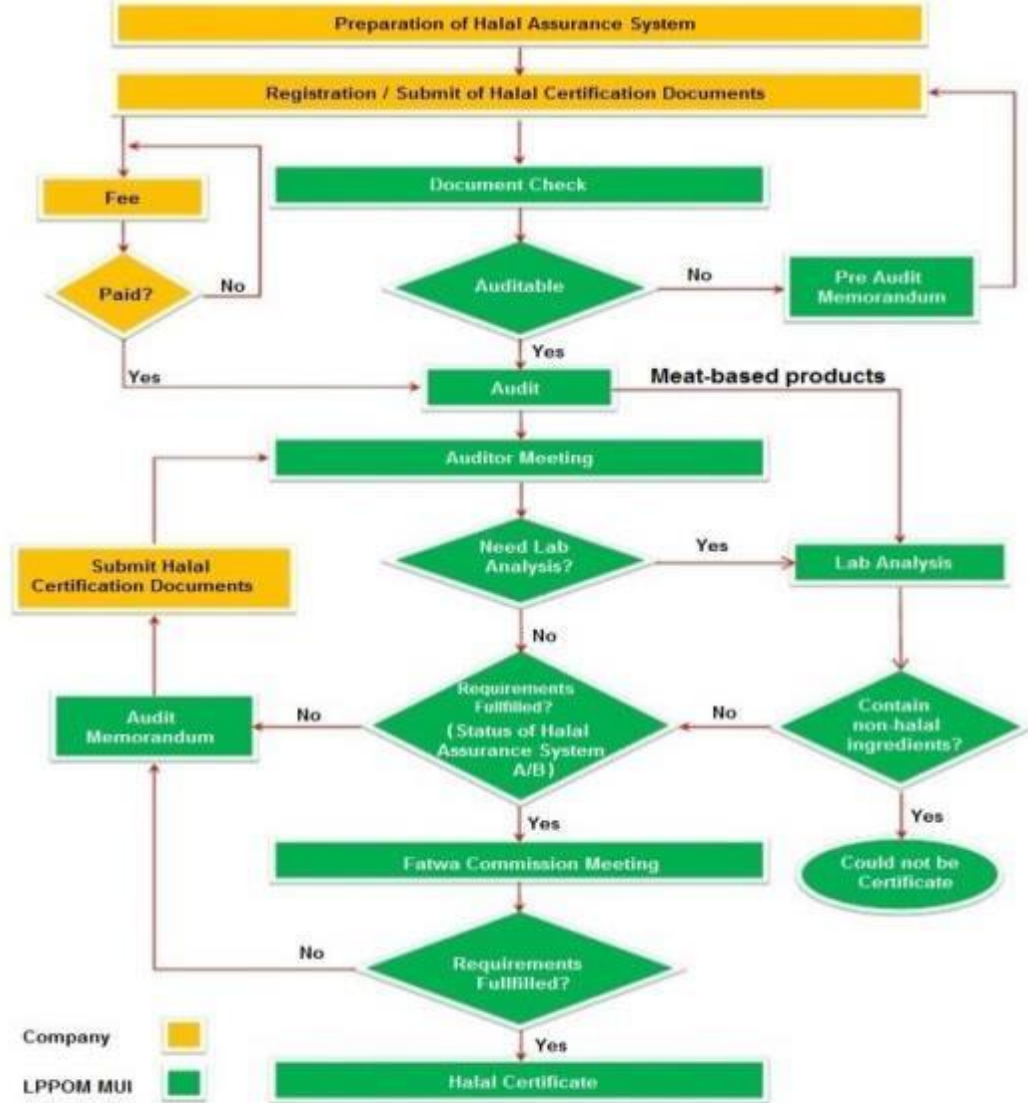


# HALAL CERTIFICATION REQUIREMENTS POLICIES AND PROCEDURES (before new Halal Product Assurance Act) HAS 23000:2

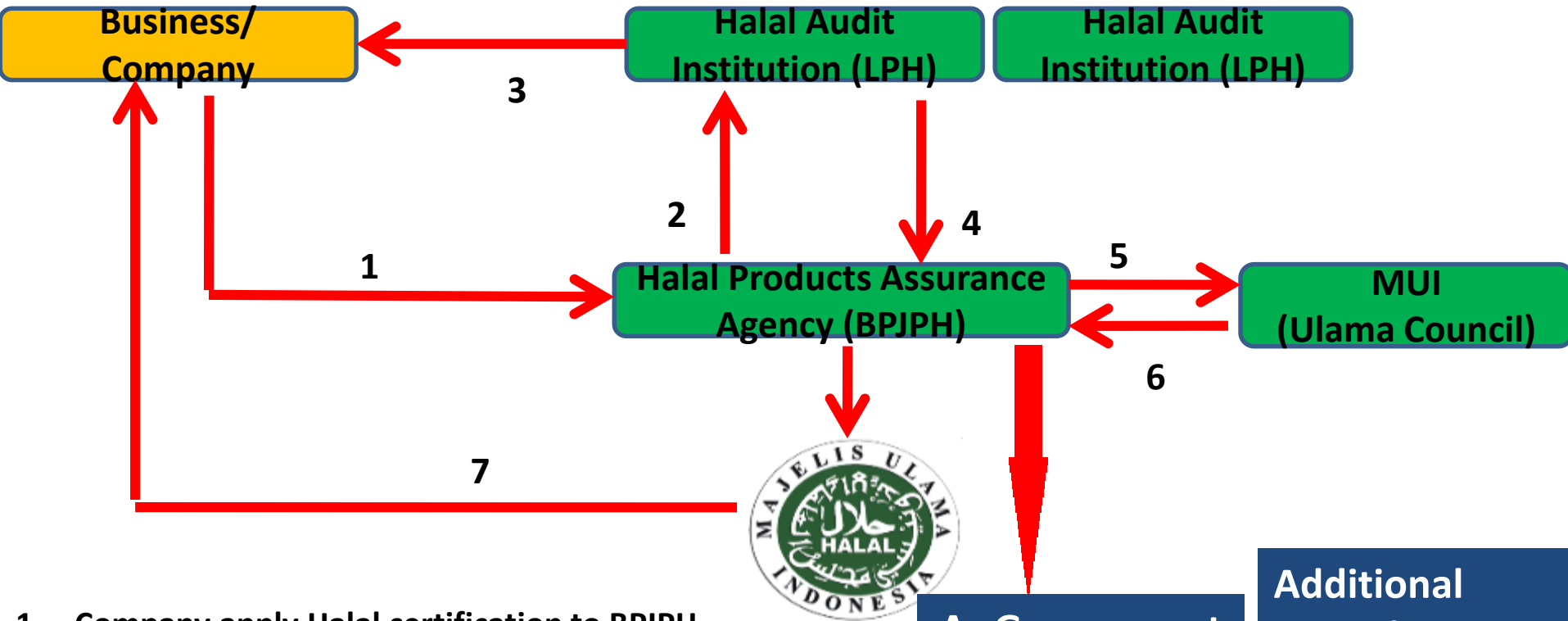


CEROL -SS23000

What next??



# Halal Act No 33 /17 October 2014 Halal Product Assurance (JPH)



1. Company apply Halal certification to BPJPH
2. BPJPH appoint LPH to audit Company
3. LPH audit Company
4. LPH report to BPJPH
5. BPJPH ask MUI
6. MUI release Fatwa Halal to BPJPH
7. BPJPH release Halal Certificate and Label to Company

**As Government  
agency →  
State present &  
Recognized**

**Additional  
procedure &  
institution be  
involved  
(MoRA, BPJPH,  
LPH, MUI)**

## Pemerintah 'Ambil Alih' Kewenangan MUI soal Produk Halal

### MUI Dukung Penuh Peresmian BPJPH Oleh Kemenag

9 KURNIA 15 FRIDAY, 13 OCTOBER 2017 | 17:23 WIB INDONESIA NASIONAL

"Dengan diresmikannya BPJPH hal-hal yang berkaitan dengan perlindungan dan jaminan kehalalan dari sebuah produk makanan, minuman, obat, kosmetika dan sebagainya menjadi tanggung jawab penuh negara dalam hal ini pemerintah," kata Zainut dalam keterangan tertulis di Jakarta, Jumat (13/10).

**Negara Hadir untuk mendukung industri Halal & menghilangkan Hambatan**

# Challenges & Opportunities in Halal Trade, Global Issues

1. The world population increased, which now have reached more than 7 Billions peoples . **Indonesia has the biggest Moslem population is the world**
2. Consumers are increasingly concerned about food safety, healthy, Halal, etc
3. The development of technology and knowledge (Raw Material, Food Ingredients, Processing, Method of Analysis, GMO technology, etc.) to be a new challenge for the World's Moslem Scholars & Government to address the Halalness
4. In Global Trade, FTA and Liberalization of Tariff is on going , However, Food Regulation is getting more stringent & Non-Tariff Measure increased. Protection & competition through the application of Non-Tariff Measure. **Halal Certification and Logo** is the big challenges and could become a new Barriers to trade

# Tantangan UU No 33 /2014 JPH

## Pasal 4

Produk yang masuk, beredar, dan diperdagangkan di wilayah Indonesia wajib bersertifikat halal.

## Pasal 67

- (1) Kewajiban bersertifikat halal bagi Produk yang beredar dan diperdagangkan di wilayah Indonesia sebagaimana dimaksud dalam Pasal 4 mulai berlaku 5 (lima) tahun terhitung sejak Undang-Undang ini diundangkan.
- (2) Sebelum kewajiban bersertifikat halal sebagaimana dimaksud pada ayat (1) berlaku, jenis Produk yang bersertifikat halal diatur secara bertahap.
- (3) Ketentuan mengenai jenis Produk yang bersertifikat halal secara bertahap sebagaimana diatur pada ayat (2) diatur dalam Peraturan Pemerintah.

## Pasal 26

- (1) Pelaku Usaha yang memproduksi Produk dari Bahan yang berasal dari Bahan yang diharamkan sebagaimana dimaksud dalam Pasal 18 dan Pasal 20 dikecualikan dari mengajukan permohonan Sertifikat Halal.
- (2) Pelaku Usaha sebagaimana dimaksud pada ayat (1) wajib mencantumkan keterangan tidak halal pada Produk.

Produk Halal namun belum Bersertifikat ??  
Self declaration & endorsed by LPH??

# Masa Berlaku & Ijin Edar/Cantum Halal

## Pasal 42

- (1) Sertifikat Halal berlaku selama 4 (empat) tahun sejak diterbitkan oleh BPJPH, kecuali terdapat perubahan komposisi Bahan.
- (2) Sertifikat Halal wajib diperpanjang oleh Pelaku Usaha dengan mengajukan pembaruan Sertifikat Halal paling lambat 3 (tiga) bulan sebelum masa berlaku Sertifikat Halal berakhir.
- (3) Ketentuan lebih lanjut mengenai pembaruan Sertifikat Halal diatur dalam Peraturan Menteri.

**2 → 4 tahun**

## Pasal 38

Pelaku Usaha yang telah memperoleh Sertifikat Halal wajib mencantumkan Label Halal pada:

- a. kemasan Produk;
- b. bagian tertentu dari Produk; dan/atau
- c. tempat tertentu pada Produk.

## Pasal 39

Pencantuman Label Halal sebagaimana dimaksud dalam Pasal 38 harus mudah dilihat dan dibaca serta tidak mudah dihapus, dilepas, dan dirusak.

**BPOM masih diperlukan untuk Ijin Cantum Logo Halal?  
Bagaimana yang tidak melalui BPOM (MD/ML?)**

# Sistem Jaminan Halal (SJH)

## Pasal 24

Pelaku Usaha yang mengajukan permohonan Sertifikat Halal wajib:

- a. memberikan informasi secara benar, jelas, dan jujur;
- b. memisahkan lokasi, tempat dan alat penyembelihan, pengolahan, penyimpanan, pengemasan, pendistribusian, penjualan, dan penyajian antara Produk Halal dan tidak halal;
- c. memiliki Penyelia Halal; dan
- d. melaporkan perubahan komposisi Bahan kepada BPJPH.

**Halal bukan sekedar Sertifikat →  
Sistem Jaminan Halal  
Penyelia Halal bertanggung jawab terhadap  
Proses Produk Halal (PPH)**

- Sistem & Prosedur
  - Administrasi
  - Infrastructure
  - SDM

# Kerjasama International

## Pasal 46

- (1) Pemerintah dapat melakukan kerja sama internasional dalam bidang JPH sesuai dengan ketentuan peraturan perundang-undangan.
- (2) Kerja sama internasional dalam bidang JPH sebagaimana dimaksud pada ayat (1) dapat berbentuk pengembangan JPH, penilaian kesesuaian, dan/atau pengakuan Sertifikat Halal.
- (3) Ketentuan lebih lanjut mengenai kerja sama JPH sebagaimana dimaksud pada ayat (2) diatur dengan atau berdasarkan Peraturan Pemerintah.

## Pasal 47

- (1) Produk Halal luar negeri yang diimpor ke Indonesia berlaku ketentuan sebagaimana diatur dalam Undang-Undang ini.
- (2) Produk Halal, sebagaimana dimaksud pada ayat (1) tidak perlu diajukan permohonan Sertifikat Halalnya sepanjang Sertifikat Halal diterbitkan oleh lembaga halal luar negeri yang telah melakukan kerja sama saling pengakuan sebagaimana dimaksud dalam Pasal 46 ayat (2).

# Percepatan MRA

# **LIST OF HALAL CERTIFICATION BODIES**

- 1. LPPOM MUI recognize halal certificates issued by approved halal certification body only for product produced in the country where the halal certification body located, except for product produced in Europe can be used halal certificate by any approved halal certification body located in Europe.**
- 2. There are still possibilities for LPPOM MUI to ask supporting document to clarify the critical points of certain certified products.**
- 3. The MUI decree regarding list of approved foreign halal certification body is effective for 2 (two) years as of the date it is stipulated and it will be monitored and evaluated once a year.**
- 4. There are 37 Halal Certifier Bodies approved by LPPOM MUI from 21 country, contain 32 bodies approved for (cattle) slaughtering category, 32 bodies approved for raw material category, 16 bodies approved for flavor category.**
- 5. Updated December 2016.**

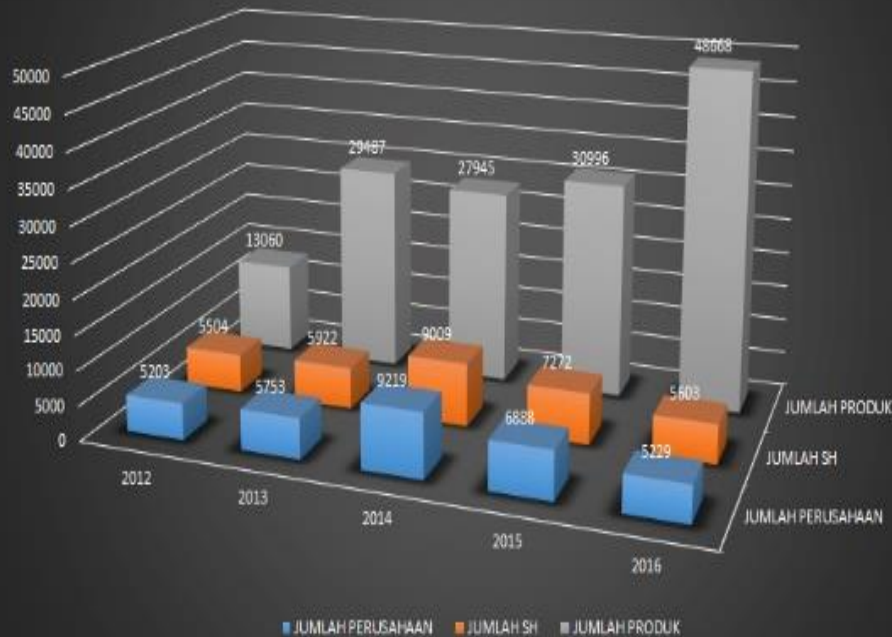
# LIST OF APPROVED FOREIGN HALAL CERTIFICATION BODIES- ASIA (LPPOM MUI)

Country	Name of Halal Certification Bodies	Category			Status/ Expired
		Slaughtering	Raw Material	Flavor	
Singapore	Majelis Ugama Islam Singapore (MUIS)	■	■	■	2018/06/10
Malaysia	Jabatan Kemajuan Islam Malaysia (JAKIM)	■	■	■	2018/06/10
Brunei Darussalam	Bahagian Kawalan Makanan Halal Jabatan Hal Ehwal Syariah	■			2018/06/10
Japan	Muslim Professional Japan Association (MPJA)	■	■		2017/06/24
Japan	The Japan Moslem Association (JMA)		■	■	2018/08/16
Taiwan	Taiwan Halal Integrity Development Association (THIDA)	■	■		2018/06/27
India	Jamiat Ulama Halal Foundation	■			2018/06/27
India	Jamiat Ulama I-Hind Halal Trust	■			2018/08/23
Hongkong	Asia Pacific Halal Council Co Ltd (APHC)	■	■		
Thailand	The Central Islamic Comitte of Thailand (CICOT)	■	■		2018/11/07

# Tantangan BPJPH → LPPOM – MUI Statistic

## Number of Halal Certification by MUI (2010 – 2017)

DATA SERTIFIKASI HALAL LPPOM MUI PROVINSI  
PERIODE 2012 - 2016



\*) Data per tanggal 1 Januari 2017

DATA SERTIFIKASI HALAL LPPOM MUI PUSAT  
PERIODE 2012 - Okt 2017



\*) Data per tanggal 11 Oktober 2017

# Tantangan BPJPH

## Perusahaan Belum Sertifikasi

Senin 16 April 2018 16:39 WIB

Rep: Adinda Pryanka/ Red: Agus Yulianto

<https://www.republika.co.id/berita/dunia-islam/islam-nusantara/18/04/16/p79utd396-ketua-lppom-mui-ada-35-juta-perusahaan-belum-sertifikasi>

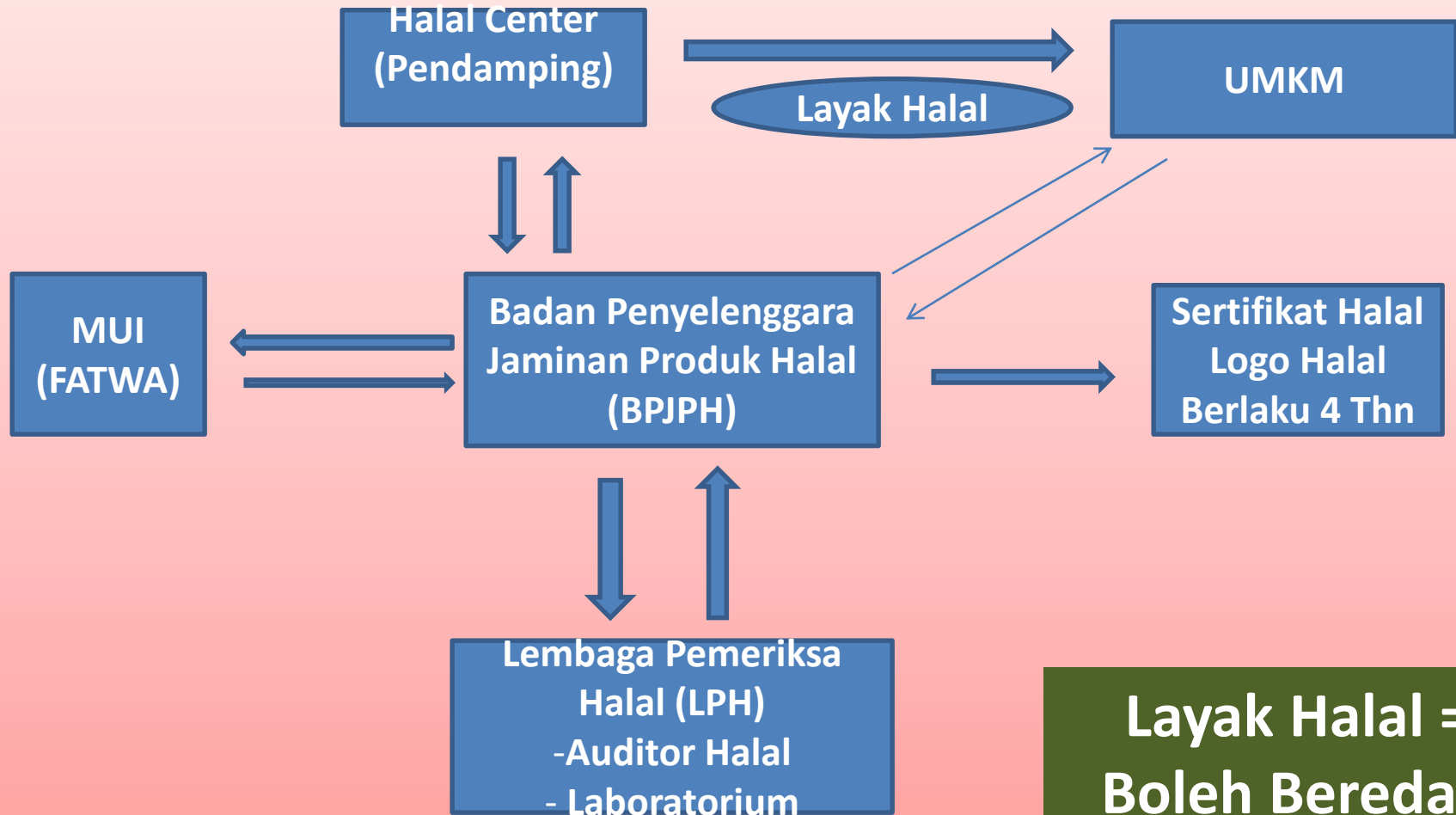


Ketua LPPOM MUI, Lukmanul Hakim

Foto: Republika/Agung Supriyanto

**Padahal, jumlah auditor terbatas yakni hanya sekitar 1.190 orang di seluruh Indonesia**

# Model Sertifikasi Halal UMKM



**Layak Halal =  
Boleh Beredar?**

# Multi LPH

# LPPOM MUI → MULTI LPH



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### LABORATORIUM

- DAFTAR TUNGGU
- MASUK LAB
- PROSES
- FINAL
- DOKUMEN LAB





## What to do ? → Kepastian Berusaha & Jaminan Halal

**Negara Hadir**  
**PP Halal disahkan 2018**  
**Berlaku bertahap**  
**Oktober 2019**

**Kepastian Waktu**  
**Registrasi**

**Tidak membebani biaya**  
**produksi & Harga**  
**Konsumen**

**Bimbingan UKM**

**Kerjasama LN**

**Kepastian bagi Konsumen**



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**Thank you**

