

# Directory 2018

The Indonesian  
Iron & Steel Industry Association



## II. THE IISIA STRUCTURE ORGANIZATION GROWTH 2018 - 2020

The Indonesian Iron and Steel Industry Association (IISIA) is an association which is the place and host of all iron and steel companies from the upstream to downstream steel industries. IISIA was established in Jakarta with **notarial deed No. 01 - [01 September 2008] by Notary Dewi Tenty Septi Artiany, SH, M.Kn.** The age of IISIA looks relatively young that in 2019 it has only reached 10 years, but base on the historical this association is a fusion of the Association of All Indonesian Steel Manufacturers Association known as **GAPBESI**.

At that time GAPBESI only with the Federation consists of several associations of clusters that exist in the steel industry, where such associations work together to solve the problems of affairs or national through GAPBESI, while problems beyond that will be handled by Particular association. Association members who register as members of GAPBESI consist of six associations with total members around 123 [one hundred twenty three] companies engaged in steel Industry as Below List:

- 1. ABBEPSI** : Indonesia Billet, Manufacturers' Association, Wire Rod, Rebar and Profile, with a total membership of 31 manufacturers.
- 2. APBALS** : Indonesia Cutting Sheet Steel Association, which consists of 20 manufacturers.
- 3. APBALI** : Indonesian Association of Steel sheet, with total membership of 7 manufacturers.
- 4. GAPIPA** : Indonesia Steel Pipe Factory Association, with a total membership of 15 manufacturers
- 5. GAPS** : Indonesia Zinc Factory Association, with the number of members by 15 manufacturers.
- 6. IPPAKI** : Indonesia Nail Factory and Wire Bonding Association, which consists of 35 manufacturers.

In carrying out their activities, each association has an autonomous right, both aimed at advancing its members and in dealing with problems between manufacturers, so that the function of the existence of GAPBESI becomes less effective. Taking into account the foregoing and in order to increase the effectiveness

## II. PERKEMBANGAN & STRUKTUR ORGANISASI IISIA 2018 - 2020

Asosiasi Industri Besi dan Baja Indonesia atau The Indonesian Iron and Steel Industry Association (IISIA) adalah asosiasi yang merupakan wadah dan sekaligus induk bagi seluruh produsen besi dan baja dari industri baja hulu hingga hilir, yang didirikan di Jakarta dengan **akta notaris No. 01 tanggal 1 September 2008 oleh Notaris Dewi Tenty Septi Artiany, SH, M.Kn.** Usia IISIA terlihat relatif masih sangat muda dimana pada tahun 2019 ini baru mencapai 10 tahun, tetapi tidaklah demikian karena sebenarnya asosiasi ini merupakan peleburan dari Gabungan Asosiasi Produsen Besi Baja Seluruh Indonesia yang dikenal dengan nama **GAPBESI**.

Pada waktu itu GAPBESI hanya merupakan Federasi dengan beranggotakan beberapa asosiasi dari kluster yang ada pada industri baja, dimana para asosiasi tersebut bekerja sama dalam mengatasi urusan atau masalah yang bersifat nasional melalui GAPBESI, sementara masalah diluar itu akan ditangani oleh masing-masing asosiasi. Adapun anggota Asosiasi yang masuk sebagai anggota GAPBESI ada 6 (enam) asosiasi dengan jumlah anggota mencapai 123 [seratus duapuluh tiga] perusahaan yang bergerak dibidang baja, yaitu:

- 1. ABBEPSI** : Asosiasi Pabrik Billet, Batang Kawat, Besi Beton dan Profil Seluruh Indonesia, dengan jumlah anggota 31 produsen.
- 2. APBALS** : Asosiasi Pemotong Baja Lembaran Seluruh Indonesia, yang beranggotakan 20 pabrikan.
- 3. APBALI** : Asosiasi Produsen Baja lembaran Indonesia, dengan jumlah anggota sebanyak 7 produsen.
- 4. GAPIPA** : Gabungan Pabrik Pipa Baja Indonesia, dengan jumlah anggota 15 pabrikan
- 5. GAPS** : Gabungan Pabrik Seng Indonesia, dengan jumlah anggota sebesar 15 pabrikan.
- 6. IPPAKI** : Ikatan Pabrik Paku dan Kawat Indonesia, yang beranggotakan 35 pabrikan.

Dalam melakukan kegiatannya masing - masing asosiasi memiliki hak otonom, baik yang bertujuan untuk memajukan anggotanya maupun dalam menangani masalah antar pabrikan, sehingga fungsi keberadaan GAPBESI menjadi kurang efektif. Dengan mempertimbangkan hal tersebut diatas dan dalam

of communication between steel associations and communication between national steel producers and the government, IISIA was formed whose members consist of the merger of the 6 [six] associations mentioned above and is the only steel industry association in Indonesia recognized by the Government, with a total membership of 188 steel producers that produce steel products from upstream to downstream.

After IISIA was officially declared formed, then a plenary meeting was held to ratify the members of the Management and Supervisors and to arrange the organizational structure along with staff to implement the Vision and Mission that had been set.

The composition of the Management and Supervisors of IISIA which for the first time in 2008 - 2013 are as follows;

**a. Management :**

Chairman : Ir. Fazwar Bujang MM BAT  
Vice Chairman 1 : Ismail Mandry  
Vice Chairman 2 : Irvan Kamal Hakim  
Vice Chairman 3 : Djamaluddin  
General Secretary : Hidayat Tri Saputro  
Secretary : Titi Marga Anggraini

**b. Supervisor :**

Supervisor Chief : Ir. H. Suprpto M Eng.  
Member : 1. Ir. Untung Yulaksana Yusuf  
2. Kunj Bihari Trivedi  
3. Gwie Gunato Gunawan  
4. Jimmie Soelaiman  
5. Sofyan Usman  
6. Sugiono Pandy San  
7. Soesamto  
8. Ir. Purwono Widodo  
9. Hardiman Utomo  
10. Justian Suhandinata  
11. Ario Noegroho Setiantoro  
12. Sindu Prawira  
13. H. Rudy Syafruddin Syamsuddin  
14. Agus Salim  
15. Wong Tommy Wijaya  
16. Ismail Mandry  
17. Putu Sri Sundari Inten  
18. Ahmad Banani

The next step is IISIA held the Indonesian Iron & Steel Industry Association National Conference for the first time [National Conference-I] on 12 December 2013 at The Gran Melia Hotel Grand Ballroom - Jakarta, with the agenda of ratifying the aims and objectives of the IISIA

rangka meningkatkan efektifitas komunikasi antar asosiasi baja serta komunikasi antara produsen baja nasional dengan pihak pemerintah, maka dibentuklah IISIA yang anggotanya terdiri dari penggabungan ke 6 [enam] asosiasi tersebut diatas dan merupakan satu-satunya asosiasi industri baja di Indonesia yang diakui oleh Pemerintah, dengan jumlah anggota mencapai 188 produsen baja yang menghasilkan produk baja dari hulu hingga hilir.

Setelah IISIA secara resmi dinyatakan berdiri kemudian dilakukan rapat pleno untuk pengesahan anggota Pengurus dan Pengawas yang merupakan perwakilan dari masing-masing asosiasi, serta menyusun struktur organisasi beserta staf yang bekerja didalamnya untuk melaksanakan Visi dan Misi yang telah ditetapkan .

Susunan Pengurus dan Pengawas IISIA yang untuk pertama kalinya pada tahun 2008 - 2013 adalah sebagai berikut;

**a. PENGURUS :**

Ketua Umum : Ir. Fazwar Bujang MM BAT  
Ketua I : Ismail Mandry  
Ketua II : Irvan Kamal Hakim  
Ketua III : Djamaluddin  
Sekretaris Umum : Hidayat Tri Saputro  
Sekretaris : Titi Marga Anggraini

**b. PENGAWAS :**

Ketua : Ir. H. Suprpto M Eng.  
Anggota : 1. Ir. Untung Yulaksana Yusuf  
2. Kunj Bihari Trivedi  
3. Gwie Gunato Gunawan  
4. Jimmie Soelaiman  
5. Sofyan Usman  
6. Sugiono Pandy San  
7. Soesamto  
8. Ir. Purwono Widodo  
9. Hardiman Utomo  
10. Justian Suhandinata  
11. Ario Noegroho Setiantoro  
12. Sindu Prawira  
13. H. Rudy Syafruddin Syamsuddin  
14. Agus Salim  
15. Wong Tommy Wijaya  
16. Ismail Mandry  
17. Putu Sri Sundari Inten  
18. Ahmad Banani

Langkah berikutnya IISIA menyelenggarakan Musyawarah Nasional Indonesia Iron & Steel Industry Association untuk kali pertama [MUNAS-I], pada tanggal 12 Desember 2013 di Grand Ballroom Hotel Gran Melia - Jakarta, yang intinya untuk mengesahkan maksud dan tujuan IISIA

contained in Vision and Mission. The Agenda Content Consist of below Details:

yang tertera didalam Visi dan Misi. Adapun isi dari Visi dan Misi IISIA adalah :

## Vision

- To Become a respected, competence and credible association of Indonesian steel iron industry
- To Contribute in the development of a competitive and environmentally friendly Indonesian iron and steel industry

## Mission

- To serve as the voice of Indonesian iron and steel industry in the public policy field.
- To Facilitate cooperation among members and other stakeholders
- To promote both domestic and international trade of steel and steel -related products.

## Categories of Members

### 1. Regular Member

Companies Involved in the production of iron and steel products or steel downstream processors in Indonesia

### 2. Special Members

Companies or individuals interested in Indonesian iron and steel industry

### 3. Honorary Member

Individuals with extraordinary contribution to the funding, developing, and managing the Association.

## Member Rights and responsibilities

- Members can be individuals or companies Involved in iron and steel industry in Indonesia
- All regular members have equal voting power
- Members must abide by the institute's regulations Including the memorandum and articles of Association.

Following the National Conference-I, IISIA prepare the future work program to achieve its goals and objectives. IISIA main program for the period 2013 - 2035 [Long Term Plan] is as follows:

Sebagai tindakanjuit dari MUNAS-I, IISIA menyiapkan program kerja kedepan untuk mencapai maksud dan tujuan tersebut. Program utama IISIA untuk kurun waktu 2013 - 2035 [Jangka Panjang] adalah sebagai berikut:

### I. Security Program for National Iron and Steel Industry (2014 - 2017)

1. Increased supply and national steel industry's capacity utilization.
2. Increasing the competitiveness of the national steel industry
3. Togetherness member / member IISIA consolidation.

### I. Program Pengamanan Industri Besi Baja Nasional (2014 - 2017)

1. Peningkatan pasokan dan utilisasi kapasitas industri baja nasional.
2. Peningkatan daya saing industri besi baja nasional
3. Kebersamaan anggota/ konsolidasi anggota IISIA.

### II. Strengthening Program for National Iron and Steel Industry (2015 - 2025)

1. Filing road map national steel industry
2. Proposing Investment Criteria
3. Increased national steel capacity reached 25 million tons

### II. Program Penguatan Industri Besi Baja Nasional (2015 - 2025)

1. Pengajuan road map industri besi baja Nasional
2. Pengusulan Kreteria Investasi
3. Peningkatan kapasitas besi baja nasional mencapai 25 juta ton

### III. National Steel Industry Development Program (2020 - 2035)

National steel capacity reached 50 million tons.

IISIA existence as the only steel association representing Indonesia in regional and international activities, which also became the government's main partners, has a key strategic role in supporting the government to play its role in defending the interests of the development of the national steel industry. Many of the IISIA work programs are related to government work programs as regulators, especially those related to market regulation and the national steel industry, therefore the results obtained are highly dependent on the speed of the government's work system in making decisions. IISIA and the government are still working on making the regulations that have been issued can be more effective in their implementation and continue to encourage the government to immediately follow up on regulations that are still in the process of being resolved.

As part of ASEAN, IISIA also an integral part of AISC [ASEAN Iron and Steel Council] and a member SEAISI [South East Asia Iron and Steel Institute]. Within the scope of the regional and international IISIA has conducted various activities, whether conducted on a regular basis such as AISC meeting / SEAISI performed each year with place alternately from ASEAN member countries, as well as other regular meetings.

It can be conclude of the above IISIA Task illustrates that IISIA role in defending the interests of the development of the greater national steel industry, it is felt from IISIA program in partnership with governments, which issued more policies aimed at the development of the national steel industry. When viewed from the side IISIA organization, number of members continues to increase where at the age of barely 10 [ten] years has reached 193 iron and steel.

Towards ten years formed, IISIA has several times makes the reshuffle of The Chairman, where in the period [2008 - 2017] there were four replacements, but in the replacement of the Chairman did not change the composition of other IISIA managers. The Executive Directors and Directors of IISIA in the period 2013 - 2019 are as follows:

| No. | Chairman of IISIA | Executive Director  |
|-----|-------------------|---------------------|
| 1.  | Fazwar Bujang     | Edward Pinem        |
| 2.  | Irvan Kamal Hakim | Hidajat Tri Seputro |
| 3.  | Sukandar          | Hidajat Tri Seputro |
| 4.  | Mas Wigrantoro    | Hidajat Tri Seputro |
| 5.  | Silmy Karim       | Yerry Idroes        |

### III. Program Pengembangan Industri Baja Nasional (2020 - 2035)

Kapasitas besi baja nasional mencapai 50 juta ton.

Keberadaan IISIA sebagai satu satunya asosiasi baja yang mewakili Indonesia dalam kegiatan regional dan internasional, yang sekaligus menjadi mitra utama pemerintah, memiliki peran kunci yang sangat strategis dalam mendukung pemerintah untuk memainkan perannya dalam membela kepentingan perkembangan industri baja nasional. Banyak program kerja IISIA yang berhubungan erat dengan pemerintah dan jajarannya sebagai pembuat regulasi, terutama yang berkaitan dengan regulasi pasar dan industri baja nasional, oleh karenanya hasil yang diperoleh sangat tergantung pada kecepatan birokrasi pemerintah dalam membuat keputusan. IISIA bersama pemerintah masih terus berupaya agar regulasi yang telah dikeluarkan dapat lebih efektif dalam implementasinya dan terus mendorong pemerintah untuk segera menindaklanjuti regulasi yang masih dalam proses penyelesaian.

Sebagai bagian dari ASEAN, IISIA juga merupakan bagian yang tidak terpisahkan dari AISC [ASEAN Iron and Steel Council] dan sekaligus menjadi anggota SEAISI [South East Asia Iron and Steel Institute]. Dalam lingkup regional dan internasional IISIA telah melakukan berbagai kegiatan, baik yang dilakukan secara regular seperti pertemuan AISC/SEAISI yang dilakukan setiap tahun dengan tempat bergantian dari Negara anggota ASEAN, maupun pertemuan rutin lainnya.

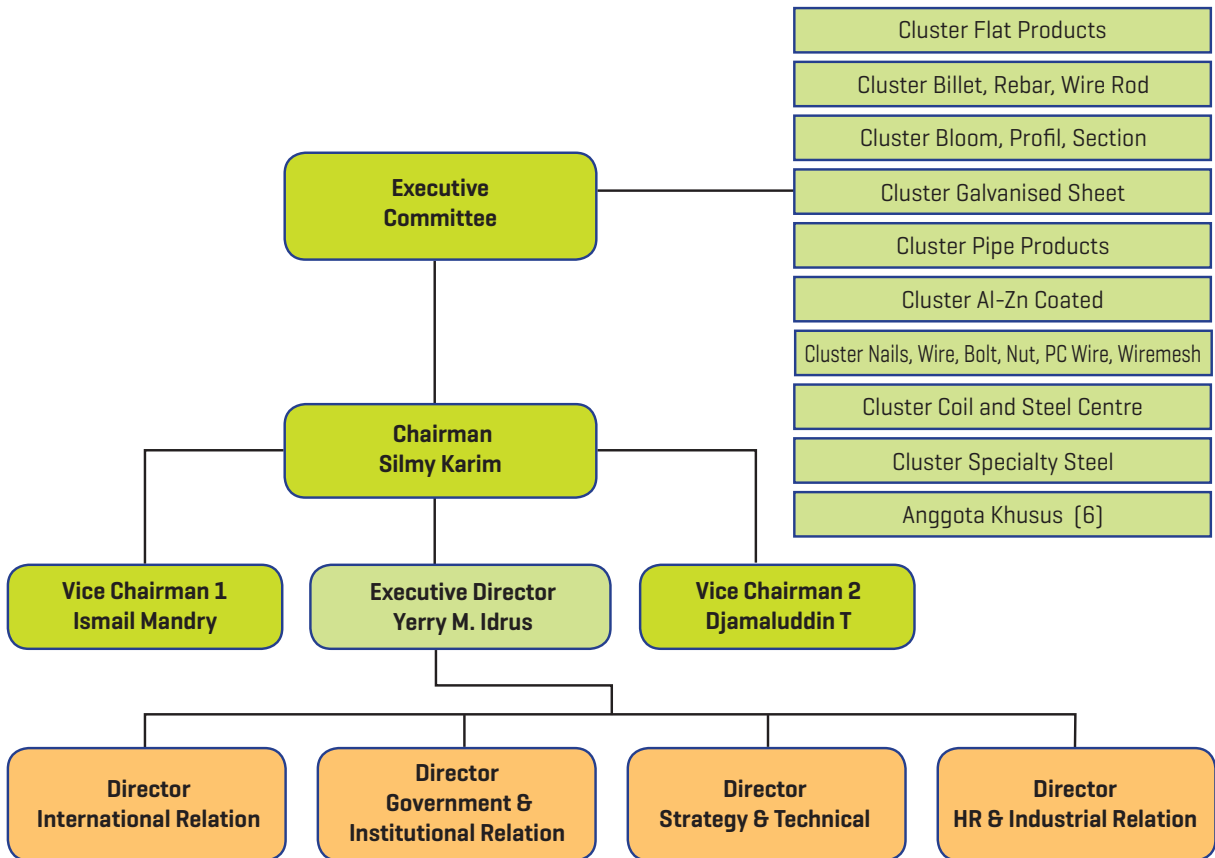
Ilustrasi dari tugas IISIA diatas memberikan gambaran bahwa peran IISIA dalam membela kepentingan perkembangan industri baja nasional semakin besar, hal ini dirasakan dari program IISIA sebagai mitra pemerintah, dimana kebijakan yang dikeluarkan lebih ditujukan untuk perkembangan industri baja nasional. Apabila dilihat dari sisi organisasi IISIA, jumlah anggota terus meningkat dimana pada usia yang baru menginjak 10 [sepuluh] tahun sudah mencapai 193 perusahaan besi dan baja.

Didalam perjalanan menuju usia 10 [sepuluh] tahun, IISIA mengalami beberapa kali penggantian pucuk pimpinan [Chairman], dimana pada periode [2008 - 2017] terjadi 4 [empat] kali penggantian, namun dalam penggantian pimpinan tersebut tidak merubah susunan pengurus IISIA lainnya. Adapun Pimpinan dan Direktur Executive IISIA pada periode 2013 - 2019 sebagai berikut:

| No. | Chairman of IISIA | Executive Director  |
|-----|-------------------|---------------------|
| 1.  | Fazwar Bujang     | Edward Pinem        |
| 2.  | Irvan Kamal Hakim | Hidajat Tri Seputro |
| 3.  | Sukandar          | Hidajat Tri Seputro |
| 4.  | Mas Wigrantoro    | Hidajat Tri Seputro |
| 5.  | Silmy Karim       | Yerry Idroes        |

The management structure and organizational structure of IISIA changed after the 2nd National Conference was held on November 15, 2017 at the Royal Kuningan Hotel - Jakarta, where in the second national Conference meeting for the organizational structure changed to be simpler, and there were no more than 3 [three] Co-Chairman [which consists of: Long Steel, Flat Steel and Profiles, Engineering & Fabricator] but changed to only two, namely as Vice Chairman 1 and Vice Chairman 2, with the following organizational structure period 2018 - 2022;

Susunan pengurus dan struktur organisasi IISIA berubah setelah dilakukannya MUNAS ke II yang diselenggarakan pada tanggal 15 November 2017 di Hotel Royal Kuningan - Jakarta, dimana dalam MUNAS ke II tersebut structure organisasi berubah menjadi lebih sederhana, dan tidak lagi ada 3 [tiga] Co-Chairman [yang terdiri dari : Long Steel, Flat Steel dan Profiles, Engineering & Fabricator] tetapi diganti menjadi hanya ada 2[dua] yaitu Vice Chairman 1 dan Vice Chairman 2, dengan susunan struktur Organisasi periode 2018 - 2022 sebagai berikut;



**CLUSTER : Executive Committee**

|   |                 |
|---|-----------------|
| Cluster Flat Products                             | Purwono Widodo  |
| Cluster Billet, Rebar, Wire Rod                   | Ismail Mandry   |
| Cluster Bloom, Profil, Section                    | Ken Pangestu    |
| Cluster Galvanised Sheet                          | Lenny           |
| Cluster Pipe Products                             | Hardiman        |
| Cluster Al-Zn Coated                              | Henry Setiawan  |
| Cluster Nails, Wire, Bolt, Nut, PC Wire, Wiremesh | Ario S          |
| Cluster Coil and Steel Centre                     | Dwi Ratna Limin |
| Cluster Specialty Steel                           | Madhur          |

**SPECIAL MEMBERS / ANGGOTA KHUSUS :**

|                            |                               |
|----------------------------|-------------------------------|
| <b>PT. KRAKATAU STEEL</b>  | <b>Silmy Karim</b>            |
| <b>PT. GUNUNG GARUDA</b>   | <b>Djamaluddin Tanoto</b>     |
| <b>PT. KRAKATAU POSCO</b>  | <b>Cahyo Antarikso</b>        |
| <b>PT. ESSAR INDONESIA</b> | <b>Nugraha Soekma Widjaja</b> |
| <b>PT. ISPAT INDO</b>      | <b>BP Banka</b>               |

**Profesional Group**

|   |  |  |   |
|---|--|--|---|
| <p><b>Department of International Relations</b></p> <ul style="list-style-type: none"> <li>• International Relations Director</li> <li>• Head of International Relations Division</li> <li>• Head of Business Environment Regulation Division</li> </ul>  | <p><b>Department of Standard &amp; Technical Committee</b></p> <ul style="list-style-type: none"> <li>• Standard, Certification &amp; Law Enforcement Director</li> <li>• Long Steel Industry Relations Director</li> <li>• Head of Long Steel Industry Relations</li> <li>• Standard &amp; Certification Committee</li> </ul> | <p><b>Department of Government &amp; Institutional Relations</b></p> <ul style="list-style-type: none"> <li>• Government &amp; Institutional Relations Director</li> <li>• Head of Institutional Relation Division</li> <li>• Head of Government Relation Division</li> </ul>  |   |
| <p><b>Department of Strategic, Business Policy &amp; Technology</b></p> <ul style="list-style-type: none"> <li>• Strategic Development Technology Director</li> <li>• Head of Technology &amp; Development Division</li> <li>• Head of Raw Material &amp; Steel Process Technology Division</li> <li>• Strategic &amp; Technology Development Committee</li> <li>• Energy &amp; Green Industry Committee</li> </ul> | <p><b>Department of Steel Application &amp; Construction</b></p> <ul style="list-style-type: none"> <li>• Steel Application &amp; Construction Director /Executive Committee Member</li> </ul>   | <p><b>Department of Finance &amp; General Affair</b></p> <ul style="list-style-type: none"> <li>• Finance &amp; General Affair Director</li> <li>• Head of Human Capital &amp; Labour Union Relations Division</li> <li>• Labour Union Relations Officer</li> <li>• General Affair Officer</li> <li>• Legal Officer</li> </ul> | <p><b>Department of Database &amp; Member Relations</b></p> <ul style="list-style-type: none"> <li>• Database &amp; Member Relations Director</li> <li>• Head of Statistic Division</li> <li>• Database &amp; Membership Officer</li> </ul> |

| No.  | JABATAN   | NAMA PENGURUS             |
|--|---|---------------------------|
| 1  | <b>Chairman</b>   | <b>Silmy Karim</b>        |
| 2  | <b>Vice Chairman 1</b>  | <b>Ismail Mandry</b>      |
| 3  | <b>Vice Chairman 2</b>  | <b>Djamaluddin Tanoto</b> |
| 4  | <b>Executive Director</b>   | <b>Yerry Idroes</b>       |
| <b>Department of International Relations :</b>                     |   |                           |
| 5  | <i>International Relations Director/Executive Committee Member</i>              | Purwono Widodo            |
| 6  | <i>International Relations Director</i>   | Ardhiman                  |
| 7  | <i>Head of International Relations Division</i>                                 | Rhea Sianipar             |
| 8  | <i>Head of Business Environment Regulation Division</i>                         | Lucia Karina              |
| <b>Department of Standard &amp; Technical Committee :</b>          |   |                           |
| 9  | <i>Standard, Certification &amp; Law Enforcement Director</i>                   | Basso Datu Makahanap      |
| 10   | <i>Long Steel Industry Relations Director</i>                                   | Sri Sundari               |
| 11   | <i>Head of Long Steel Industry Relations Division</i>                           | Handy Martinus            |
| 12   | <i>Standard &amp; Certification Committee</i>                                   | Budi Sumiyarto            |
| <b>Department of Government &amp; Institutional Relation :</b>     |   |                           |
| 13   | <i>Government &amp; Institutional Relations Director</i>                        | Edward Pinem              |
| 14   | <i>Head of Institutional Relations Division</i>                                 | Ketut Setiawan            |
| 15   | <i>Head of Government Relation Division</i>                                     | R. Atok Hendrayanto       |
| <b>Department of Strategic, Business Policy &amp; Technology :</b> |   |                           |
| 16   | <i>Strategic Development &amp; Technology Director</i>                          | Setiawan Surakusumah      |
| 17   | <i>Head of Technology &amp; Development Division</i>                            | Hilman Hasyim             |
| 18   | <i>Head of Raw Material &amp; Steel Process Technology Division</i>             | Koesnohadi                |
| 19   | <i>Strategic &amp; Technology Development Committee</i>                         | Iskandar I. Daulay        |
| 20   | <i>Strategic &amp; Technology Development Committee</i>                         | Arief Purnomo             |
| 21   | <i>Energy &amp; Green Industry Committee</i>                                    | Zaenal Muslim             |
| <b>Department of Steel Application &amp; Construction :</b>        |   |                           |
| 22   | <i>Steel Application &amp; Construction Director/Executive Committee Member</i> | Ken Pangestu              |
| 23   | <i>Head of Steel Application &amp; Construction Division</i>                    | Donald Febriansyah        |
| <b>Department of Finance &amp; General Affair :</b>                |   |                           |
| 24   | <i>Finance &amp; General Affair Director</i>                                    | Erwin                     |
| 25   | <i>Head of Human Capital &amp; Labour Union Relations Division</i>              | Andhi Purnomo             |
| 26   | <i>Labour Union Relations Officer</i>   | Mega Purnami              |
| 27   | <i>General Affair Officer</i>   | Ratna Dewi                |
| 28   | <i>Legal Officer</i>  | Novita Yusniaty           |
| <b>Department of Database &amp; Members Relation :</b>             |   |                           |
| 29   | <i>Database &amp; Member Relations Director</i>                                 | Titi Marga                |
| 30   | <i>Head of Statistic Division</i>   | Tuti Rachmawati           |
| 31   | <i>Database &amp; Membership Officer</i>  | Roy Bogar                 |
| <b>Secretariat :</b>   |   |                           |
| 32   | <i>Finance &amp; Accounting Officer</i>   | Rizka Prilia              |
| 33   | <i>Secretary &amp; Member Administration</i>                                    | Ervy Damayanti            |
| 32   | <i>Administration Officer</i>   | Saliman                   |



*This directory book 2019 - 2020 or 4th [fourth] edition is published in commemoration of the 10th anniversary of IISIA, with the theme "Increasing the Contribution of the Steel Industry in Supporting National Infrastructure Development and the National Manufacturing Industry". The intent and purpose of the theme is to show the level of supply ability of national steel producers and the quality of national steel products as indicated by technology indicators and production capacity in an effort to improve the alignment of the national steel industry development with the needs of steel products for the construction and manufacturing sectors, so this directory book will be able to provide a general picture of the development of World iron and steel consumption, ASEAN, especially in Indonesia and also about the profile of the steel industry and the projection of national steel consumption until 2020.*

*It is hoped that the Directory will be informative and comprehensive for all users and stakeholders in order to support the development of infrastructure and manufacturing industry in the country.*

Buku direktori 2019 - 2020 atau edisi ke 4 [empat] ini diterbitkan dalam rangka memperingati ulang tahun IISIA yang ke 10 tahun, dengan tema "**Peningkatan Kontribusi Industri Baja dalam Mendukung Pembangunan Infra Struktur dan Industri Manufaktur Nasional**". Adapun maksud dan tujuan dari tema tersebut untuk menunjukkan tingkat kemampuan pasokan produsen baja nasional serta kualitas produk baja nasional yang ditunjukkan dengan indikator teknologi dan kapasitas produksinya dalam upaya meningkatkan keselarasan pengembangan industri baja nasional dengan kebutuhan produk baja untuk sektor konstruksi dan manufaktur, sehingga buku direktori ini akan dapat memberikan gambaran secara umum mengenai perkembangan konsumsi besi dan baja Dunia, ASEAN, khususnya di Indonesia dan juga mengenai profil industri baja serta proyeksi konsumsi baja nasional sampai dengan tahun 2020.

Dengan demikian diharapkan buku ini akan bersifat informatif dan komprehensif bagi seluruh pengguna maupun pemangku kepentingan [Stakeholder] dalam upaya mendukung pembangunan infra struktur dan Industri manufaktur didalam negeri.

### III. DEVELOPMENTS of NATIONAL STEEL INDUSTRY

#### 1. World Steel Industry Overview

In some countries, the role of the iron and steel industry is very high, as well as supporting the development of the construction sektor as well as a base in the development of manufacturing industry. As the industrial base, the steel industry has a pretty big role in which almost all of the products such as ships, trains, automobiles that using steel. Besides steel products are also used in petroleum drilling, construction of bridges, roads, factories, offices, and other public facilities, therefore it is often said that the steel as the "Mother of Industry". Even further said that steel consumption of a country is one indicator of the progress of the State, since the presence of iron and steel industry in a country will reflect the strength of the nation.

Below Graphic is an overview development Production of Crude Steel [Steel Coarse] and Apparent Steel Use [ASU] or Use of Crude Steel in the world [Crude Steel equivalent] of the world, during the period of the last 8 years since 2010 to 2017 [Source: various sources are processed ], which will be able to provide proof of the above-mentioned statement that the country with crude steel production of over 10 million tons / year, generally classified as developed countries. Crude steel is semi-finished steel products [including: Billets, Blooms and Slabs] which is the raw material of steel products, which is included in the upstream steel industry group.

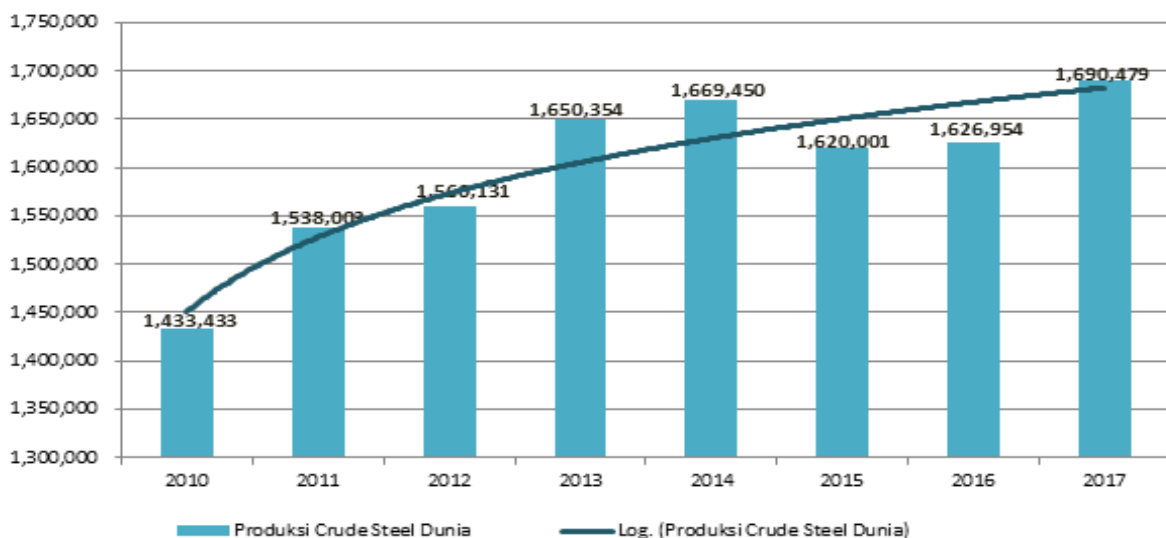
### III. PERKEMBANGAN INDUSTRI BESI BAJA NASIONAL

#### 1. Gambaran Umum Industri Baja Dunia

Didalam suatu Negara, peran Industri besi dan baja sangatlah besar, baik sebagai penunjang pembangunan sektor konstruksi maupun sebagai basis dalam pengembangan industri manufaktur. Sebagai basis industri, industri baja mempunyai peran yang besar dimana hampir semua produk seperti kapal laut, kereta api, mobil menggunakan baja. Selain itu produk baja juga dipakai dalam pengeboran minyak bumi, pembangunan jembatan, jalan, pabrik, perkantoran, serta fasilitas umum lainnya, oleh karena itu seringkali dikatakan bahwa baja sebagai "Mother of Industry". Bahkan lebih jauh lagi dikatakan bahwa konsumsi baja suatu Negara merupakan salah satu indikator kemajuan Negara, karena itu keberadaan industry besi dan baja dalam suatu Negara akan mencerminkan kekuatan dari bangsa tersebut. Pada umumnya Negara yang memiliki industri baja yang besar dan maju, tergolong sebagai kelompok Negara maju .

Dibawah ini gambaran perkembangan Produksi Crude Steel [Baja Kasar] dan Apparent Steel Use [ASU] atau Penggunaan Crude Steel di Dalam Negeri [Crude Steel equivalent] dunia, selama kurun waktu 8 tahun terakhir sejak tahun 2010 - 2017 [Sumber: berbagai sumber yang diolah], yang akan dapat memberikan bukti dari pernyataan tersebut diatas bahwa Negara dengan hasil produksi *crude steel* diatas 10 juta Ton/tahun, umumnya tergolong negara maju. *Crude steel* adalah produk baja setengah jadi [meliputi: *Billets*, *Blooms* dan *Slabs*] yang merupakan bahan baku dari produk baja, yang termasuk dalam kelompok industri baja hulu.

**World Crude Steel Production**



Source: Various sources that are processed.

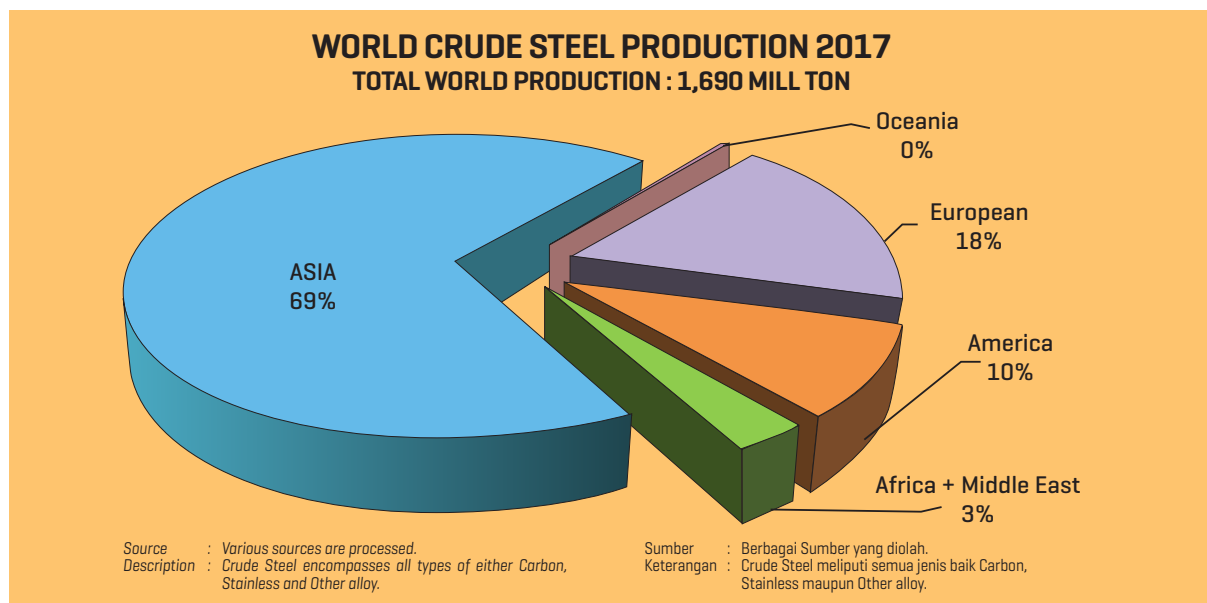
Description: Crude Steel encompasses all types of either Carbon, Stainless and Other alloy.

The world crude steel production since 2010 and 2017 seen gradually increasing along with the increase in world crude steel usage, although the amount of the increase annually looks slow, but it has been steadily increasing. Slowing growth of world crude steel production is because the global economy has not fully recovered from the financial crisis that hit the world since the year 2007-2008. But in the year 2017 crude steel production increased substantially, in line with the strengthening of the world economy which is shown by the increase in the manufacturing and trade sectors, as well as market confidence and commodity prices are more stable.

Produksi crude steel dunia sejak tahun 2010 hingga tahun 2017 terlihat secara perlahan – lahan terus meningkat seiring dengan peningkatan penggunaan crude steel dunia, meskipun jumlah peningkatan dari tahun ke tahun terlihat lambat, namun kecenderungannya terus meningkat. Melambatnya pertumbuhan produksi crude steel dunia antara lain karena perekonomian global yang belum sepenuhnya pulih dari krisis keuangan yang melanda dunia sejak tahun 2007-2008. Akan tetapi ditahun 2017 produksi crude steel meningkat cukup tinggi, sejalan dengan menguatnya perekonomian dunia yang ditunjukkan oleh meningkatnya sector manufaktur dan perdagangan, serta kepercayaan pasar dan harga komoditas yang semakin stabil .

The world crude steel production in the chart above is the production of various continents of the world within different numbers. The world crude steel producer is dominated by 3 [three] continents, there is Europe, America and Asia, while the rest is produced by Africa, the Middle East and Oceania. The largest in the continent produces crude steel is Asia with production reaching 69% of world crude steel. The world crude steel production figures generated by continent, as follows;

Produksi baja kasar dunia dalam grafik diatas merupakan produksi dari berbagai benua di dunia, yang jumlahnya berbeda-beda. Penghasil baja kasar dunia didominasi oleh 3 [tiga] benua yaitu Eropa, America dan Asia, sedangkan sisanya dihasilkan oleh Africa, Middle East dan Oceania. Benua yang terbesar dalam menghasilkan baja kasar adalah Asia dengan produksi mencapai 69% dari baja kasar dunia. Gambaran produksi baja kasar dunia yang dihasilkan menurut benua, sebagai berikut;



The graph above clearly shows that the world crude steel producer controlled by only three major continents, which is Europe, America and Asia, although almost all the continents produce crude steel but not as big as the amount generated by the above-mentioned three continents. The crude steel from every continent is the sum of crude steel produced by a few countries that are in the continent, but it does not mean that all the countries who are the continent can produce crude steel, because there are some countries have not been able to produce crude steel.

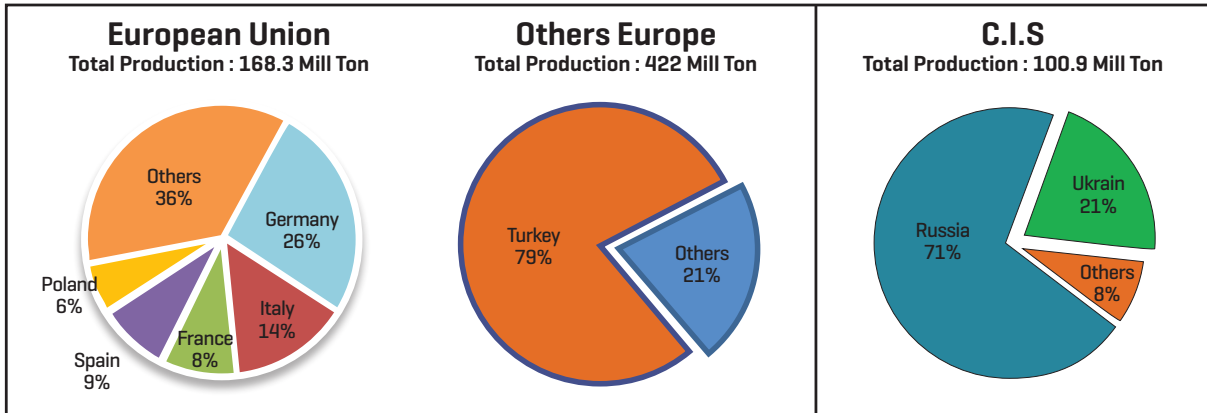
Grafik diatas jelas terlihat bahwa penghasil baja kasar dunia hanya dikuasai oleh 3 [tiga] benua besar saja, yaitu Eropa, America dan Asia, meskipun hampir semua benua menghasilkan baja kasar tetapi tidak sebesar jumlah yang dihasilkan oleh ke tiga benua tersebut diatas. Hasil baja kasar dari setiap benua merupakan penjumlahan dari baja kasar yang dihasilkan oleh beberapa Negara yang ada didalam benua tersebut, tetapi bukan berarti semua Negara yang berada dibenua tersebut dapat menghasilkan baja kasar, karena ada pula beberapa Negara belum dapat memproduksi baja kasar.

The graph below is a crude steel production output several continents outlined by the State in 2017 which will give you an idea that the country has a large steel industry that is classified as developed countries.

Grafik dibawah ini merupakan hasil produksi baja kasar beberapa benua yang dijabarkan menurut Negara pada tahun 2017 yang akan memberikan gambaran bahwa Negara yang memiliki industri baja yang besar pada umumnya tergolong Negara maju.

**1. Continental Europe:**

**1. Benua Eropa :**



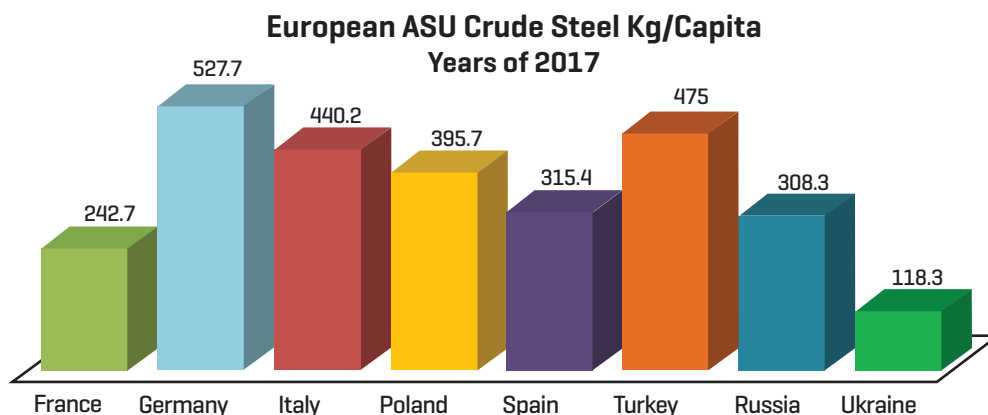
Source: various sources are processed

From the continent of the European Union there are five countries whose crude steel output reaches above ten million tons per year, namely Germany, Italy, France, Spain and Poland, while other European continents Turkey is the largest crude steel producer compared to countries that in other Europeans. From the total crude steel produced by the European continent, this does not include those produced by the Commonwealth of Independent State, better known as C.I.S. The crude steel producing countries of this group are Russia and Ukraine where in 2017 crude steel was produced as shown above. It turns out that the progress indicators of a country are not only visible from the development of the steel industry, but also reflected in the amount of steel consumption per capita measured by Apparent Steel Use [ASU Crude Steel / Capita].

Dari benua Uni Eropa ada 5 (lima) Negara yang hasil baja kasarnya mencapai diatas 10 (sepuluh) juta ton per tahunnya, yaitu Germany, Italy, France, Spain dan Poland, sedangkan benua Eropa lainnya negara Turkey merupakan penghasil baja kasar terbesar dibandingkan Negara yang ada pada Eropa lainnya. Dari total baja kasar yang dihasilkan benua Eropa tersebut belum termasuk yang dihasilkan oleh Negara Persemakmuran atau Commonwealth of Independent State yang lebih dikenal dengan C.I.S. Negara penghasil baja kasar dari group ini adalah Russia dan Ukraine dimana pada tahun 2017 baja kasar yang dihasilkan seperti pada gambar diatas. Ternyata indicator majunya suatu Negara tidak hanya terlihat dari perkembangan industri bajanya saja tetapi juga dicerminkan dari besaran konsumsi baja per capita nya yang diukur dari Apparent Steel Use [ASU Crude Steel/ Capita].

ASU features per Capita [Kg Crude Steel] in Europe as follows;

Gambaran ASU per Capita [Kg Crude Steel] di Eropa sebagai berikut;



Source: Various sources are processed

# NATIONAL STEEL INDUSTRY

## INDUSTRI BAJA NASIONAL

### GENERAL DESCRIPTION

*The iron and steel industries are included in sensitive industrial groups and are also very strategic. Said to be sensitive because a State will be easily dictated by the strength of other States if the State ignores the iron industry and steel. The steel industry is a strategic industry because it is a "Mother of Industry" that supports supply chains and value-added chains for the construction and manufacturing industries and other industries. Thus Indonesia is an industry that supports steel supply chains and value-added chains for the steel-based industry.*

*The illustration of the substantial role of steel industry as the driving force of the other industries, whether backward [inputting industry] and forward [steel product user industry] can be observed in the following illustration.*

*Moreover, it is said that the existence of iron and steel industry in a country is the reflection of the nation's power. As an illustration, Germany and Japan were capable to restore their iron and steel industry after suffering the world war, and so was China, South Korea and Taiwan, that the countries are now among the developed countries because their governments prioritize the development of their iron and steel industry. Therefore, steel industry shall be placed as vital industry, and therefore it is understandable if all countries, not excluding Indonesia, have to protect their iron and steel industries.*

### GAMBARAN UMUM

Industri besi dan baja termasuk dalam kelompok industri yang sensitif dan juga sangat strategis. Dikatakan sensitif karena suatu Negara akan mudah di dikte oleh kekuatan Negara lainnya apabila Negara tersebut mengabaikan industri besi dan bajanya. Industri baja merupakan industri strategis karena merupakan "Mother of Industry" yang mendukung rantai pasok dan rantai nilai tambah bagi industri konstruksi dan manufaktur serta industri lainnya. Dengan demikian Indonesia baja merupakan industri yang mendukung rantai pasokan dan rantai peningkatan nilai tambah industri berbasis baja.

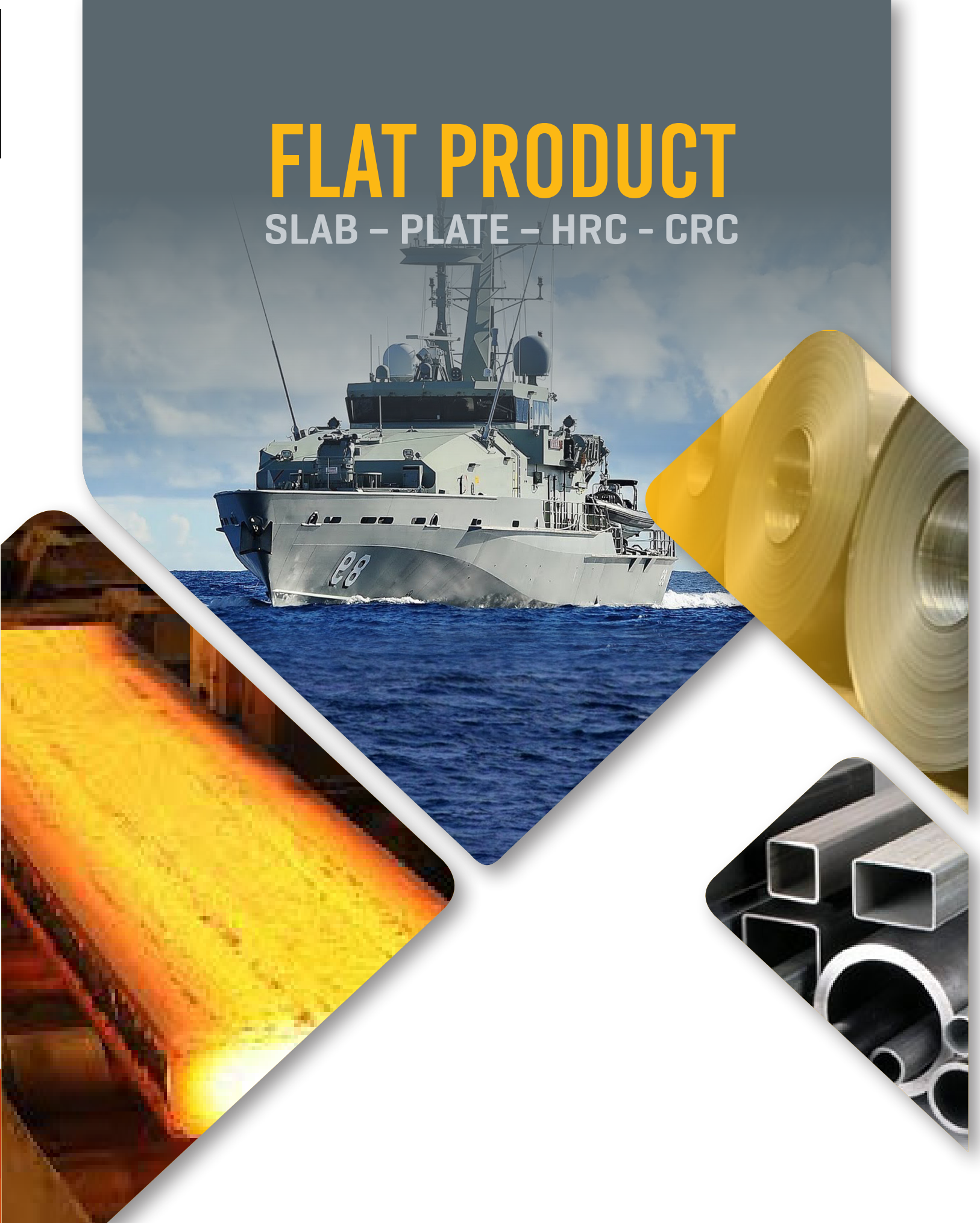
Ilustrasi dari besarnya peran industri baja sebagai penggerak industri lainnya, baik kebelakang [industri yang menjadi input] maupun kedepan [industri pengguna product baja], dapat terlihat pada gambar dibawah ini.

Lebih dari itu dikatakan bahwa keberadaan industri besi dan baja dalam suatu Negara merupakan cermin kekuatan dari bangsa tersebut. Sebagai gambaran, negara Jerman dan Japan segera memulihkan industri besi dan bajanya pasca mengalami perang dunia, begitu pula dengan china, Korea Selatan dan Taiwan sehingga negara-negara tersebut tergolong dalam kelompok negara maju karena pemerintahannya memprioritaskan pembangunan industri besi dan baja.



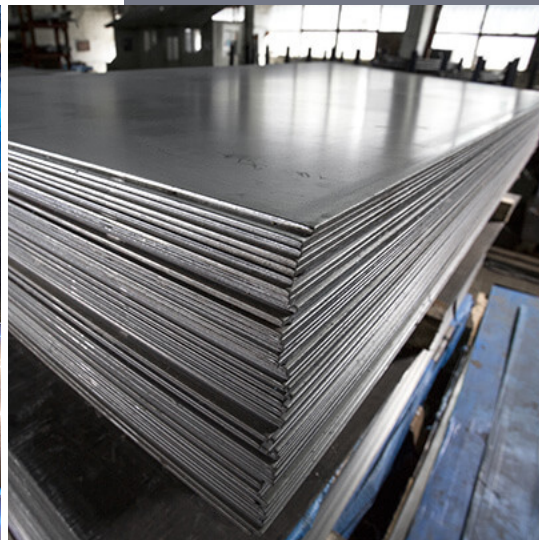
# FLAT PRODUCT

SLAB - PLATE - HRC - CRC



# FLAT PRODUCT COMPANY LIST

## SLAB – PLATE – HRC – CRC



### BASE ON CAPACITY

| COMPANY  | TECHNO PROCESS                                   | CAPACITY (TPY) | LOCATION                 |
|--|--|----------------|--------------------------|
| 1. PT KRAKATAU POSCO                             | BF-BOF-LF - CCM-PLATE MILL                       | 3,000,000      | CILEGON- BANTEN          |
| 2. PT KRAKATAU STEEL                             | BF, EAF-LF-CCM-HSM,CRM                           | 3,250,000      | CILEGON – BANTEN         |
| 3. PT GUNUNG RAJA PAKSI, TBK.<br>(GUNUNG GARUDA) | EAF, BF – BOF-LF-CCM-HSM,<br>ROLLING MILLS [CRC] | 1,600,000      | BEKASI- WEST JAVA        |
| 4. PT GUNAWAN DIAN JAYA STEEL                    | PLATE MILL                                       | 600.000        | SURABAYA-EAST JAVA       |
| 5. PT ESSAR INDONESIA                            | CRM  | 580,000        | BEKASI-WEST JAVA         |
| 6. PT JAVA PACIFIC                               | ROLLING MILLS [HRC]                              | 480,000        | SIDOARJO, EAST JAVA      |
| 7. RAJA BESI                                     | ROLLING MILLS [CRC]                              | 100,000        | SEMARANG-CENTRAL<br>JAVA |

