

Kajian Tengah Tahun (KTT) 2023

# Krisis Iklim, De-Industrialisasi & Prospek Ekonomi 2023

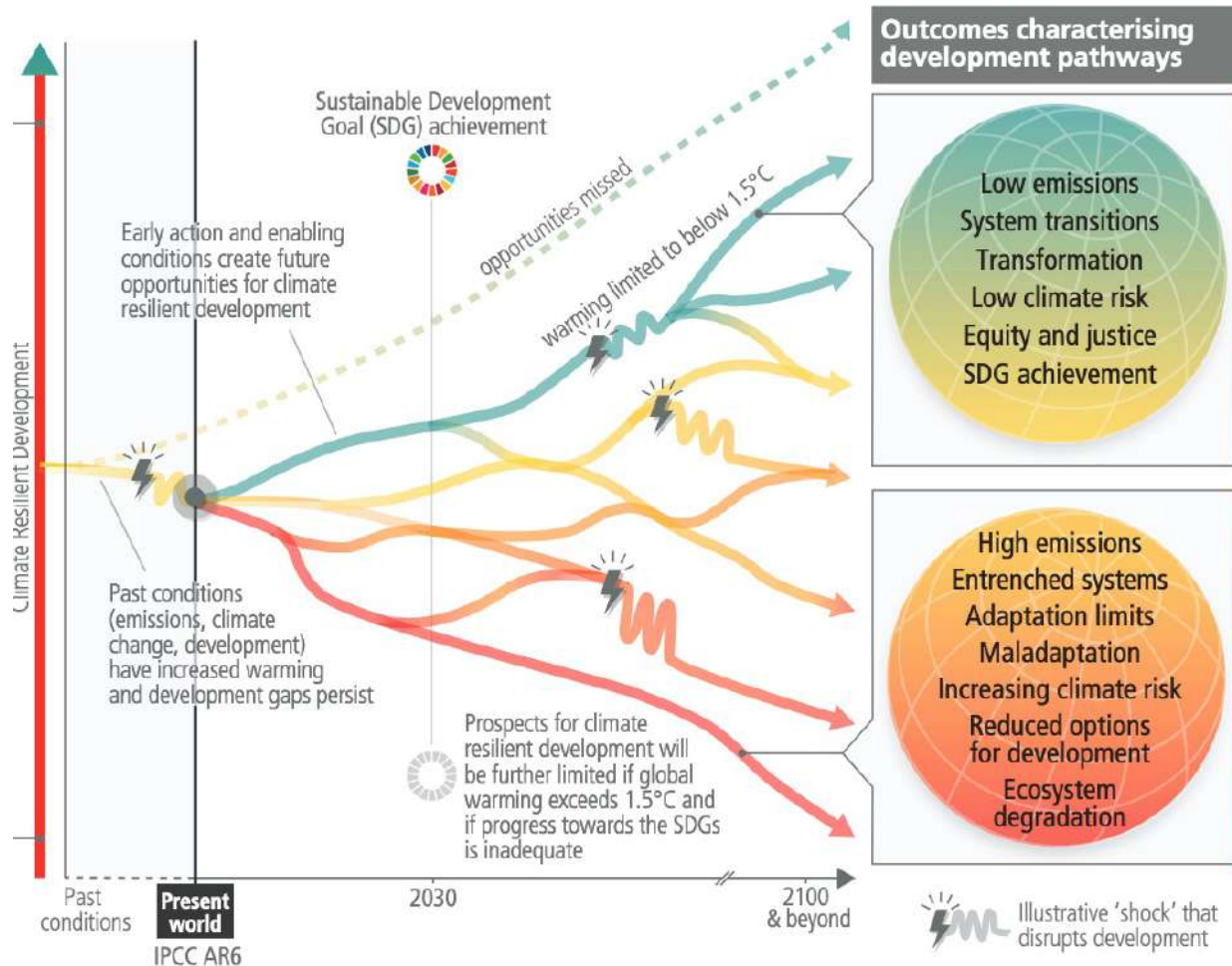
Berly Martawardaya  
Direktur Riset  
The Institute for Development of Economics and Finance (INDEF)

8 Agustus 2023



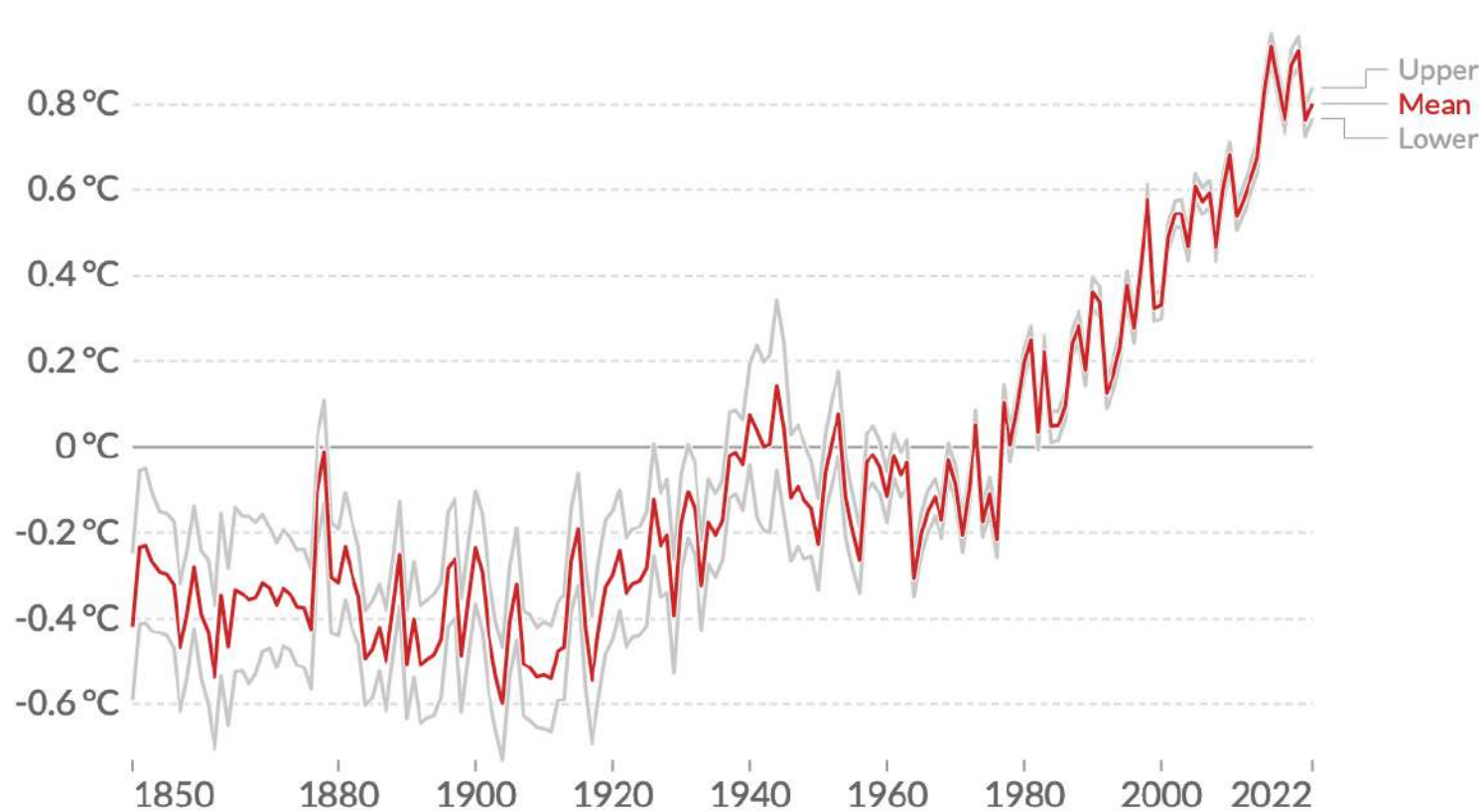
***INDEF***

# IPCC 2023 Report: Humanity Missed Opportunity of <1.5 degree Celcius



Sumber: IPCC (2023)

# Rerata Temperatur Dunia naik 0,8 derajat C sejak 1980 & 1,2 derajat sejak 1880



Source: Met Office Hadley Centre (HadCRUT5)

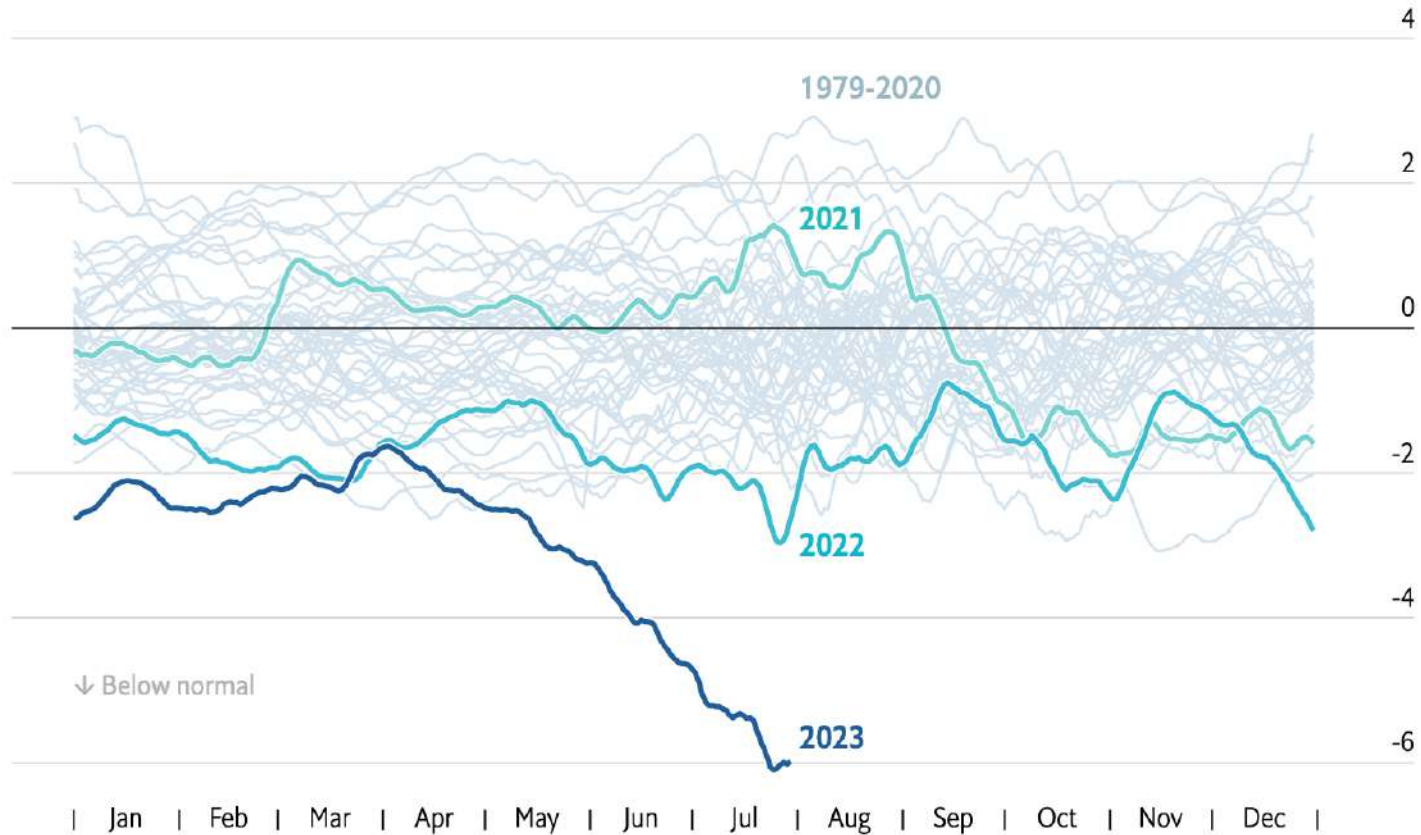
Note: The gray lines represent the upper and lower bounds of the 95% confidence intervals.

OurWorldInData.org/co2-and-greenhouse-gas-emissions • CC BY

# Es di Antartika Mencair Makin Cepat

## Antarctic sea-ice extent, standard deviations relative to 1991-2020\*

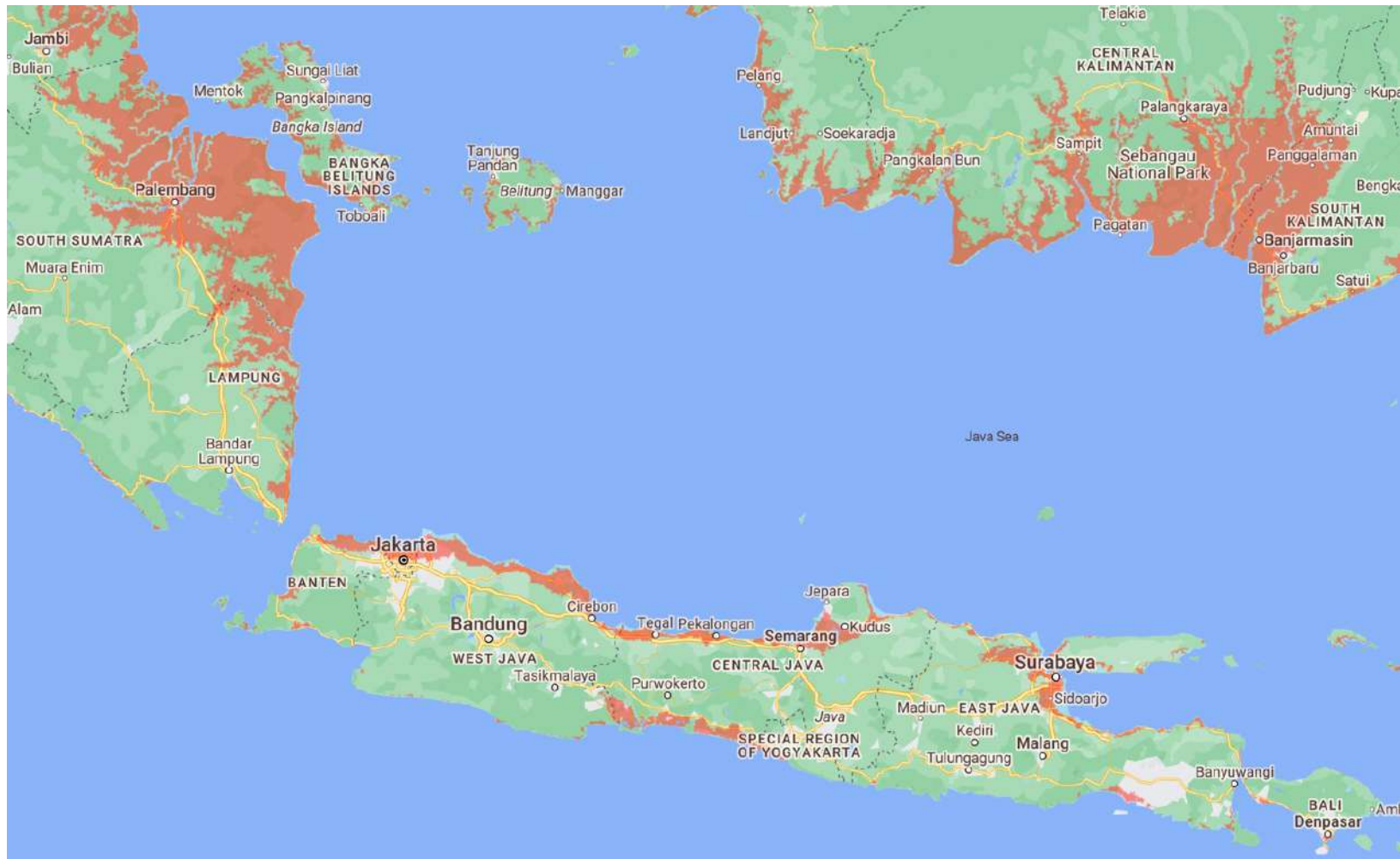
Five-day moving average



\*Each day is compared with the standard deviation of historical values for that day of the year

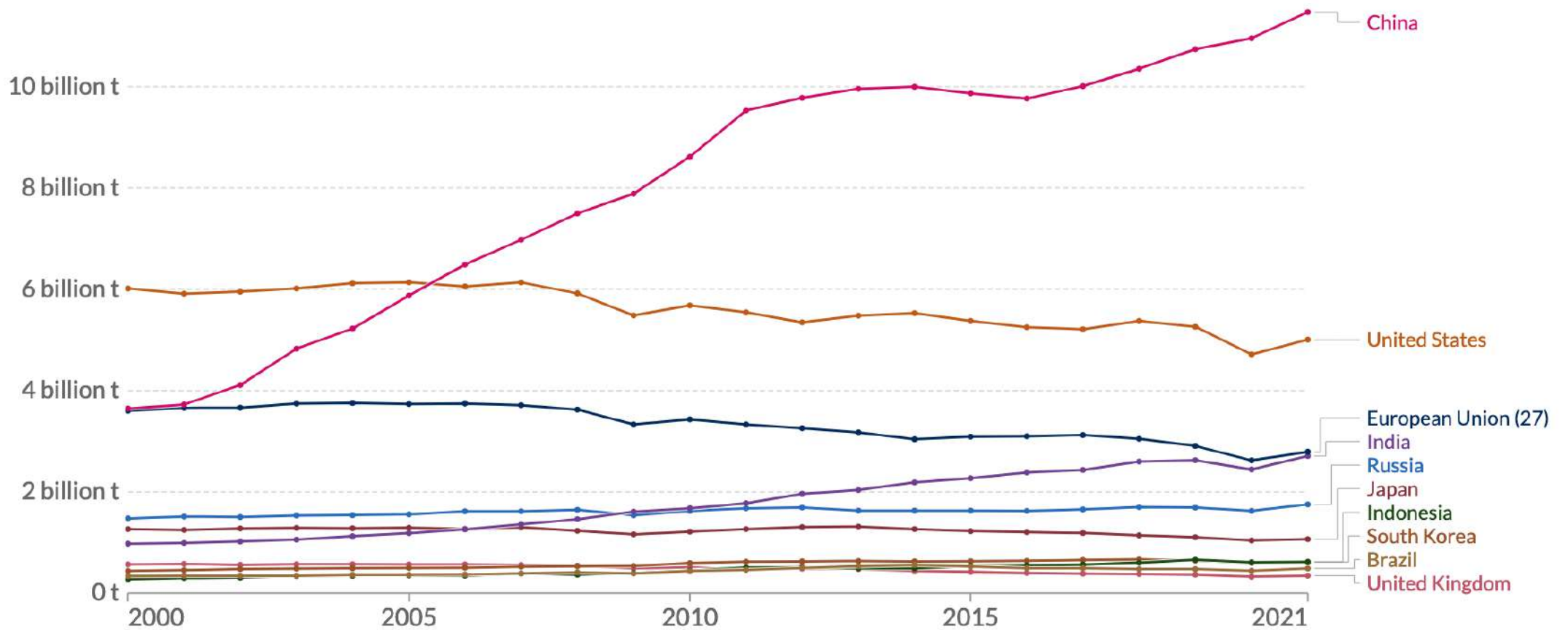


# Ketika Air Laut Naik 7 Meter



Sumber: noaa.gov

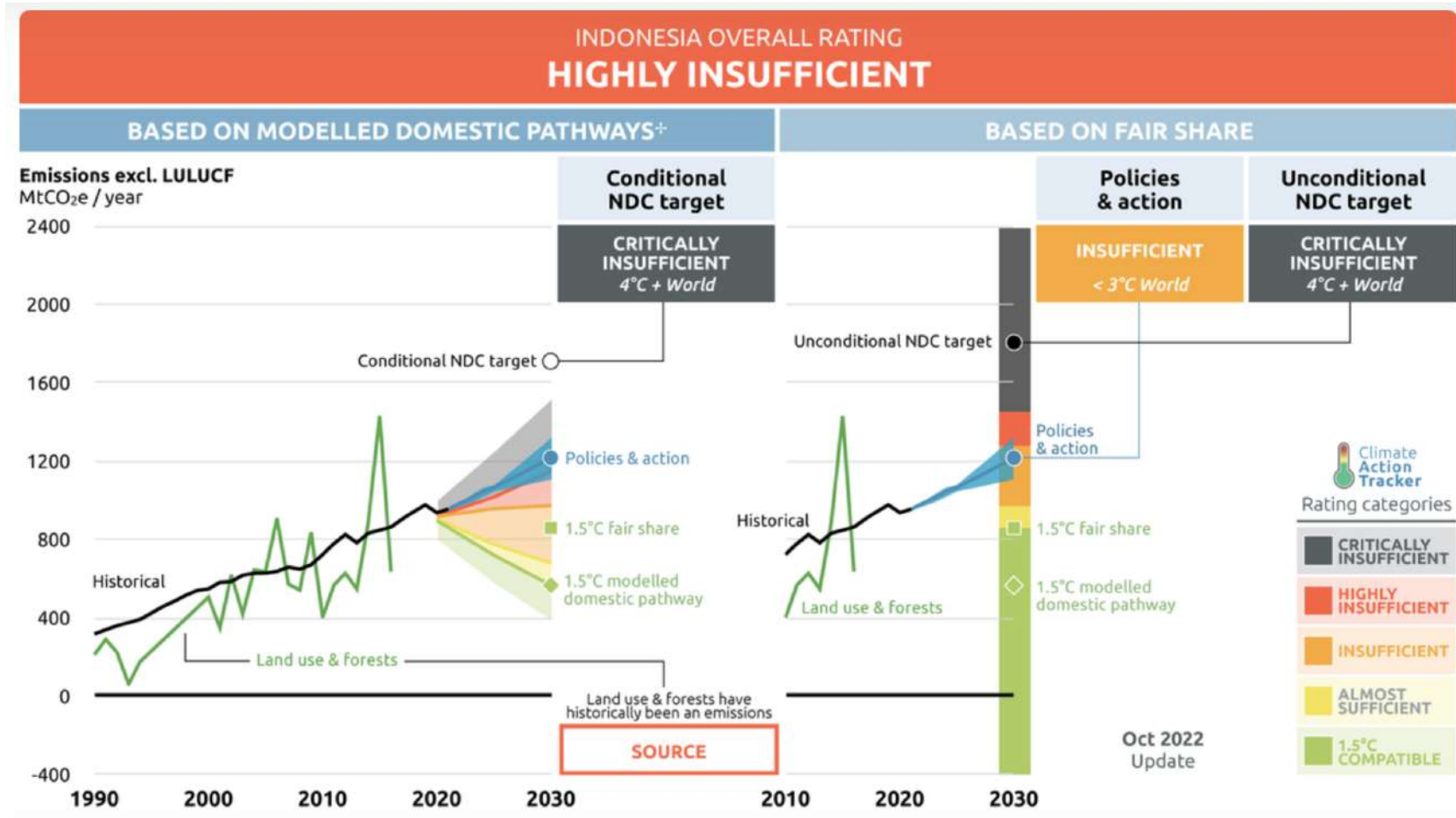
# Indonesia Emiter Karbon #7 di tahun 2021



Source: Global Carbon Budget (2022)

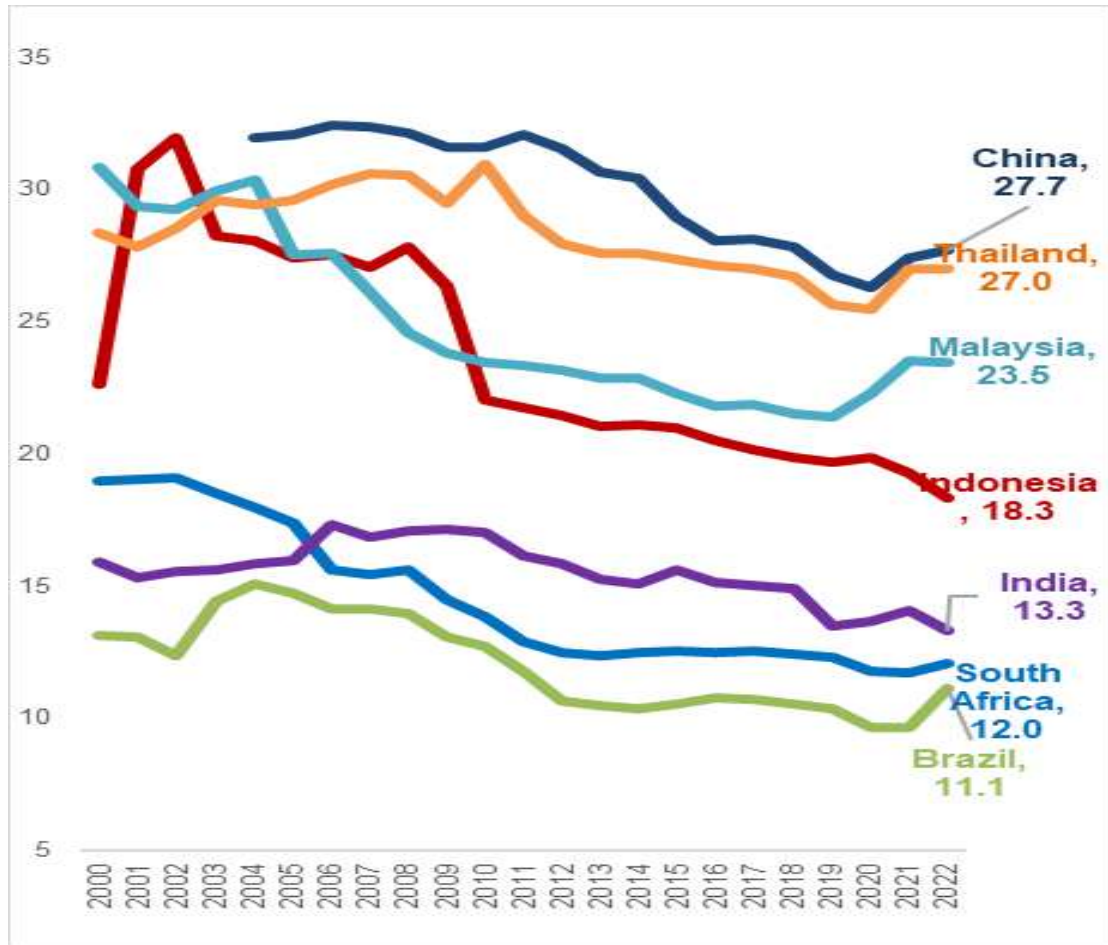
OurWorldInData.org/co2-and-greenhouse-gas-emissions • CC BY

# Kontribusi Iklim Indonesia masih tidak memadai



Sumber:  
Climate Action Tracker  
(2022)

## Pandemi Akselerasi De-Industrialisasi di Indonesia (Q2-2023: 18,25 %)



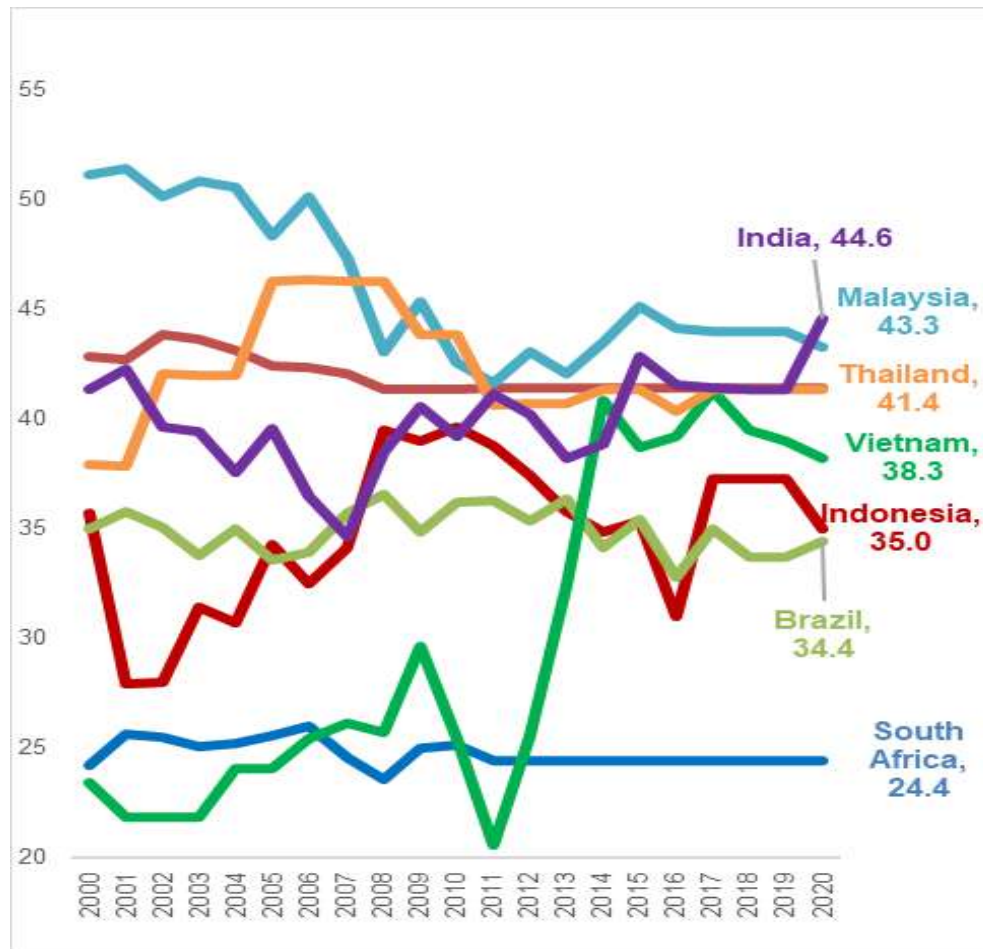
Sumber: BPS dan World Bank

### Manfaat sektor manufaktur:

- Serap naker berpendidikan menengah
- Kepastian pendapatan > UMR
- Social protection system
- Akumulasi Skill/Keahlian

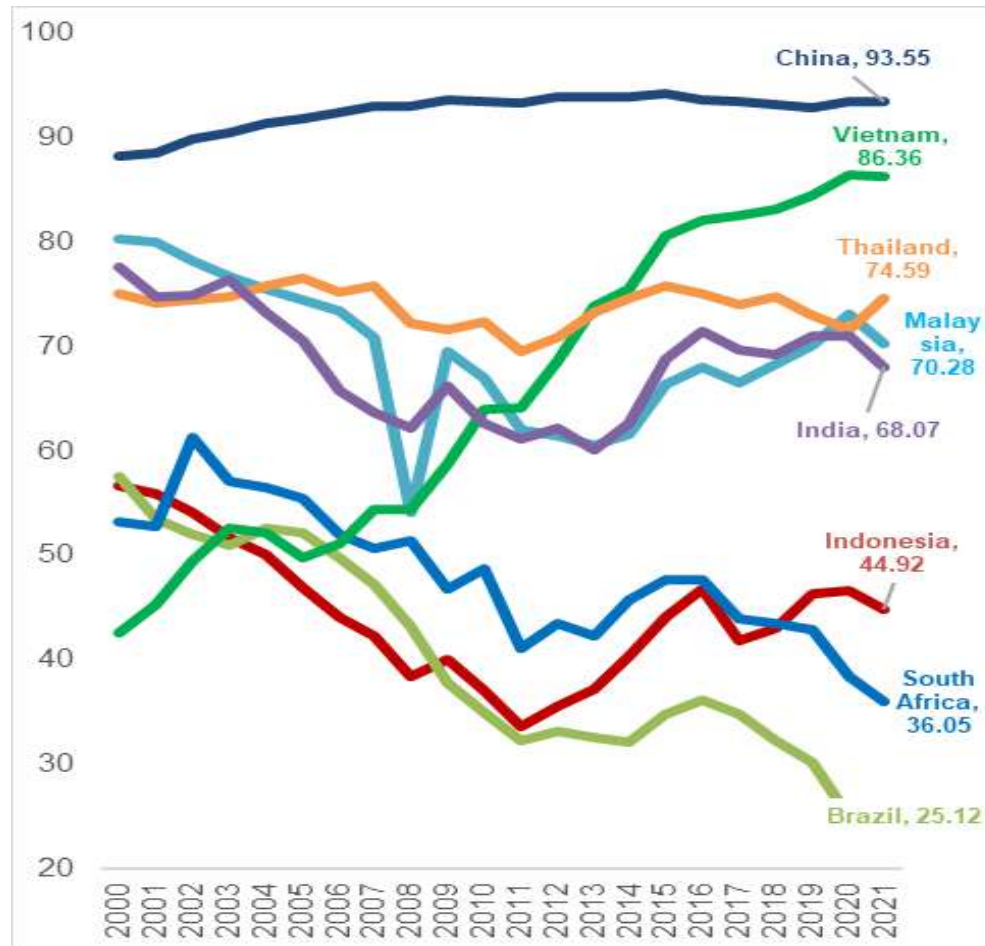


# Papan Tengah di Kandungan Teknologi Menengah- Tinggi di Manufaktur



Sumber: BPS dan World Bank

# Indonesia Papan Bawah di Kontribusi Manufaktur di Ekspor



Sumber: World Bank

## Sektor Manufaktur dan Presiden

<b>Masa Kepemimpinan</b>	<b>Periodisasi</b>	<b>Rata-rata Investasi Langsung Industri Pengolahan (Juta US\$)</b>	<b>Pertumbuhan PDB Industri Pengolahan Non-Migas (%)</b>	<b>Ekspor Industri Pengolahan (% Ekspor Barang)</b>
Susilo Bambang Yudhoyono	2004-2009	2,652.80	5.10	43.70
	2009-2014	7,625.20	6.10	36.80
Joko Widodo	2014-2019	8,420.10	4.70	44.40
	2019-2024*	7,426.10	2.10	45.80

Sumber:

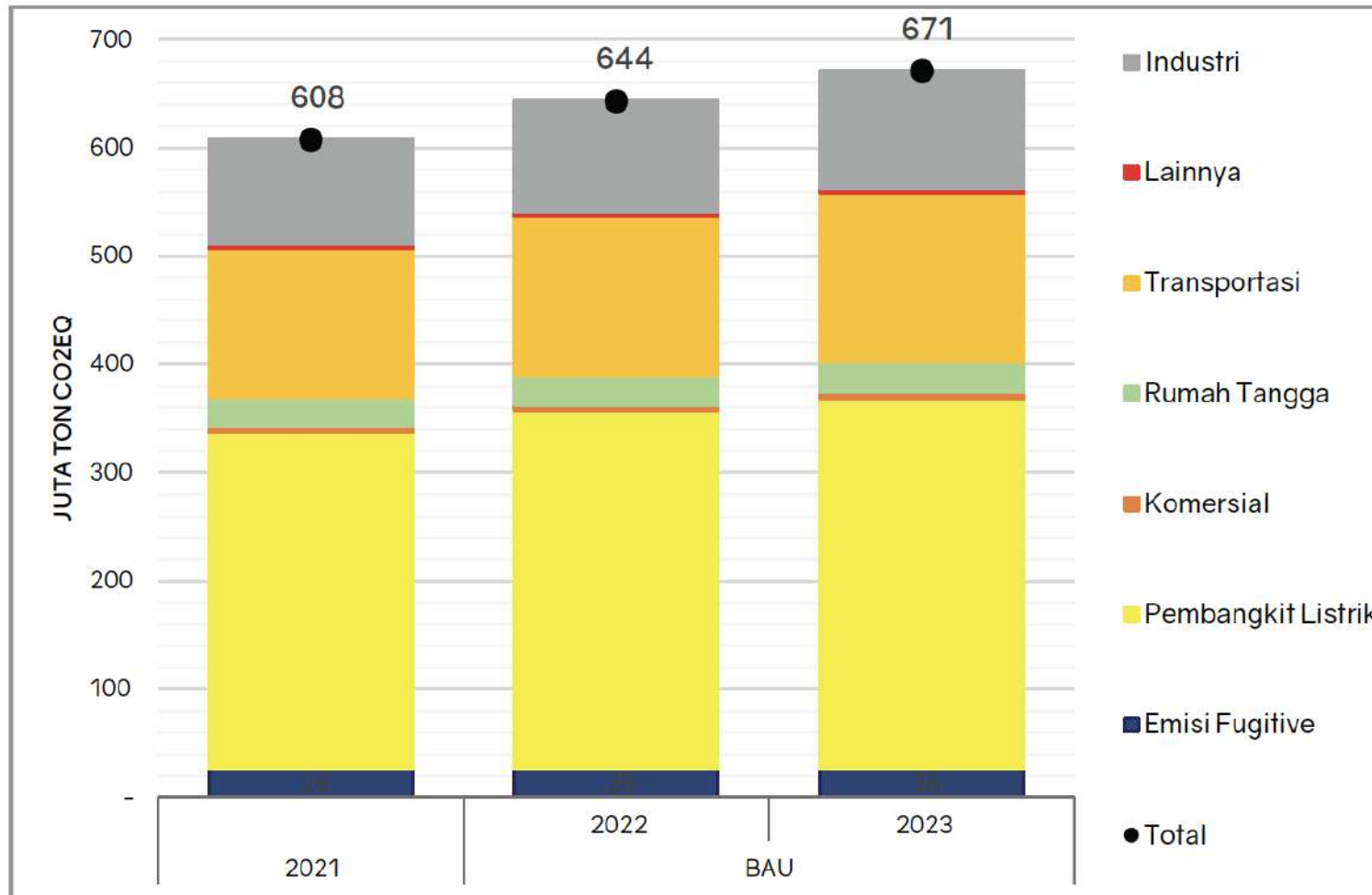
<sup>1</sup>SEKI, Bank Indonesia, 2023, diolah

<sup>2</sup>Badan Pusat Statistik, 2023, diolah

<sup>3</sup> World Bank, 2023, diolah

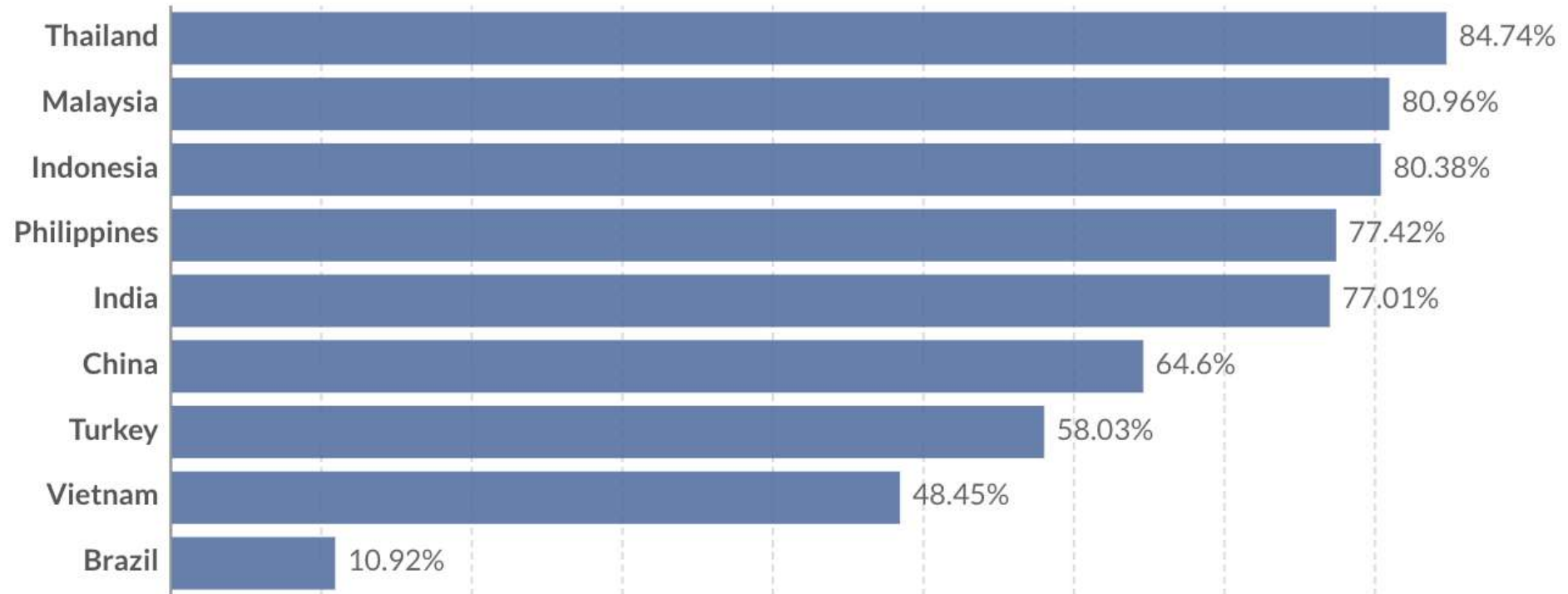
\*data terkini hingga 2022

# Belum Hijaunya Industri dan Listrik Indonesia



Sumber: Dewan Energi Nasional (DEN), 2022

## Porsi Listrik Indonesia dari fosil diatas negara G20 berkembang (2022)

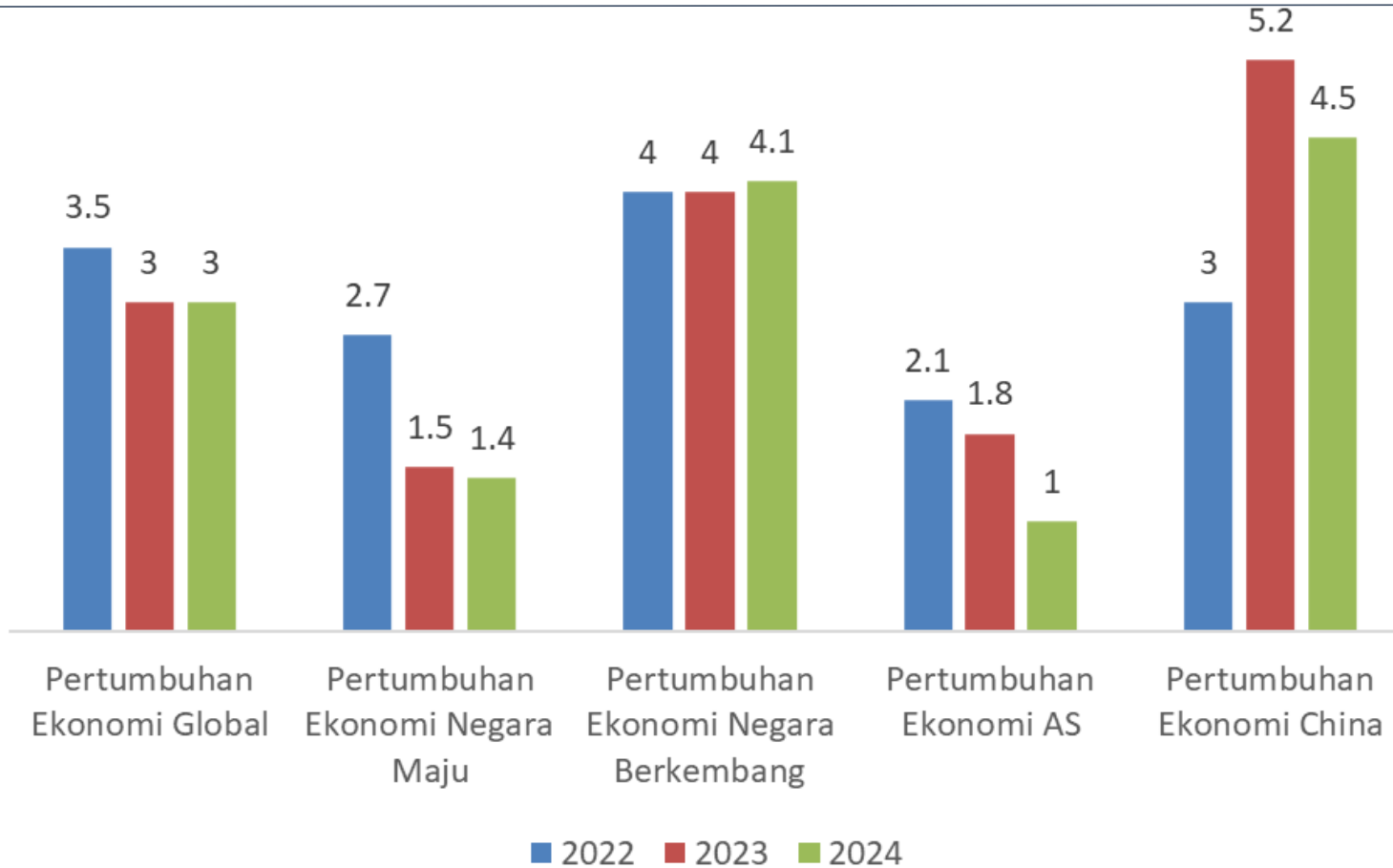


Source: Ember's Yearly Electricity Data; Ember's European Electricity Review; Energy Institute Statistical Review of World Energy

OurWorldInData.org/energy • CC BY

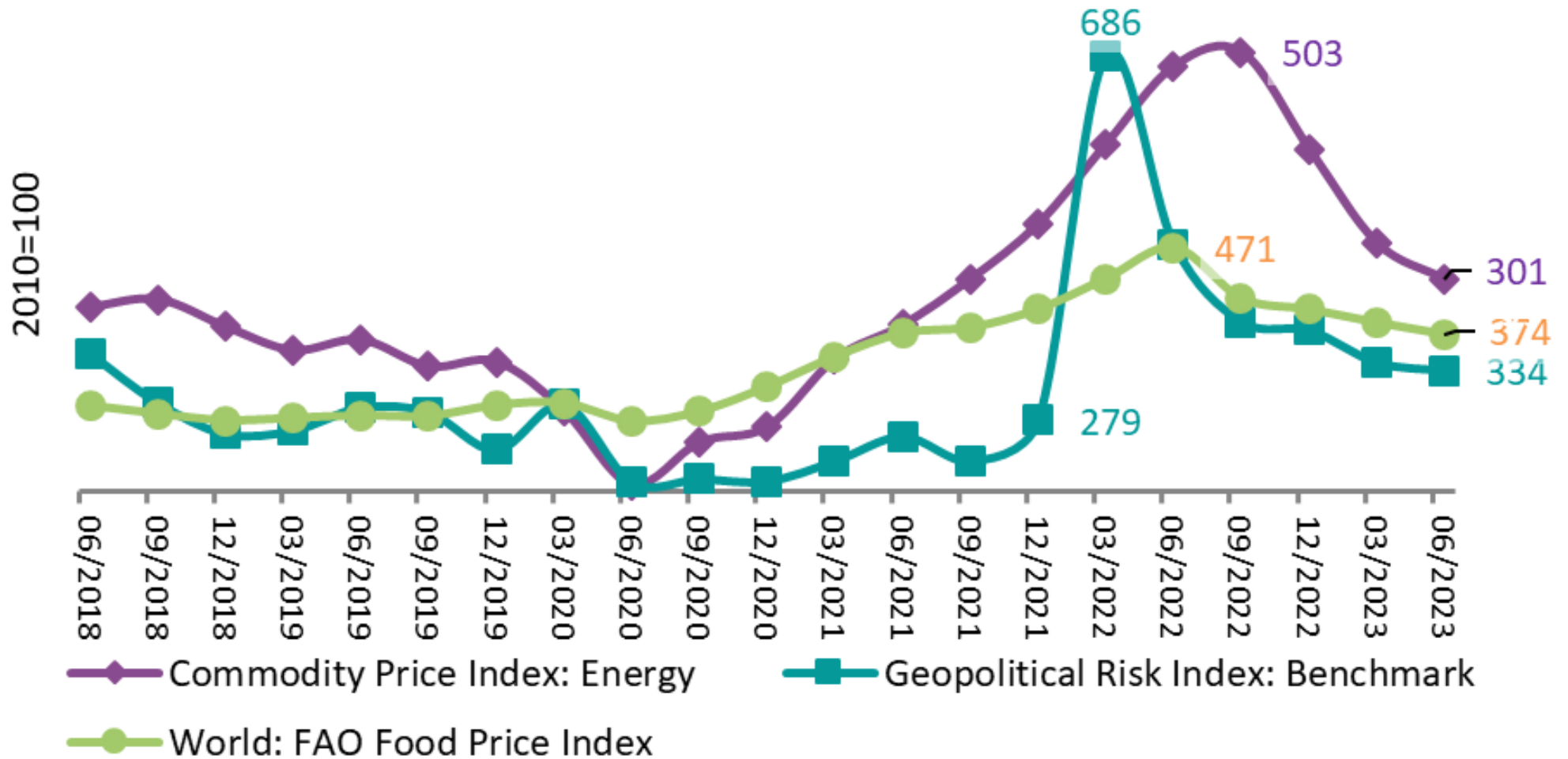


# Ekonomi Global Cenderung Melambat

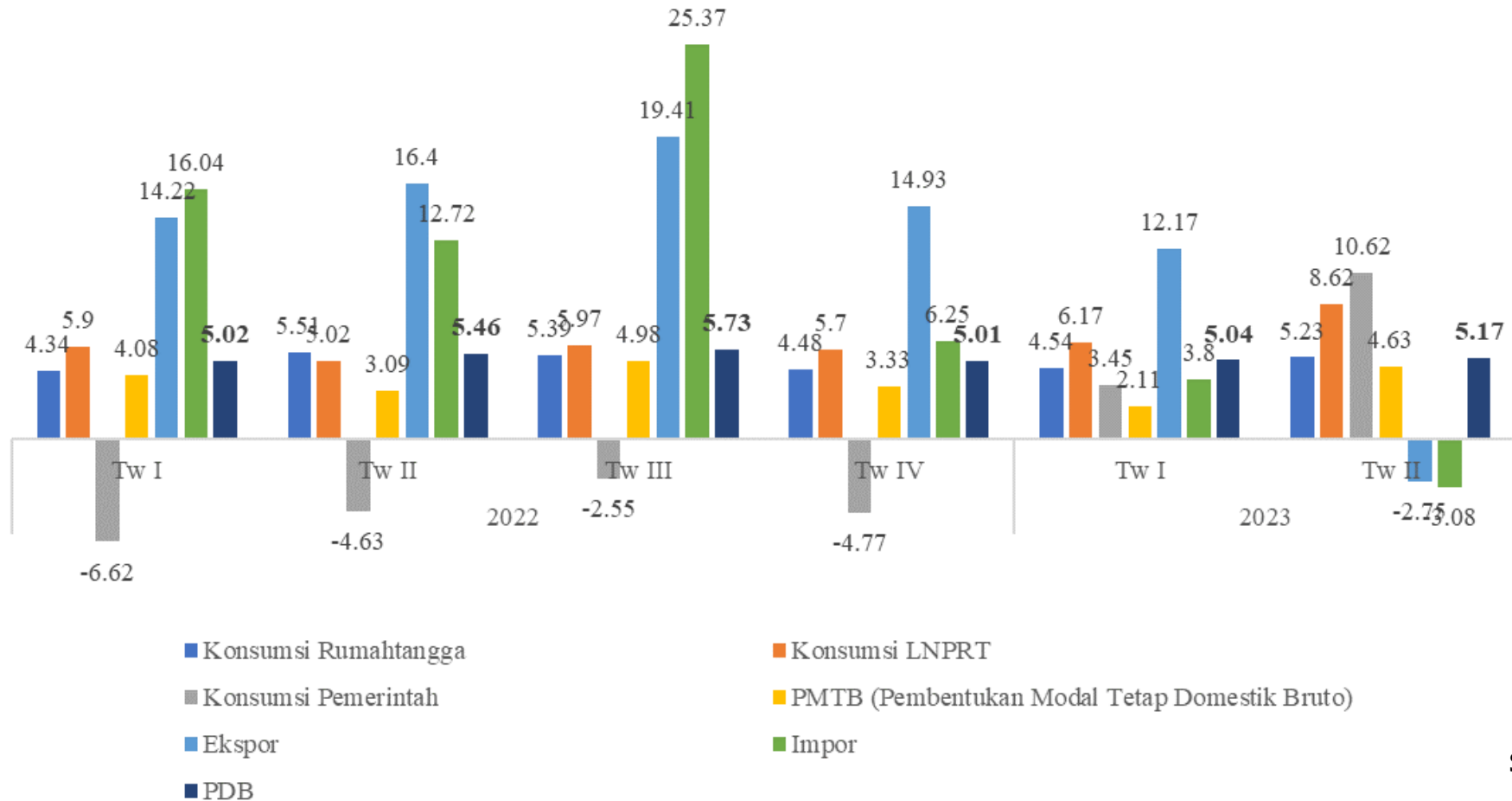


Sumber: World Economic Outlook Update July-  
IMF, 2023

# Geopolitical Risk, Energi Price and Food Price Menurun

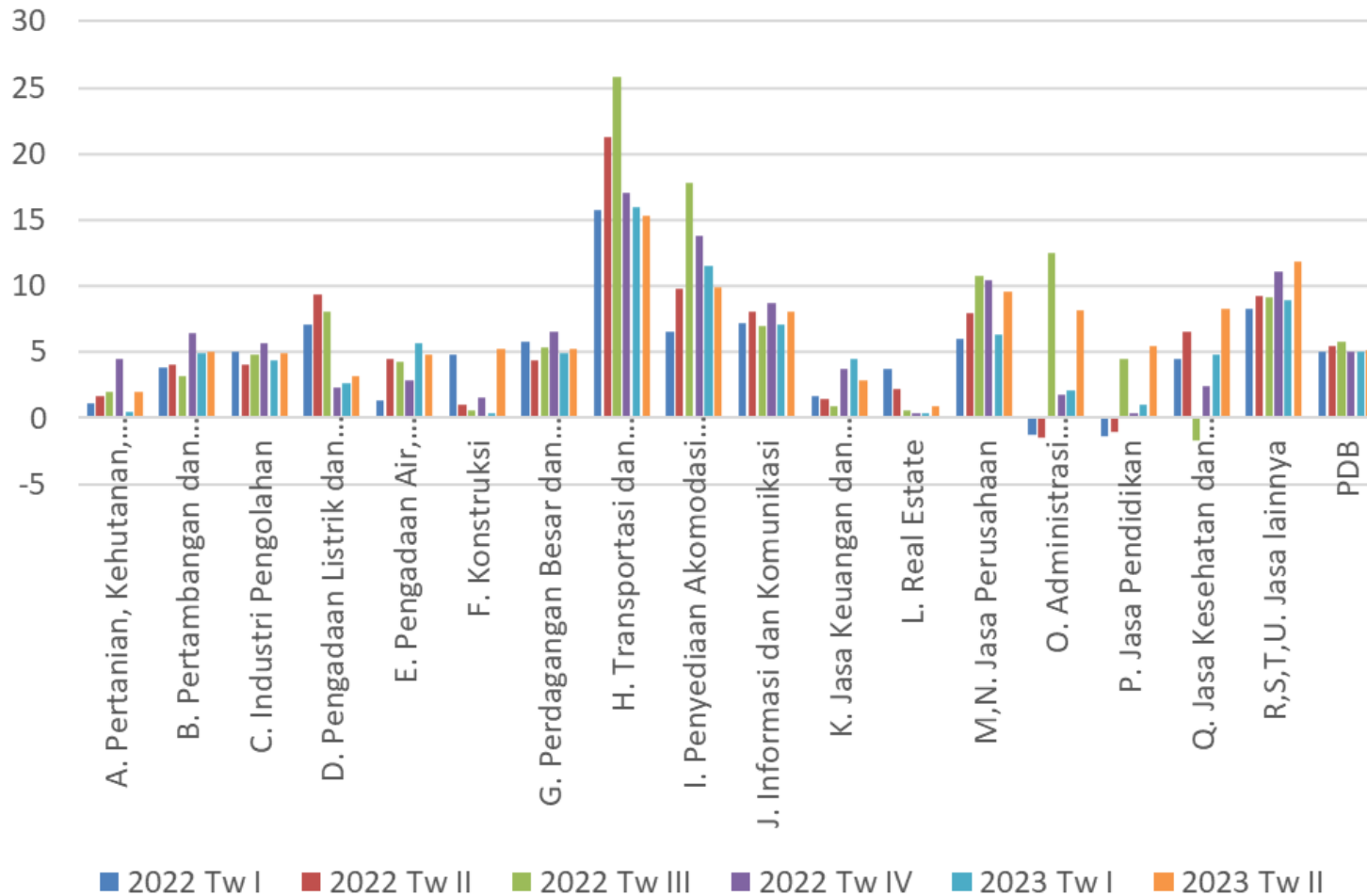


# PDB Sisi Pengeluaran Indonesia: Ekspor menurun, Konsumsi RT Stabil



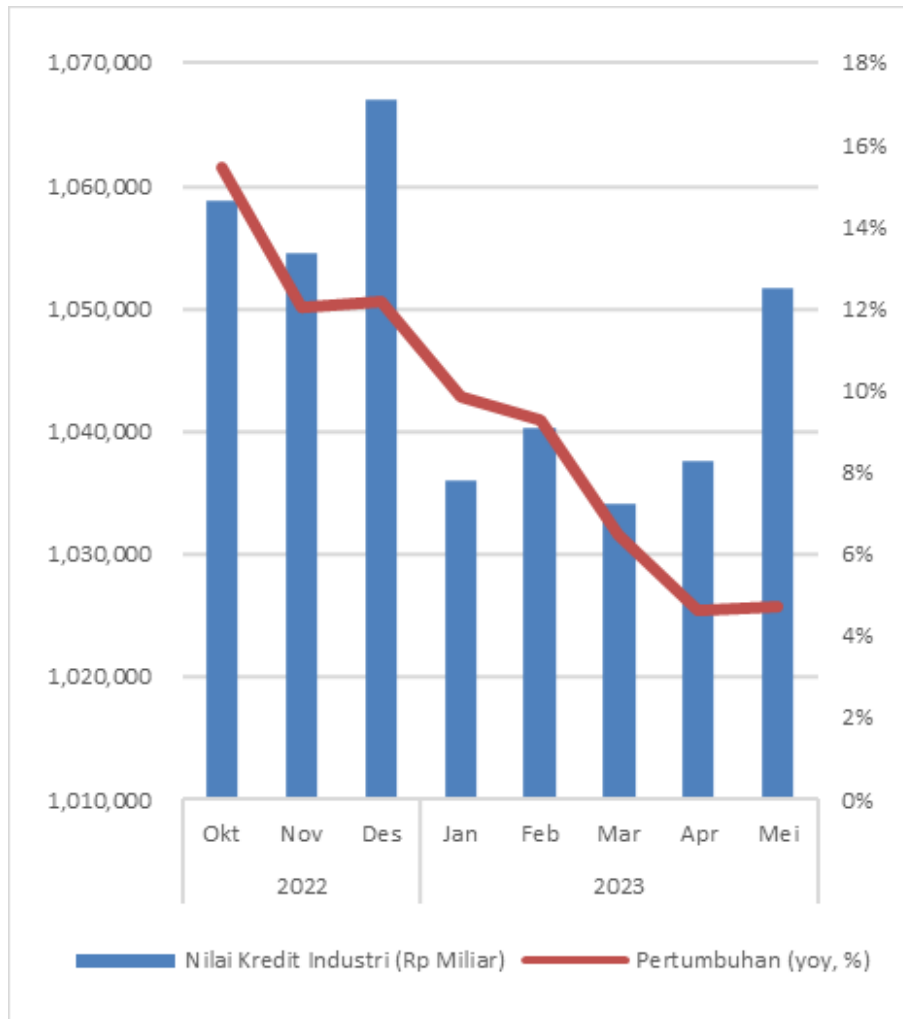
Sumber: BPS

# Pertumbuhan Sektor Manufaktur 2022-2023 < PDB



Sumber: BPS

## Nilai dan Pertumbuhan Kredit ke Manufaktur menurun



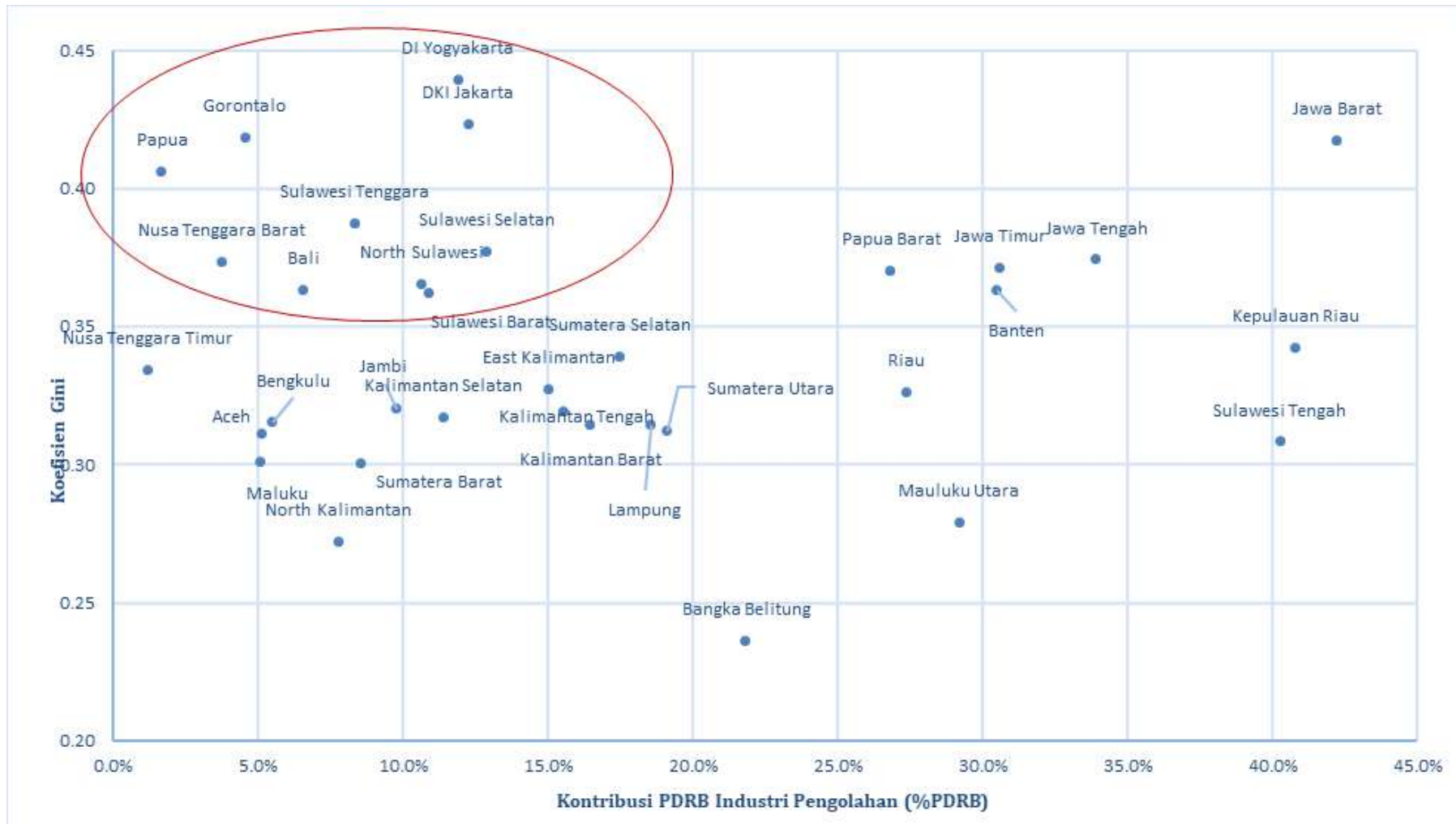
Sumber: OJK



## Empat Sektor Terbesar tumbuh < rata-rata 5,17 persen

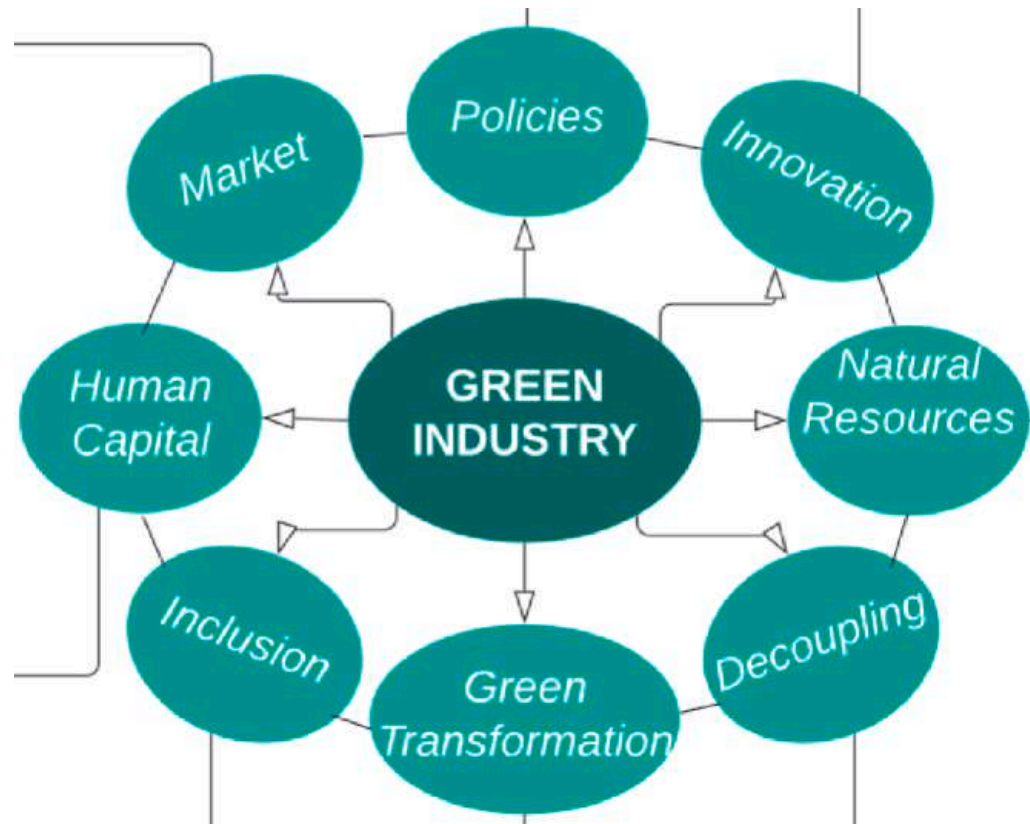
Distribusi (%)		Pertumbuhan (% <i>y-on-y</i> )	
18,25		Industri Pengolahan	4,88
13,35		Pertanian	2,02
12,85		Perdagangan	5,25
10,48		Pertambangan	5,01
9,43		Konstruksi	5,23
5,87		Transportasi & Pergudangan	15,28
4,21		Infokom	8,02
4,10		Jasa Keuangan	2,88
3,30		Adm. Pemerintahan	8,15
2,90		Jasa Pendidikan	5,43
2,48		Akomodasi & Makan Minum	9,89
2,40		Real Estat	0,96
1,94		Jasa Lainnya	11,89
1,84		Jasa Perusahaan	9,59
1,20		Jasa Kesehatan	8,27
1,02		Pengadaan Listrik & Gas	3,15
0,06		Pengadaan Air	4,78

# Proporsi manufaktur rendah, kesenjangan tinggi : K Shaped Recovery



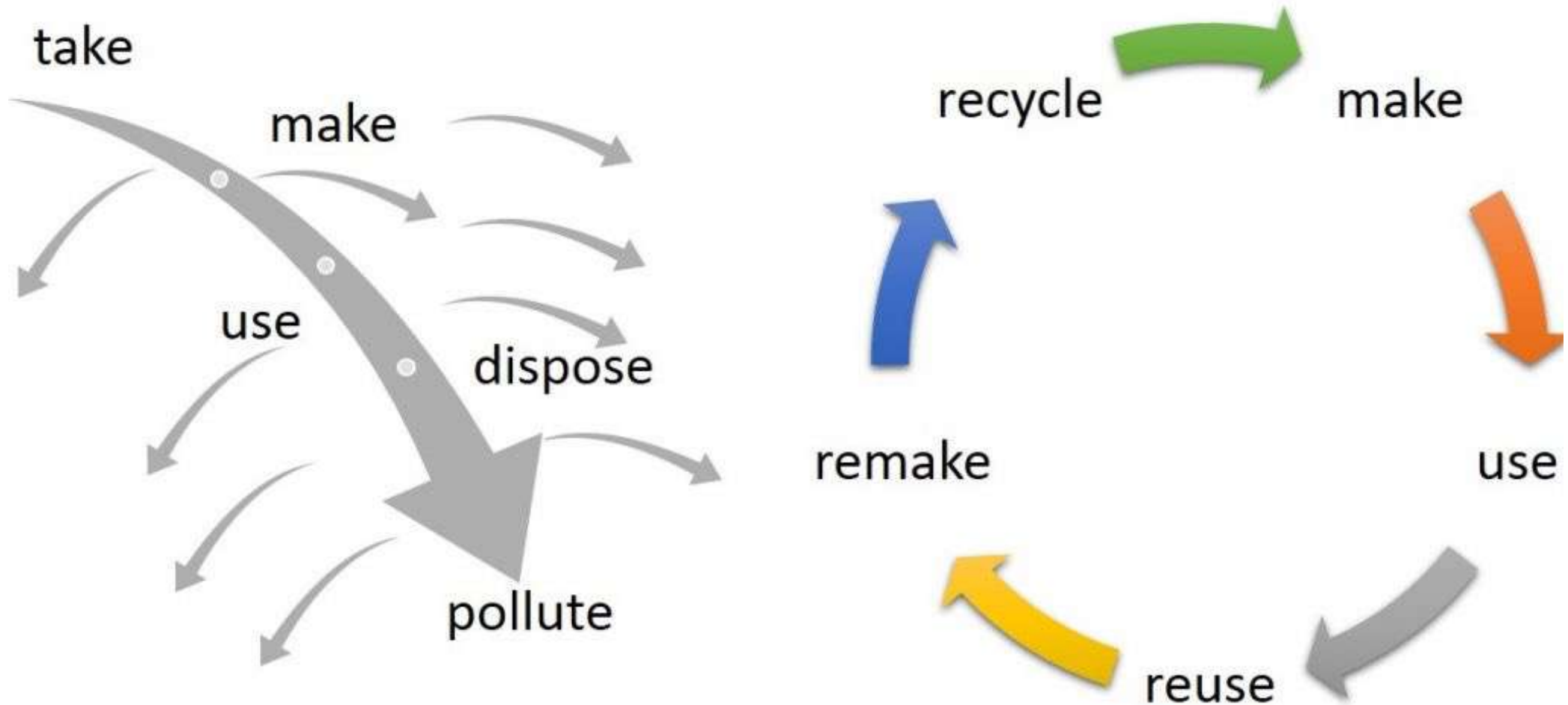
Sumber: BPS (2023)

# Industrialisasi Hijau Sebagai Motor Baru Ekonomi



Sumber: Nyangchak (2022)

# Industrialisasi Hijau = Circular Economy: Efisien, Inovasi & Inklusif



# Peluang & tantangan Teknologi: Baterai Nikel-Cobalt vs LFP (L Iron Phosphate)

---

ELECTRIC POWER | METALS — 21 Apr 2022 | 10:05 UTC

## Almost half of Tesla EVs produced in Q1 had no nickel, cobalt in battery

**Rivian will follow Tesla and change the type of battery cells it uses in standard packs**

April 07, 2023 08:36 AM

PUBLISHED THU, MAR 10 2022 6:06 PM EST | UPDATED THU, MAR 10 2022 7:38 PM EST

## Tesla to use cheaper LFP batteries in small EV, truck

Elon Musk says Tesla will use less-expensive lithium iron phosphate batteries in a coming low-cost small EV, a version of the Semi truck, and eventually the Model 3 and Model Y.



# Inflasi menurun, tingkat bunga stabil

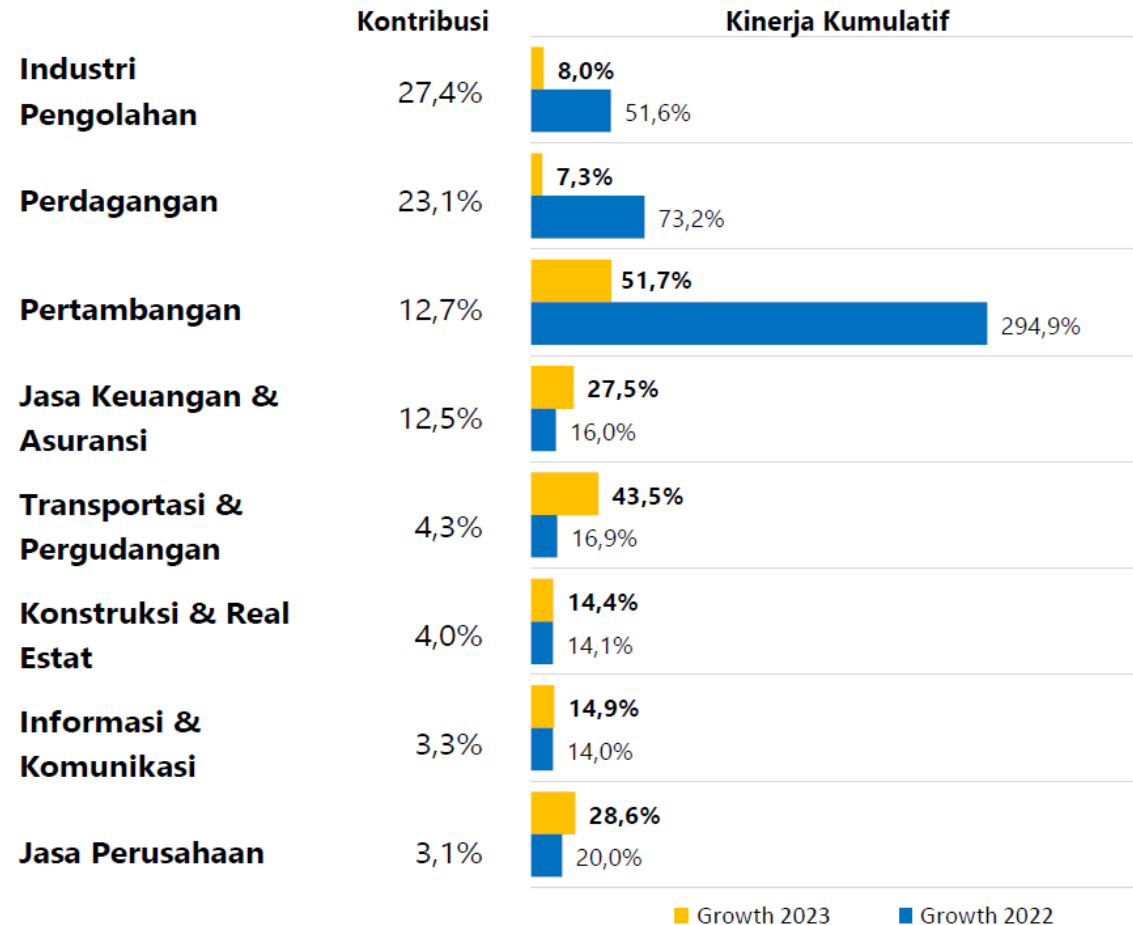


Sumber: SEKI

## Kurs Rupiah dan Reserve tren menurun,



# Tiga Perlima Penerimaan APBN 2023 dari Industri & Perdagangan



Penerimaan sektoral tanpa PPS, DTP, PBB, dan PPh Migas

\*Sumber: Aplikasi Portal DJP dan Dashboard Penerimaan tanggal 2 Juli 2023

# Peluang dan Tantangan Ekonomi Indonesia 2023

---

## Peluang

- Inflasi menurun
- Turisme meningkat
- Kemiskinan menurun
- Pemilu dorong konsumsi
- APBN surplus

## Tantangan

- Konflik Rusia-Ukraine berlanjut
- Suku bunga global naik
- Export menurun
- Pengangguran belum pulih
- Investor wait-n-see hasil pemilu
- Konsumsi RT belum pulih
- Waspada kredit macet (pinjol)
- Kemarau: El Nino & karhutla
- Kesenjangan meningkat

## Proyeksi Ekonomi 2023

Indikator	Asumsi APBN	INDEF Awal (PEI 2023)	INDEF Updated (KTT 2023)
<b>Pertumbuhan PDB</b>	5,3 persen	4,8 persen	Tahunan: 4,9 persen Q3: 4,8 persen
<b>Inflasi (IHK)</b>	3,6 persen	5,6 persen	3 persen
<b>Kemiskinan</b>	7,5 persen- 8,5 persen	9,3 persen	9,3 persen
<b>Tingkat Pengangguran Terbuka</b>	5,3 persen- 6,0 persen	5,7 persen	5,3 persen
<b>Exchange Rate</b>	Rp14.800	Rp 16.000	Rp15.000



A dark blue decorative shape at the bottom of the slide, consisting of a large, smooth, curved area on the left that tapers into a thin, curved strip along the bottom edge, ending in a small, pointed shape on the right.

**Terima Kasih**

# STOCKTAKING ISSUES

---

Lorem ipsum