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Indonesia

Cotton and Products

COTTON ANNUAL

2004

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Report Highlights:
Indonesia's demand for imported cotton is expected to remain relatively stable through 2005, with imports forecast to stay at 2.1 to 2.2 million bales. Growth in import demand is hindered by relatively high cotton prices as well as fierce competition in world textile markets. On the other hand, the sector remains relatively strong, with no expectations for significant a decline in use either. U.S. market share has grown recently, and future advances in U.S. market share with hinge on price relationships, with competing suppliers, particularly Australia.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
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I. SITUATION AND OUTLOOK

Production

Indonesia's domestic production of only about 8,000 tons is of no commercial significance, accounting for less than one percent of the annual cotton use. Furthermore, it is unlikely that cotton production will improve in the near future. Nonetheless, the Ministry of Agriculture is attempting to develop a new variety of cotton in trials on about 5,000 hectares. It is hoped that this new variety will be high yielding and suitable for the local textile industry. While planting of genetically enhanced cotton was once hoped to be able to provide a major boost to local production, commercialization of the Bt variety this marketing year was discontinued as it proved not to be commercially viable.

Consumption

With some indicators pointing to lower demand, and others showing potential for demand growth, cotton use is forecast to remain stable through 2005. Although macro-economic conditions are improving, textile producers express uncertainty regarding prospects for textile and garment industry and cotton demand over the next year. Their primary concerns relate to uncertainty surrounding the upcoming Presidential elections and the policies of the new government, as well as the elimination of the textile quotas in 2005. Relatively high cotton prices will also be a burden for the industry, as cotton comprises the biggest percentage of production costs. In the past when cotton prices were high, mills shifted to synthetic fibers; however, currently synthetic prices are also high. If production costs, particularly labor and energy costs, also increase next year, Indonesia's textile products will lose some of their competitive edge and some overseas market share. Nonetheless, general import demand is not expected to fall significantly through the 2004/05 marketing year.

Cotton use remained at 2.21 million bales (480,000 MT) during marketing year (MY) 02/03 (August 02 – July 03). Reflecting relatively high cotton prices and slower exports of finished products, cotton use for MY03/04 is expected to decline slightly to 2.14 million bales or 465,000 MT. Mills focusing on exports are using more cotton for blends due to growing demand from overseas buyers for textiles with a higher percentage of cotton. On the other hand, mills that focus primarily on the domestic market are tending to reduce cotton use. Domestic demand for textile products experienced a temporary increase due to greater orders for materials during the 2004 political campaign. However, in general, domestic demand remains weak. Regarding quality, locally produced yarn and fabrics are comparable to other products on the world market. Many local integrated textile mills, especially those with licensing agreements with well-known trademarks, have used imported high-tech equipment to produce good quality products to face the stiff competition from China, India, and Pakistan. With expectations that the macro-economic climate will remain stable, plus firm overseas demand for textiles, cotton use is forecast to rebound to 2.21 million bales or 480,000 MT in the MY04/05. Cotton stocks are generally limited to between 1 to 2 months use requirements.

The spinning industry is estimated to be running at about 70 percent capacity. However, firms that have made recent investments and modernized their plants are operating near full capacity.

In 2003, total yarn production is estimated to have increased slightly to approximately 1.7 million tons from 1.6 million tons in 2002. The increase is reflected in the growth of cotton yarn exports during 2003, which are estimated to have increased about 8 to 10 percent. Yarn production is expected to remain stable in 2004 as the domestic textile industry struggles to maintain margins in the face of relatively high cotton prices and stiff competition in the world textile market.

Trade

In line with overall demand expectations, imports are forecast to remain relatively stable through MY04/05. Due to relatively high cotton prices and slow growth in textile exports, cotton imports are expected to decline just slightly in MY03/04 to 2.16 million bales (around 470,000 MT), down about four percent from the previous year. However, with expectations for continued recovery of the local economy plus textile export prospects, cotton imports are forecast to rebound to 2.21 million bales or 480,000 MT in MY04/05. [Note: as also mentioned in the previous GAIN report, no reliable data are available on the volume of cotton imports. Import estimates in the PSD tables does not reflect official data published by the BPS Statistics Indonesia, as by all accounts the BPS data is much higher than the actual level of cotton imports. Therefore, BPS data is included in the trade matrices to provide a rough approximation of relative market share].

U.S. market share increased in 2003 and surpassed that for Australia, traditionally the dominant cotton supplier. During January – October 2003, U.S. share was estimated to have been 36 percent, while Australia's market fell to 32 percent. Africa and Brazil have increased their total exports to Indonesia. The position of U.S. cotton will continue to depend on the prices and availability.

The GSM-102 credit guarantee program has played a minor role in facilitating transactions for U.S. cotton imports in MY03/04. Registrations through April 2004 totaled about $18.80 million. Importers still cite constraints in using the program due to the limited number of local banks eligible to participate, the limited terms offered by the participating banks, and the sometimes-burdensome administrative requirements of the program. Therefore, most local importers still rely on traditional financing mechanisms, including using L/Cs through offshore banks in Singapore and Hong Kong.

Imports of cotton yarn and cotton fabric are estimated to have declined about 5 percent in 2003. Most cotton yarn and fabric imported is too expensive to be used to make products for the domestic market and is therefore used primarily to produce textile products for export. Pakistan and China were still the major suppliers of cotton yarn (about 31 and 26 percent market share), while China and Hong Kong were the major suppliers of cotton fabric. The U.S. ships very little cotton yarn and almost no cotton fabric to Indonesia.

The major markets for Indonesia's cotton yarn exports are Japan, China and Hong Kong, with only about 4 percent destined to the US. On a value basis, in 2003 cotton fabric exports increased about 8 percent, while on a quantity basis, exports were flat. Hong Kong, Italy and Japan are the major markets for Indonesian's cotton fabric.

The value of textile exports rose slightly to about $ 7.03 billion in 2003, a 2 percent increase over the previous year, while on a volume basis, exports were up 5 percent. Garments accounted for 55 percent of the total export value, followed by fabrics (22 percent) and Yarns (17 percent). In terms of the relative importance of the export market for each of the sectors, roughly 46 percent of yarn production is exported, 30 percent of fabrics, and 72 percent of finished garments.

For 2005, some industry observers suggest textile exports will decline due to the abolition of the quotas as about 60 percent of textile exports are to quota countries. Others forecast an increase textile exports due to more mills focusing on the export market as domestic market weakens. Furthermore, many local mills are anxiously awaiting the removal of the quotas as they feel their mills will be in a solid competitive position to capitalize on new market opportunities in the liberalized environment.

Investment

By all accounts, Indonesia's domestic textile sector is in dire need of new investment to upgrade equipment and facilities. However, in 2004, most mills are adopting a "wait and see" approach before making new investments. Upcoming developments on the domestic and political fronts will be key to future investment decisions. Capital investment in the textile industry fell an estimated 2 percent in 2003. However, some medium and large-sized firms did make new investments in spinning machines to position themselves to produce high quality products for the post-quota era. While further investment is needed in new machines and technology, lack of local financing resources remains a significant constraint.

Policy

While no clear policy has yet been developed to deal with the issue, the government views the elimination of the quotas as a serious threat that may place the textile industry in a less competitive position, particularly vis-à-vis China and India. There is particular concern about losing market share in the United States, European Union, and Canada. Therefore, the government is encouraging use of lower-cost locally available inputs such as polyester, rayon, and silk, as substitutes for cotton. In addition, the Government is also considering support measures such as investment financing, lower interest rates, lower port fees, and more effective labor regulations. However, as indicated above, many individual companies view the non-quota system as creating opportunities for expansion to new markets and as an incentive to improve efficiency, quality, and productivity.

Smuggling of imported textile products and second hand garments continues to be a serious issue for the local textile industry. There is a great deal of demand for these lower-priced products in Indonesia, giving traders strong incentives to import the products. New documentation requirements to verify the types of products imported have been ineffective in stopping these imports. Reportedly, products can still enter by simply manipulating HS codes, volume and weight on the import documents.

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II. STATISTICAL TABLE

Table 1. PSD Cotton (HS code 5201;5202;5203)

PSD Table					Unit :	(Ha)(MT)
Country	Indonesia					
Commodity	Cotton					
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official	Post Estimate	USDA Official	Post Estimate	USDA Official	Post Estimate
Market Year Begin		08/2002		08/2003		08/2004
Area Planted	0	15,000	0	12,000	0	12,000
Area Harvested	12,000	12,000	12,000	10,000	0	10,000
Beginning Stocks	98,848	90,000	81,865	50,000	74,680	43,000
Production	8,056	8,000	8,056	8,000	0	8,000
Imports	489,885	485,000	478,998	470,000	0	480,000
TOTAL SUPPLY	596,789	583,000	568,919	528,000	74,680	531,000
Exports	3,266	33,000	4,355	10,000	0	10,000
USE Dom. Consumption	500,771	480,000	478,998	465,000	0	480,000
Loss Dom. Consumption	10,886	10,000	10,886	10,000	0	10,000
TOTAL Dom. Consumption	511,657	500,000	489,884	475,000	0	490,000
Ending Stocks	81,865	50,000	74,680	43,000	0	31,000
TOTAL DISTRIBUTION	596,788	583,000	568,919	528,000	0	531,000

PSD Table					Conversion: 0.00459292	
Country	Indonesia				Units : HA/1000 Bales	
Commodity	Cotton					
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official	Post Estimate	USDA Official	Post Estimate	USDA Official	Post Estimate
Market Year Begin		08/2002		08/2003		08/2004
Area Planted	0	15,000	0	12,000	0	12,000
Area Harvested	12,000	12,000	12,000	10,000	0	10,000
Beginning Stocks	454	413	376	230	343	197
Production	37	37	37	37	0	37
Imports	2,250	2,228	2,200	2,159	0	2,205
TOTAL SUPPLY	2,741	2,678	2,613	2,425	343	2,439
Exports	15	152	20	46	0	46
USE Dom. Consumption	2,300	2,205	2,200	2,136	0	2,205
Loss Dom. Consumption	50	46	50	46	0	46
TOTAL Dom. Consumption	2,350	2,251	2,250	2,182	0	2,251
Ending Stocks	376	230	343	197	0	142
TOTAL DISTRIBUTION	2,741	2,632	2,613	2,425	0	2,439

Note : The MY2002 (Aug 2002 – July 2003) imports in both PSD tables do not reflect data published by the BPS Statistics Indonesia in the Trade Matrix, because by all accounts the BPS data is much higher than the actual level of cotton imports.

Table 2. Import Trade Matrix (Marketing Year)

Import Trade Matrix					
Country	Indonesia				
Commodity	Cotton				
Time Period	Aug - Jul			Units:	1,000 MT
Imports for:	2001		2002		2003
U.S.	160	U.S.	215	U.S.	44
Others		Others		Others	
Australia	162	Australia	290	Australia	30
Ivory Coast	16	China	43	American Samoa	6
Syria	15	Benin	18	South Africa	5
Brazil	15	Ivory Coast	14	Ivory Coast	4
American Samoa	9	Pakistan	12	China	4
South Africa	9	Syria	11	Switzerland	2
Benin	8	American Samoa	11	Benin	2
China	7	South Africa	10	Togo	2
Pakistan	6	Tanzania	8	Brazil	2
Tanzania	6	Central African Re	7	Batam	2
Total for Others	253		424		59
Others not Listed	50		70		17
Grand Total	463		709		120

Source: BPS Statistics Indonesia, For MY2003 is only from Aug to Oct 2003

Import Trade Matrix			
Country	Indonesia		
Commodity	Cotton		
Time Period	Aug - Oct	Units:	1,000 MT
Imports for:	2002		2003
U.S.	45	U.S.	44
Others		Others	
Australia	104	Australia	30
China	10	American Samoa	6
Benin	7	South Africa	5
Ivory Coast	7	Ivory Coast	4
American Samoa	5	China	4
South Africa	5	Switzerland	2
Pakistan	4	Benin	2
Syria	4	Togo	2
Singapore	2	Brazil	2
Hong Kong	2	Batam	2
Total for Others	150		59
Others not Listed	19		17
Grand Total	214		120

Source: BPS Statistics Indonesia

Table 3. Import Trade Matrix (Calendar Year)

Import Trade Matrix					
Country	Indonesia				
Commodity	Cotton				
Time Period	Jan - Oct			Units:	1,000 MT
Imports for:	2001		2002		**2003**
U.S.	211	U.S.	156	U.S.	176
Others		Others		Others	
Australia	342	Australia	184	Australia	159
Pakistan	29	Ivory Coast	19	China	31
Togo	13	China	17	Benin	10
Ivory Coast	13	Syria	13	American Samoa	9
Syria	10	Benin	13	South Africa	9
Benin	8	South Africa	11	Ivory Coast	8
China	8	Pakistan	9	Pakistan	7
South Africa	7	Brazil	9	Tanzania	7
Brazil	6	Hong Kong	6	Central African Rep	7
Switzerland	5	Togo	4	Syria	5
Total for Others	441		285		252
Others not Listed	48		59		54
Grand Total	700		500		482

Source: BPS Statistics Indonesia

Table 4. Actual Textile Production in CY 2001 – 2003 (In Metric Tons)

Products	2001	2002	2003
MANMADE FIBERS	961,041	777,395	776,200
Viscose Rayon	361,352	292,301	287,070
Polyester Staple	599,689	485,094	489,130
YARNS	1,915,459	1,559,867	1,664,541
Nylon Filament	42,535	34,639	35,742
Polyester Filament	648,144	527,820	524,514
Spun Yarn	1,224,780	997,408	1,104,285
FABRICS	1,561,823	1,275,484	1,290,820
Woven Fabric	1,327,550	1,084,162	1,099,683
Knitted Fabric	234,273	191,322	191,137
GARMENTS	565,524	462,343	461,632
OTHER TEXTILE PRODUCTS	42,995	35,339	35,284

Source: "Fact and Figures Indonesian Textile Industry 2003", Ministry of Industry and Trade

Table 5. Indonesian Textile and Textile Product Exports (CY 2001 – 2003)
Volume: in Metric Tons; Value: in US$ 1,000

PRODUCTS	2001		2002		2003*	
	Volume	Value	Volume	Value	Volume	Value
FIBERS	132,117	122,246	208,537	181,958	198,258	136,318
Natural Fiber	21,424	21,298	25,258	24,210	47,582	18,499
a. Cotton	20,897	20,395	23,608	22,460	44,436	16,649
b. Silk	68	133	136	186	334	462
c. Wool	69	369	293	953	517	740
d. Others	390	401	1,221	611	2,295	647
Synthetics	110,693	100,948	183,279	157,748	150,676	117,818
YARNS	713,081	1,243,836	762,313	1,229,482	770,642	1,208,653
FABRICS	400,598	1,661,013	367,857	1,404,354	381,151	1,523,387
GARMENTS	379,906	4,344,551	328,787	3,805,458	332,211	3,926,798
TEXTILE ARTICLES	135,239	304,049	91,181	267,306	90,982	238,331
TOTAL	1,760,941	7,675,696	1,758,675	6,888,559	1,773,244	7,033,487

Source: "Fact and Figures Indonesian Textile Industry 2003", Ministry of Industry and Trade
* Estimation

Table 6. Indonesian Textile and Textile Product Imports (CY 2001 – 2003)
Volume: in Metric Tons; Value: in US$ 1,000

PRODUCTS	2001		2002		2003*	
	Volume	Value	Volume	Value	Volume	Value
FIBERS	977,595	1,336,116	806,846	921,617	769,207	948,933
Natural Fiber	769,490	1,077,117	638,919	720,478	606,934	742,093
a. Cotton	762,279	1,066,298	632,630	707,620	600,998	728,942
b. Silk	327	429	352	411	338	421
c. Wool	1,730	7,626	1,901	10,209	1,844	10,414
d. Others	5,155	2,763	4,037	2,238	3,754	2,316
Synthetics	208,105	258,999	167,927	201,139	162,273	206,840
YARNS	84,668	261,348	83,805	220,398	79,520	190,450
FABRICS	153,216	752,265	116,160	588,650	87,935	459,166
GARMENTS	11,947	17,561	11,647	27,636	4,268	14,007
TEXTILE ARTICLES	38,302	72,824	30,302	66,901	21,350	60,566
TOTAL	1,265,728	2,440,114	1,048,760	1,825,202	962,280	1,673,121

Source: "Fact and Figures Indonesian Textile Industry 2003", Ministry of Industry and Trade
* Estimation

**Table 7. Indonesian Cotton Exports (MY 2001-2003)
HS Code 5201, 5202, 5203**

Export Trade Matrix					
Country	Indonesia				
Commodity	Cotton				
Time Period	Aug - Jul			Units:	1,000 MT
Exports for:	2001		2002		**2003**
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Hong Kong	5	Taiwan	7	Hong Kong	2
Taiwan	4	China	6	China	2
Japan	2	Hong Kong	6	Taiwan	2
India	1	Japan	3	Japan	1
Philippines	1	India	2	Thailand	1
Italy	1	Italy	2	Vietnam	1
Belgium	1	Philippines	2		
France	1	Thailand	1		
Germany	1	Vietnam	1		
Total for Others	17		30		9
Others not Listed	3		3		1
Grand Total	20		33		10

Source: BPS Statistics Indonesia, MY2003 is only from Aug to Oct 2003

Table 8. Indonesian Cotton Yarn Exports (CY2000 –2002)
HS Code 5204, 5205, 5207

Export Trade Matrix					
Country	Indonesia				
Commodity	Cotton Yarn				
Time Period	Jan - Dec			Units:	1,000 MT
Exports for:	2001		2002		**2003**
U.S.	4	U.S.	3	U.S.	4
Others		Others		Others	
Japan	22	Japan	17	Japan	17
Hong Kong	18	Hong Kong	16	China	14
Rep. of Korea	16	Rep. of Korea	14	Hong Kong	14
China	7	China	11	Rep. of Korea	11
Nigeria	3	Taiwan	6	Malaysia	5
Taiwan	3	Malaysia	6	Sri Lanka	4
Singapore	2	Nigeria	5	Philippines	4
Malaysia	2	Singapore	4	Taiwan	4
Australia	2	Philippines	4	Germany	2
Germany	2	Sri Lanka	2	Nigeria	2
Sri Lanka	2	Germany	2	Italy	2
Bangladesh	2	Bangladesh	2	Singapore	2
Philippines	1	Australia	2	United Arab Emira	2
Total for Others	82		91		83
Others not Listed	10		11		13
Grand Total	96		105		100

Source: BPS Statistics Indonesia, For CY2003 is only from Jan to Oct 2003

Table 9. Indonesian Cotton Fabric Exports (CY2001 – 2003)
HS Code 5208 – 5209

Export Trade Matrix					
Country	Indonesia				
Commodity	Cotton Fabric				
Time Period	Jan - Dec			Units:	1,000 MT
Exports for:	2001		2002		**2003**
U.S.	10	U.S.	8	U.S.	6
Others		Others		Others	
Japan	11	Hong Kong	10	Hong Kong	8
Italy	10	Japan	7	Italy	7
Bangladesh	5	Italy	5	Japan	7
Hong Kong	4	Bangladesh	4	Bangladesh	5
United Kingdom	4	Cambodia	3	Germany	3
Philippines	4	Philippines	3	China	2
Cambodia	4	Belgium	3	Philippines	2
Turkey	3	Germany	3	Belgium	2
Belgium	2	United Kingdom	3	Turkey	2
Sri Lanka	2	Turkey	2	United Kingdom	2
Spain	2	Spain	2	Rep. of Korea	1
Germany	2	Sri Lanka	2	Sri Lanka	1
Taiwan	2	China	2	Thailand	1
Malaysia	1	Rep. of Korea	2	Malaysia	1
China	1	Malaysia	2	Cambodia	1
Rep. of Korea	1	Thailand	1	Vietnam	1
United Arab Emirates	1	Taiwan	1	Spain	1
France	1	Australia	1	United Arab Emirates	1
Canada	1	United Arab Emirates	1	Taiwan	1
Netherland	1	Netherland	1	India	1
Total for Others	62		58		50
Others not Listed	12		13		9
Grand Total	84		79		65

Source: BPS Statistics Indonesia, For CY2003 is only from Jan to Oct 2003

Table 10. Indonesian Cotton Yarn Imports (CY 2001 – 2003)
HS Code 5204, 5205, and 5207

Import Trade Matrix					
Country	Indonesia				
Commodity	Cotton Yarn				
Time Period	Jan - Dec			Units:	1,000 MT
Imports for:	2001		2002		2003
U.S.	0		0		0
Others		Others		Others	
Pakistan	6	Pakistan	7	Pakistan	7
India	3	China	6	China	6
Hong Kong	2	India	3	Batam Island*	3
Australia	2	Hong Kong	2	Taiwan	2
China	1	Taiwan	2	India	2
Taiwan	1	Australia	1	Australia	1
Thailand	1	Rep. of Korea	1	Hong Kong	1
Total for Others	16		22		22
Others not Listed	2		2		1
Grand Total	18		24		23

Source: BPS Statistics Indonesia, for CY2003 is only from Jan to Oct 2003

Table 11. Indonesian Cotton Fiber Imports (CY 2001 – 2003)
HS Code 5208 and 5209

Import Trade Matrix					
Country	Indonesia				
Commodity	Cotton Fabric				
Time Period	Jan - Dec			Units:	1,000 MT
Imports for:	2001		2002		2003
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
China	8	China	8	China	4
Hong Kong	5	Batam Island*	7	Batam Island*	4
Rep. of Korea	3	Hong Kong	4	Hong Kong	2
Taiwan	2	Rep. of Korea	2	Rep. of Korea	1
Batam Island*	1	Taiwan	2	Taiwan	1
Total for Others	19		23		12
Others not Listed	2		1		2
Grand Total	21		24		14

Source: BPS Statistics Indonesia, for CY2003 is only from Jan to Oct 2003

Note : *Batam Island is a Free Trade Zone in Indonesia, however according to BPS Statistics Indonesia, if products are shipped to Indonesia and being processed in Batam Island, they are treated as imported products from abroad.

Table 12. Cotton and Textiles Import Duty and Value Added Tax

HS Code	Description	Import Duty (%)	VAT (%)
5201.00.000	Cotton, not carded or combed.	0	10
5202	Cotton waste (including yarn waste and garmented stock)	5	10
5203	Cotton, carded or combed.	5	10
5204	Cotton sewing thread, whether or not put up for retail sale	5	10
5205	Cotton yarn (other than sewing thread), containing 85% or more by weight of cotton, not put up for retail sale.	5	10
5206	Cotton yarn (other than sewing thread), containing less than 85% by weight of cotton, not put up for retail sale.	5	10
5207	Cotton yarn (other than sewing thread) put up for retail sale	5	10
5208	Woven fabrics of cotton, containing 85% or more by weight of cotton, weighing not more than 200 g/m sq.		
5208.11 - 5208.19	- Unbleached	10	10
5208.21 - 5208.29	- Bleached	10	10
5208.31 - 5208.49	- Dyed	10 - 15	10
5208.51 - 5208.59	- Printed	10	10
5209	Woven fabrics of cotton, containing 85% or more by weight of cotton, weighing more than 200 g/m sq.		
5209.11 - 5209.19	- Unbleached	10	10
5209.21 - 5209.29	- Bleached	10	10
5209.31 - 5209.49	- Dyed	10	10
5209.51 - 5209.59	- Printed	10	10

Source: Indonesian Customs Tariff Book 2004, effective January 2004

Table 13. Exchange Rates

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2000	7,414	7,517	7,598	7,988	8,728	8,742	9,055	8,370	8,891	9,483	9,524	9,385
2001	9,488	9,914	10,460	12,117	11,423	11,436	9,744	9,045	9,696	10,358	10,476	10,450
2002	10,383	10,222	9,779	9,441	9,823	8,741	9,171	8,938	9,057	9,257	9,020	8,929
2003	8,877	8,917	8,957	8,711	8,274	8,259	8,643	8,488	8,389	8,520	8,537	8,465
2004	8,441	8,447	8,587	8,626	8,693							

Source: BPS Statistics Indonesia and Business Indonesian Daily Newspaper
Note: - May 2004 exchange rate is quoted from May 7, 2004
- BPS data available up to August 2003