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Indonesia

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Report Highlights:
Indonesia is an archipelago nation of around 212 million people (2002), making it the world's fourth most populous nation. U.S. agricultural exports in 2002 were US $859 million and during the first six months of 2003 reached a record level $522 million. The rapid growth of the modern supermarket sector and the western restaurant chains will boost the availability of imported products. Vast opportunities exist for U.S. food exporters in Indonesia, but potential entrants must establish personal contacts and be aware of import regulations.

Includes PSD Changes: No
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Annual Report
Jakarta [ID1]
[ID]

SECTION I. MARKET OVERVIEW

Economic Trends and Outlook

Indonesia is an archipelago nation of around 212 million people (2002), making it the world's fourth most populous nation. Real GDP growth averaged over 7% per year for the decade beginning in 1987. In 1996, (before the financial and economic crisis hit much of Asia), total U.S. agricultural and forestry products exports to Indonesia were nearly $900 million. Beginning in late 1997, however, Indonesia experienced a dramatic collapse in its economy. This sharp economic contraction, exacerbated by a severe El Nino drought in 1997/98 and ongoing political uncertainties, resulted in Indonesia moving from a 'Big Emerging Market' status to one of the world's largest recipients of food and humanitarian assistance. Concomitantly, U.S. agricultural and forestry exports dropped to $813 million in 1997 and $495 million in 1998.

In 1999, the economy and in turn U.S. agricultural exports, began to recover. Flat growth in 1999 was followed by 4.9 percent GDP growth in 2000, 3.3 percent growth in 2001, 3.3 percent growth in 2002. For 2003, growth is expected to approach 4 percent, and hit 4.5 percent in 2004. U.S. agricultural exports rebounded to $571 million in 1999, $718 million in 2000, $949 million in 2001, $859 million in 2002, and during the first six months of 2003 reached a record $522 million. This would make Indonesia once again a top fifteen market for U.S. agricultural exports. USDA export programs have played a crucial role in this achievement, most notably the GSM-102 Export Guarantee Program, Supplier Credit Guarantee Program, the PL-480 and Section 416(b) food assistance programs.

Though surprisingly resilient, the Indonesian economy must overcome numerous challenges before achieving a sustainable foundation for long-term growth. The most serious challenges include a weak banking sector, large public and private sector debt, exchange rate volatility, entrenched corruption, political uncertainty, and terrorist elements in the country. On the positive side, fundamental political changes have made Indonesia the world's third largest democracy, a major first step towards furthering political and economic reforms. The overall economic outlook for Indonesia is for slow but continued growth with annual U.S. agricultural exports expected to approach $1 billion annually.

Market Opportunities

- Indonesia's population of around 212 million (2002) is relatively young with more than half the population (62%) between 10-49 years old. Nearly 60 percent of the population lives on Java and accounts for 60-65 percent of the sales of fast moving consumer goods. Java also has the best infrastructure although urban areas in Sumatera, Bali and Sulawesi are also developing.

- It is currently estimated that the upper and middle income groups combine to represent 15% percent of the population, or equal to about 32 million people. This is about half of the pre-crisis level of 78 million. Most of these people live in the major urban areas, including cities on Java (Jakarta and its surroundings, 12.5 million people; Surabaya, 3 million; Yogyakarta and surroundings 1.8 ; Bandung, 2 million; and Semarang, 1.3 million); Sumatera (Medan, 2.1 million; and Palembang, 1.5 million); Sulawesi (Makassar, 1.5 million; and Manado, 1 million); and the island of Bali (1.6 million); Kalimantan (Balikpapan & Samarinda, 1 million)

- The population has become increasingly more literate and Westernized during the past decade due to increased overseas studies and international travel; access to international TV; expansion of modern malls in big cities; dramatic growth in major international hotel and restaurant chains (including fast food); a significant number of western expatriates in urban areas; and dramatic growth in tourism (5.5 million international tourists in 2001).

- The peak business periods are during the holiday seasons when consumer spending increases. The most important holiday seasons are Ramadhan (the month-long Muslim fasting period in which food consumption goes up significantly), Lebaran or Idul Fitri (Muslim celebration of the end of the fasting), and Chinese New Year. Indonesians consume significantly greater amounts of flour, sugar, eggs, poultry, meat, cheese, cakes, cookies, pastries, fresh and dried fruits during these holiday periods.

- Even though Christmas is celebrated by less than 10 percent of the population, stores take advantage of the season and decorate and promote festive foods such as special fruits, sweets and pastries. Other western celebrations such as Valentine's Day, and U.S. Independence Day have also become trendy among upper-scale restaurants in Indonesia.

- The Indonesian consumer is very price conscious and susceptible to economic swings, with purchasing fluctuations occurring more in the middle and lower level income groups. Although the Indonesian consumer is traditionally loyal to brands, there are signs that brand loyalty is diminishing while "brand image" has become more important.

- More urban women are entering the workforce and choosing to stay there after marriage and children. With less time available for shopping and cooking, focus is increasingly on convenience.

- The number of household appliances for cooking is low. In urban areas, an estimated 31 percent of households have a refrigerators and only 5% in the rural area. Cooking with electric appliances occurs in only about 4 percent of urban households and 2 percent in the rural areas.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN INDONESIA	
Advantages	**Challenges**
Market scale - Indonesia has a population of around 212 million people.	Weak purchasing power of the majority of the population.
Around 10% of population is between 10-14 years of age. The majority are expected to participate in tomorrow's consumer market, or are already.	The Muslim population (88%) does not consume non-halal products.
Applied duties on food and agricultural products are 5 percent or less.	Import regulations are complex, often non-transparent, and require exporters to establish close business

	relationships with local importers/agents.
The distribution system on the island of Java is improving, providing increased access to a population of 124 million (58.65%).	Infrastructure, including ports and cold storage, facilities outside of the main island of Java are poorly developed.
A reputation for quality is the strongest selling point for U.S. food products.	Third-country competition remains strong, especially from Australia, New Zealand and the Europe. Food products from Malaysia, Philippines, Thailand and China is growing.
A stable currency, a direct result of improved economic and political situation, has made imported products more affordable to middle-income consumers.	Import financing remains a problem as Indonesia's banking system remains weak after the impact of the 1997 financial crisis.
Distribution and availability of imported products will be expanded by the rapid growth of the modern supermarket sector and western restaurant chains.	Important considerations are labeling regulations, including halal, and shipment sizes. U.S. companies need to work with U.S. consolidators and be prepared to send smaller quantities
Indonesia has a well-developed tourism industry with many hotel chains and restaurants purchasing imported products through local agents/importers.	In a cost-cutting measure, many hotels replaced much of their expatriate F&B staff with locally-hired staff. While most are well-qualified, they are unfamiliar with U.S. quality food products and tend to emphasize price over quality.
Indonesia is rich in natural resources, with multinational companies involved in the development of oil & gas, mining, and lumber. Some of the well-developed sites have commissary services with significant demand for imported products.	Sites tend to be in remote areas where transportation and lack of infrastructure presents barriers to cost-efficient distribution of imported food products.

SECTION II. EXPORTER BUSINESS TIPS

Business Customs

- While quality and price are important, they are secondary to the personal interaction of the business partners. Perhaps nowhere in the world is meeting face-to-face more important than in Indonesia.

- Visit the market to conduct market research, especially for product testing, price comparison, adjusting the product for local tastes, and understanding government regulations is critical. Meet the importers, distributors and retailers - they can help you with your market research.

- It is a good idea to start your research in Singapore where your product can easily move into the ASEAN region. Singaporean agents, importers, distributors and retailers are sophisticated and know the regional markets well. In addition, the shipping time is less and smaller shipment sizes can be sent into new markets from Singapore.

- Appoint one or several agents on a trial basis and provide them with incentives to get your product into the market. Support your agent by maintaining product quality. Educate the agent, the importer, the distributor, the retailer and the consumer about your product. This market for consumer-ready food products is relatively new and it should never be assumed that anyone knows how to promote, handle, and prepare your product.

· Be patient and think long term. It is not unusual to visit the market 2-3 times before details are finalized.

General Consumer Tastes and Preferences

- Lunch and dinner meals consists mainly of rice together with two or three meats/fish and vegetable dishes that are prepared according to the styles and tradition of various ethnic group. Religious affiliation affects food consumption. Muslims do not eat pork, and only eat meat products that have been certified halal as well as other domestically produced food items.

· When introducing new products, several factors should be kept in mind. Indonesian consumers have an aversion to low-quality products and are attracted to branded products. They also tend to be image conscious and very price sensitive. Brand loyalty is most likely to be broken by products that are of good quality, well packaged, well-distributed, well-promoted and competitively priced, rather than cheap products.

Food Standards and Regulation (FAIRS report ID0045)

· Have the agent register your product. According to Indonesian regulations, all products must be registered through the National Agency for Drug and Food Control (BPOM) to obtain an ML number. However, a significant percentage of the imported products on supermarket shelves are not registered and enter the market in mixed container loads. The registration process can be lengthy, bureaucratic and costly and generally requires a local agent or importer.

· Labeling and marking requirements: Regulations on food labeling are in place and the government is currently in the process of implementing new food labeling guidelines. Halal certification and labeling is not required at this time but these guidelines are also under review. Given that more than 88 percent of the population professes the Islamic faith, it is highly recommended that a *halal* certification be obtained

· All beef and poultry products must be certified halal and the products must originate from slaughterhouses which have been inspected and approved by Indonesian veterinary (DG Livestock) and religious authorities (MUI)

· Your product should be packed and shipped for a tropical climate, and have clear storage instructions. This is especially important as few cold storage or air-conditioned facilities and delivery trucks exist and sometimes stores turn off cold storage facilities at night to conserve energy.

General Import and Inspection Procedures

- Since April 1977, the Customs Directorate of the Ministry of Finance has operated a post – entry audit system, which relies primarily on verification and auditing rather than inspection to monitor compliance. The problems mostly are about the custom procedures and valuation made by the Indonesian Customs and mainly regarding the irregular and non-transparent fees required to get shipments released.

- Tariff and Import Taxes: Indonesia's bound tariff rates on major food and agricultural items generally range from 5 to 40 percent. Temporary tariffs, however, on all food items including high valued foods were cut to a maximum of 5 percent in February 1998 under an IMF agreement and remain in effect as of 2003. The major exception is the 170 percent duty applied to all imported alcoholic beverages.

- Other Taxes: The government levies a 10 percent value-added tax on the sale of all domestic and imported goods. A luxury tax ranging from 10 percent to 75 percent is also levied on certain products. For imports, these taxes are collected at the point of import and are calculated based on the landed value of the product, including import duties. Another tax is Sales tax (PPn) 2.5 %.

Others

- Take advantage of the services offered by the Agricultural Trade Office. We can provide a briefing in our office, provide reports and contact lists for your areas of interest, arrange hotel accommodations, and inform you of upcoming events such as U.S. food product shows and agent shows.

- The Southeast Asia Market Access Program sponsored by the Western U.S.A. Trade Association (WUSATA) and the Midwest Agricultural Trade Association (MIATCO) provides many services for a fee including store checks, competitive products shopping, distributor referrals, and in-market assistance. See Section V for contact lists of all Foreign Market Development (FMD or Cooperator) programs and Market Access Program (MAP) participants active in the food sector in Indonesia.

- ***Always remember, while quality and price are important, they are secondary to the personal interaction of the business partners. Perhaps nowhere in the world is meeting face-to-face more important than Indonesia.***

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

A. Retail Sector:

Market Overview

The retail industry has evolved significantly from poor traditional markets and modest kiosks to sophisticated hypermarkets and superstores. At present, many big retailers are engaged in major expansion projects. With the entrance of some foreign retail giants like Carrefour, Giant, Makro, and Lion Superindo (Delhaize group), competition in the Indonesian retail market has become very fierce.

Outlet type	Total	
	1997	2001
Supermarkets	579	814
Mini-markets	1,535	3,051
Large provision shops	58,791	59,055
Small provision shops (small "mom and pop")	362,001	599,489
Warung shop (stall)	1,509,498	1,241,193

Source: A.C. Nielsen

Outlet type	Contribution to national retail sales % (IDR value) (April to March period))			
	1999-2000	2000-2001	2001-2002	2002-2003
Supermarket/hypermarket	16.7	20.5	20.2	21.1
Minimarket	3.5	4.6	4.9	5.1

Source: A.C. Nielsen

USDmillion	2000	2001	2002 (est)	2005 (predicted)
Total retail Sales	2,800	3,502	3,852	8,400
Generated by Local Retailers	2,059	2,575	2,833	-
Generated by Foreign Retailers	741	927	1,019	-

Source: Castle Asia

Total food product imports for 2002 were US$ 3.3 billion, up from US$ 2.9 billion in 2001. Almost 30% of those products were imported as Processed Food and Beverages (included sugar and fruit), while the rest was consumed directly by end consumers or by food processors as ingredients (included rice and wheat). Consumption of imported processed food and beverages has risen to close to pre-crisis levels.

Terrorist events and political uncertainty in 2002/03 has reportedly had only a minimal impact on retail food sales. An exception is the specialty stores that carry a high percentage of imported items, which make them more susceptible to a decline in tourism and burdensome product registration requirements for imported food products.

Most supermarkets, hypermarkets, and warehouse outlets buy their imported products from distributors or agents. Some are importing direct from foreign suppliers, particularly perishable products. This trend is expected to expand in the near future. In general, new products and suppliers must be approved by the purchasing unit in headquarters in Jakarta. Subsequent orders may take place from individual stores, especially those outside of Jakarta. Delivery is to a central warehousing facility or individual stores.

Future Trends

In the near future, recently-developed patterns of consumer behavior are expected to continue growing (prefer shopping at the supermarket/modern outlet due to comfortable shopping space, a complete range of goods, guaranteed quality of products, competitive price, good service, and easy accessibility to the residents of the settlement area). Consumers are adjusting to paying higher prices for imported and local food products. They will remain very selective in their product purchases and will be looking for good quality products at low prices. Promotion will be important as consumers will be more fickle and there will be opportunities to replace traditional brands. There will be a growing concern with the nutritional aspects of food products.

Some retailers already offer a wide range of services to consumers, including the acceptance of credit/debit cards, ATM services, flower departments, laundry counters, food courts near shopping areas, automated banking services, and home delivery. Some anticipate these services will be reduced in the next five years in the interest of lower retail prices. A low-price or money-back guarantee is the main addition they see to retailers' service offerings. Others suggest that emphasis will be placed on increasing service quality and efficiency, rather than adding new services.

Future trends over the next five years include Ready-to-Cook and Ready-to-Eat foods due to modern life styles, both parents work, and international exposure.

Entry Strategy

The best way to penetrate the Indonesian market is to select an agent. In general, the volume of imported product sales is small. An agent is needed to assure the widest distribution for your products as well as to undertake the marketing efforts necessary to create awareness for your products among consumers as well as to register your products (ML number) with the National Agency for Drug and Food Control.

In some situations, it may make sense to sell your product directly to supermarkets and/or to appoint them as the exclusive distributors. This is primarily the case when your product is a gourmet, upscale product and not likely to generate sufficient volume to interest an agent in bringing in container loads or the retailers has sufficient outlets for supplying the products or fresh fruit. Nevertheless, your initial sales efforts to Indonesia should include both visits with potential agents as well as with key retailers.

Best Market Prospects

Best market prospects for U.S. suppliers include fresh fruit, beef offal, frozen french fries, sauces & seasonings, canned foods, frozen vegetables, salad dressings, and snack foods. Niche markets exist for frozen pizzas, frozen meat & poultry, delicatessen items, biscuits, confectioneries, breakfast cereals, tomato paste, cooking/salad oils, and non-alcoholic beverages.

Further Information

For a more detailed assessment of the Indonesia retail food sector, please see: *Indonesia, Market Development Report, Retail Sector Report 2002*. Information on how to access this report is available under Section V.

B. HRI Food Service Sector

Market Overview

The Hotel, Restaurant, and Institutional (HRI) industry in Indonesia is extremely diverse. It consists of hotels, restaurants that serve local and Western food (Cafés become a trend at the moment), fast food outlets, and clubs. Small restaurants, street stalls known as warungs, and hawkers that sell food to customers on the street comprise the majority of retail outlets. Catering operations service airlines, factories, and private social functions. Cruise and military ships, mining and oil operations, prisons, and hospitals are also a part of this sector.

It is estimated that only 10-20 percent of the food items purchased by the HRI trade are imported products. The majority of imported products are sold to four and five-star hotels and up-scale restaurants that sell Western food. A significant volume of imported items is also sold to Western fast food outlets, but the variety is limited. Approximately 60 percent of imported food items are estimated to move through the hotel and restaurant sector. Caterers and institutional users account for the remaining 40 percent

There are around 7,000 hotels (125,000 rooms) in Indonesia, and 1,037 of those hotels (31,944 rooms) are in Bali. It comprises 7.7 percent five star hotels, 14.8 percent four stars, 23.8 percent three star, and the rest below three star hotels. Most of the three star hotels and above are owned by international and domestic hotel chains. Bali itself also has 726 restaurants.

Away-from-home eating is a very common activity across all levels of income earners. For various reasons, the custom is gaining acceptance all over Indonesia. Apart of the basic reason such as lunching at work, the change in lifestyle and income levels has also become major driving force behind the trend. For a few, eating out as a family activity, is done every weekend.

Future Trends

Last year's terrorist attacks in Bali, other terrorist events, and the SARS outbreak in Asia, continue to have an adverse and lingering affect on the HRI industry in Indonesia. The Indonesian Ministry of Tourism estimates continued sluggishness in foreign visitors in near term, but remains optimistic that tourist levels will rebound in 2004. This has led many in the HRI sector to focus more on Indonesian customers, leading to a more price conscious consumer.

In 2003, the Revenue from Hotel and Restaurant sector is estimated as amount of IDR 2.3 trillion (USD2.7 million) about 49 percent below 2000 revenue (IDR4.5 trillion). This is the accumulative impact of SARS, the Bali bombing, the Mariott Hotel bombing in Jakarta, and travel warning announced by several countries, including the United States.

The customer base for most of the HRI trade is expected to shift to an even higher percentage of Indonesian customers, in contrast to the high percentage of expatriate customers in pre-crisis years. The expansion of the franchise restaurants (including fast food), casual dining café's, international and family style restaurant, and food court is expected to increase imported food consumption.

Entry Strategy

A U.S. exporter that is interested in selling to the HRI trade in Indonesia should look for a reputable importer/distributor to represent their products. These companies have the import licenses and knowledge of customs clearance procedures that are required to successfully bring in products. They will also have the capability to be in a position to ensure the widest distribution for your items.

Despite the downturn this year, Jakarta and Bali remain the ideal locations to target in your market entry efforts. These cities have a sizeable HRI trade, which consist of 5-star hotels and upper-scale restaurants. They also have sizeable expatriate communities and a large numbers of foreign visitors that seek imported food products.

Best Market Prospects

Best market prospects for U.S. suppliers include U.S. beef, beef liver, and prime rib; duck and turkey; french fries; pastry products; sauces and seasonings; oil and vinegars; cereals; canned seafood and canned food; snack for hotel bars and room service; reasonably-priced wines; fresh fruits; liquor; beer; soft drinks, and juices; tortillas and Mexican products; tree nuts; and ice cream.

Further Information

For a more detailed assessment of the Indonesia retail food sector, please see: *Indonesia, Market Development Report, HRI Food Service Sector Report 2003*. Information on how to access this report is available under Section V.

C. Food Processing Sector

Market Overview

Indonesia offers significant market potential for U.S. suppliers of food and agricultural ingredients into the local food processing sector. Indonesian's food and beverage processing industry is worth over US$ 10 billion, and is comprised of 4,681 businesses, ranging from family owned business to multinational companies, and over 900,000 traditional home industries. Processed food sales in 2002 grew approximately 15%, reaching sales of over IDR. 61,000 billion (US$ 6.67 billion). Unfortunately, inflation played a significant role in driving up current value growth. Thus, in constant terms, the food processing sector was estimated to have grown by only 5% last year. Price increases for electricity, telephones, rice, and other basic necessity items in 2002 drove up end product prices.
Consumer sophistication, growing health consciousness, the introduction of new food products, and growth of modern retail outlets should lead to positive growth in the food-processing sector over the next five years, although political and security uncertainties are continuing to inhibit economic growth. Growth is expected to range from 4-11% in volume terms and increase by close to 8% in value terms.

Entry Strategy

Inputs for food processing can be categorized as follows:

- Primary materials such as frozen boned beef, wheat or skimmed milk powder.
- Essential complementary ingredients such as flavoring or preservatives.

Primary materials are most commonly imported directly by the food processor. Complementary ingredients are usually bought from a local importing agent because they are used in smaller quantities and often have limited shelf life.

Some "local suppliers" are agents in Singapore, which some producers find useful as a regional distribution point. Food processors buy from local agents in some cases because the agent has an exclusive sales agreement. Some companies would import directly if an alternative source were located.

Many multinational food processors operating in Indonesia must follow global product specifications. These companies have central purchasing offices, often in the U.S. or in Europe The range of products represented in the industry makes recommendation of one strategy difficult.

Generally applicable principles are as follows:

? Personal contact and local representation is essential if a permanent presence in the market is envisaged.

? Local representation requires careful and detailed research to confirm claims. Prospective representatives who claim connections to important people should be treated with extreme caution. Such connections are not necessary - commercial acumen is greater value in the market than "good connections".

? Do not make any commitment to grant exclusive rights to a product before gaining experience of a prospective representative's capabilities.

? Pay attention to accounting standards applied in the preparation of reports supporting the financial standing of candidate representative's or partners.

Investment Trends

Foreign investment in the food processing sector is increasing as a result of liberalized investment regulations and the need for new capital during the ongoing economic crisis. A further consideration is the establishment of the AFTA trade zone giving favored treatment to regional production. Each of the following U.S.-based corporation operation's in Indonesia exports to the region using their world brand names: Heinz - PT. Heinz ABC Indonesia; Campbells Soups - PT. Arnott's Indonesia (via Australian subsidiary); and Nabisco - PT. Nabisco Foods.

European investment is strongest in the dairy foods industry with Nestle, Freische-Foremost and Nutricia all long standing participants. Japanese investment in the sector does not match its standing in other Indonesian manufacturing industry.

Consumption Trends

Significant growth potential exists in this sector for U.S. food ingredients. Indonesia will follow the economic model of shifting towards increased consumption of processed foods as the economy develops and the population becomes more urban. Indonesian people spent about 60% of total expenditure for food. Out of that 60%, only 25% is spent for processed food & beverages, or about U$ 8.55 billion annually, of which US$ 6.67 billion was for processed food.

Yet, post crisis, processed food industries are facing changing consumer profiles. There are a growing number of more sophisticated, critical, and educated consumers. Consumers are increasingly familiar with fortified food, ie products with added vitamins and minerals in milk, biscuits and ice cream. These sophisticated consumers gained knowledge not only from living, studying, and working abroad but also from the media. However, the majority of consumers remain price-conscious. When product offerings are similar, price is the determining factor.

To address price concern smaller pack sizes and no frill products and cost are being reduced to lead to more affordable products.

In contrast, relatively new categories, such as ready meals, meal replacement drinks, and snack bars have limited potential. Many consumers are unaware of these products and since the price is expensive, the penetration rate remains low. Ready meals will not be a necessity since affordable ready-to-eat or cooked food is available at eating outlets of all sizes throughout Indonesia.

Best Market Prospects

Best market prospects include wheat flour based food products as the alternate of Indonesian staple food in the form of noodle and baked goods, food-use soybeans, beef, dairy products, flavorings, processed poultry products, processed potato products, fruit concentrates, bakery ingredients, and peas & lentils.

Further Information

For a more detailed assessment of the Indonesia retail food sector, please see: *Indonesia, Market Development Report, Food Processing Sector Report 2003.* Information on how to access this report is available under Section V.

D. Distribution System

Due to the widespread and diverse nature of the country, involving hundreds of islands, this system is complex. In many cases, the infrastructure is insufficient, especially outside big cities and Java island. The ability to move frozen and refrigerated products is limited. There are approximately 10 national distributors who service the whole country and numerous agents/distributors with a more local reach. There are hundreds of wholesalers and millions of retailers.

A World Bank study indicated that inadequate ports were the single largest and most consistent complaint in every province and with all levels of the distribution system. The most frequent criticisms cited in the report concerned shallow drafts in ports requiring small ships and inadequate loading and unloading facilities resulting in frequent congestion. Also cited by distribution firms are the unreliable shipping schedules and inadequate number of small ships serving Eastern Indonesia, particularly during bad weather periods - which results in frequent shortages and leads firms to hold higher than desired inventories, with higher costs.

Imported products that enter the Indonesian market often move to a distributor or agent, who in turn, sells them directly to modern retail outlets. Delivery of the products may be direct to stores or to the warehousing facilities of the retailer. Only a few retailers buy directly from foreign suppliers and assume responsibility for the logistics function. Major food processors tend to buy directly while smaller operations tend to buy through local agents.

The trade in fresh fruit differs from that of other consumer-ready food products. Fresh fruit imports are dominated by trading houses that specialize in fruit, whereas other food items are widely traded. For example, it is not unusual for one importer to carry such items as meat, poultry, french fries, and confectionary ingredients and deliver them directly to the retailer. On the other hand, fresh fruit will change hands several times before reaching the consumer, usually at the wet market or curbside fruit stands.

Restaurants and retailers alike frequently complain about the poor distribution system. Their complaints center around getting a consistent supply of quality food products. Sometimes distributors sell outdated products that they purchased inexpensively or a frozen product was not stored correctly and has been refrozen. In addition, they complain about the large number of distributors they must deal with since most of the distributors carry only a handful of products or carry a limited supply.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Best market prospects imported product, as identified by the Agricultural Trade Office in Jakarta based on Central Bureau Statistics data are as follows:

HS Code	Description	2000 (value USD)	2001 (value USD)	2002 (value USD)

		World	US origin	World	US origin	World	US origin
0808	Apple,pears & quinces, fresh	64,144,492	21,900,314	73,295,303	25,220,211	108,514,279	31,881,174
0806	Grapes, Fresh or Dried	11,685,743	7,064,034	10,495,234	5,472,058	19,567,407	10,258,409
0206	Edible Offal of Bovine Animals, Swine, Sheep, Goats, Horses Etc, fresh, Chilled or Frozen	20,825,785	7,462,676	16,686,262	5,043,782	22,830,634	7,227,814
0402	Milk & Cream, Consentrated or Containing Added Sweetening	186,096,719	5,385,713	240,505,492	27,606,331	167,160,281	5,433,934
210690	Food Preparation Nesoi	34,387,379	2,884,359	43,411,018	3,684,424	47,706,843	4,418,767
0404	Whey & Other Products Consisting of Natural Milk Constituents Nesoi, Whether or not Concentrated or Sweetened	15,967,025	3,199,586	20,305,349	3,103,844	21,248,641	3,226,189
0710	Vegetable (uncooked or Cooked by steam or boiling water), frozen	4,518,888	3,859,048	4,380,869	3,214,950	4,985,873	2,873,532
350400	Peptones & Derivatives; Other protein & Derivatives, Nesoi; Hide Powder, Chromed or not	4,294,855	2,568,698	4,475,593	2,086,186	6,278,882	2,431,628
200410	Potatoes, Including French Fries, Prepared or Preserved Otherwise than by Vinegar or Acetic Acid, frozen	3,792,525	1,908,434	5,311,458	1,325,385	6,177,511	2,257,219
110520	Flakes, Granules & pellets of Potatoes	704,358	570,383	1,520,328	1,233,195	2,146,403	1,798,578
0202	Meat of Bovine Animals, frozen	39,575,322	1,333,263	22,791,617	1,324,041	17,864,262	1,228,480
210610	Protein Concentrates & Textured Protein Substances	3,179,969	889,369	4,602,939	1,431,757	2,906,130	1,217,953
230910	Dog & Cat Food, Put up for Retail Sale	1,986,039	944,232	3,219,441	1,506,038	3,716,090	1,201,178
0805	Citrus Fruit, Fesh or Dried	41,948,401	2,287,065	40,243,452	1,036,590	51,440,420	1,166,159
0407	Birds' Eggs, in the shell, Fresh, Preserved or Cooked	3,312,001	164,226	745,256	219,574	1,665,065	781,801
0802	Nuts Nesoi Fresh or Dried	1,549,559	1,134,585	1,088,106	671,040	1,168,931	765,279
0406	Cheese & Curd	11,781,270	84,917	14,379,406	528,560	15,623,425	719,588
2101	Extract, Essences & Consentrates of Coffee, Tea or Mate & preparation thereof; Roasted Chicory etc & Extract, Essences & Consentrates	1,049,632	204,916	2,345,645	626,396	1,954,202	599,163

Country of origin:

HS Code	Description	Major Suppliers		
		2000	2001	2002
0808	Apple,pears & quinces, fresh	China (48%) US (34%)	China (52%) US (34%)	China (59%) US (29%)

		Others: Australia, France, New Zealand, Canada, South Korea	Others: Australia, France, New Zealand, Canada, South Korea	Others: Australia, France, New Zealand, Canada, South Korea
0806	Grapes, Fresh or Dried	US (60%) Australia (20%) Others: Chile	US (52%) Australia (34%) Others: Chile, South Africa	US (52%) Australia (35%) Others: China, South Africa
0206	Edible Offal of Bovine Animals, Swine, Sheep, Goats, Horses Etc, fresh, Chilled or Frozen	Australia (9%) US (36%) New Zealand (14%)	Australia (48%) US (30%) New Zealand (18%)	Australia (47%) US (32%) New Zealand (17%) Others: Canada
0402	Milk & Cream, Concentrated or Containing Added Sweetening	New Zealand (44%), Australia (13%), Netherlands (9%) Philippines (7%), Germany (7%), Ireland (6%), Belgium (3%), US (3%)	New Zealand (36%), Australia (17%), US (11%), Netherlands (9%), Philippines (9%), Denmark (4%) South Africa (2%)	Australia (28%) New Zealand (27%) Netherlands (14%) Philippines (9%) US (3%)
210690	Food Preparation Nesoi	Netherlands (48%) South Korea (9%) US (8%) Malaysia (7%) Thailand (4%) UK (4%) Japan (3%)	Netherlands (50%) South Korea (9%) US (9%) Malaysia (8%) Thailand (6%) Australia (3%) Ireland (3%)	Netherlands (49%) South Korea (12%) US (9%) Malaysia (8%) Thailand (5%) Philippines (3%) Australia (2%)
0404	Whey & Other Products Consisting of Natural Milk Constituents Nesoi, Whether or not Concentrated or Sweetened	Australia (43%) US (20%) France (12%) Netherlands (11%) Finland (7%)	Australia (32%) France (20%) US (15%) Netherlands (11%) Ireland (7%) New Zealand (5%)	Australia (32%) France (19%) US (15%) American Samoa (10%), Netherlands (9%), Ireland (5%)
0710	Vegetable (uncooked or Cooked by steam or boiling water), frozen	US (85%) Australia (6%)	US (73%) Netherlands (10%) Australia (8%)	US (58%) Canada (10%) Singapore (9%) New Zealand (8%) Australia (5%) Netherlands (5%)
200410	Potatoes, Including French Fries, Prepared or Preserved Otherwise than by Vinegar or Acetic Acid, frozen	US (50%) Canada (38%)	US (25%) Canada (50%) Malaysia (16%)	US (37%) Canada (34%) Malaysia (22%)
350400	Peptones & Derivatives; Other protein & Derivatives, Nesoi; Hide Powder, Chromed or not	US (60%) Netherlands (14%) Germany (9%)	US (47%) Netherlands (28%) Brazil (13%)	US (39%) Netherlands (29%) Brazil (14%) UK (4%)
110520	Flakes, Granules & pellets of Potatoes	US (81%) Canada (18%)	US (81%) Canada (16%)	US (84%) Germany (7%)
0202	Meat of Bovine Animals, frozen	Australia (44%) Ireland (30%) New Zealand (21%) US (3%)	Australia (43%) New Zealand (30%) Ireland (20%) US (6%)	Australia (66%) New Zealand (27%) US (7%)
210610	Protein Concentrates & Textured Protein Substances	US (30%) China (12%) Malaysia (11%) Netherlands (10%)	US (31%) Canada (31%) China (10%) Brazil (8%)	US (42%) Netherlands (12%) Japan (10%) China (9%)

		Brazil (9%) Germany (8%) Japan (7%)	Netherlands (7%)	Australia (7%) South Korea (6%) Brazil (5%) Malaysia (4%)
230910	Dog & Cat Food, Put up for Retail Sale	US (48%) Australia (23%) Singapore (16%) Thailand (8%)	US (47%) Australia (29%) Thailand (19%)	US (32%) Australia (32%) Thailand (25%)
0805	Citrus Fruit, Fresh or Dried	China (49%) Pakistan (18%) Australia (15%) US (5%) Egypt (3%) Brazil (3%)	Pakistan (36%) China (35%) Australia (12%) Brazil (5%) Egypt (4%) US (3%)	China (41%) Pakistan (25%) Australia (13%) Brazil (8%) Egypt (3%) South Africa (3%) US (2%)
0407	Birds' Eggs, in the shell, Fresh, Preserved or Cooked	Netherlands (67%) France (9%) Germany (6%) US (5%)	US (29%) Malaysia (24%) Germany (21%)	US (52%) Netherlands (13%) Malaysia (12%) Thailand (12%)
0802	Nuts Nesoi Fresh or Dried	US (73%) Australia (15%) China (7%)	US (73%) Australia (18%)	US (65%) Australia (21%)
0406	Cheese & Curd	Australia (62%) New Zealand (31%) Netherlands (3%)	Australia (57%) New Zealand (33%) US (4%)	Australia (59%) New Zealand (28%) US (5%)
2101	Extract, Essences & Concentrates of Coffee, Tea or Mate & preparation thereof; Roasted Chicory etc & Extract, Essences & Concentrates	Malaysia (40%) US (20%) Brazil (14%) Netherlands (9%) Singapore (9%)	US (27%) Malaysia (21%) Indonesia (19%) China (9%) Netherlands (9%)	US (31%) Malaysia (22%) Brazil (12%) Columbia (7%) Netherlands (6%)

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Government of Indonesia Contacts for Food & Beverage Control				
Organization	**Contact Person**	**Address**	**Phone**	**Fax**

POM (National Agency for Drug and Food Control)	Drs. Sampoerno, Head	Jl. Percetakan Negara 23, Jakarta Pusat, Indonesia	62-21-424-4688; 424-3605	62-21-425-0764
Department of Agriculture-Directorate General for Animal Husbandry	Drh. Sofjan Soedradjat, MS, Director	Jl. Harsono R.M. No.3, C Bld, 6th Floor, Jakarta 12550, Indonesia	62-21-781-5580	62-21-781-5581
Department of Agriculture-Quarantine Agency	Drh. Sofjan Soedradjat, MS, Head	Jl. Pemuda No. 64, Kav 16-17, Jakarta Timur, Indonesia	62-21-489-4877	62-21-489-4877; 489-2016
Indonesian Trade Association Contact List				
APRINDO (Indonesian Retail Merchants Association)	Mr. Handaka Santosa, Secretary General	E-Trade Building, 3rd Floor, Jl. Wahid Hasyim No.55. Jakarta 10350, Indonesia	62-21-315-4241; 392-8545	62-21-323-267
ASIBSINDO (Indonesian Fruit & Vegetables Importers Association)	Mr. Yusnan Chandra, Chairman	Jl. Kramat Kwitang IB No. 17, Jakarta, 10420, Indonesia	62-21-3190-6574	62-21-3190-6574
ASPIDI (Association of Indonesian Meat Importers)	Mr. Thomas Sembiring, President	Jl. Ciputat Raya No. 351, Kebayoran Lama, Jakarta 12240	62-21-7279-3417 & 7279-3409	62-21-7279-3419 asp_1984@cbn.net.id
Indonesian Fish Cannery Association	Hendri Sutandinata, MBA, Chairman	Jl. Cipinang Indah Raya No. 1, Jakarta 13420, Indonesia	62-21-819-6910	62-21-850-8587
IPS (Dairy Processor Assocaition)	Mr. Sabana , Director & Ms. Debora Rukmawati (Secretary)	Wisma Nestle. Arcadia Office Park, Jl. Letjen T.B. Simatupang Kav 88, Jakarta 12520	62-21-7883-6000	62-21- 7883-6001
AIMMI (Indonesian Food & Beverage Importer Association)	Mr. Mario Waas, Secretary General	Grand Boutique Center, Block C-8, Jl. Arteri Mangga Dua, Jakarta 14430, Indonesia	62-21-612-2667; 628-0710	62-21-626-1351 mario_waas@telkom.net

U.S. Cooperator and MAP Participants				
Organization	**Contact Person**	**Address**	**Phone**	**Fax**
AgriSource Co., Ltd Regional representative for USA Dry Peas,	Tim Welsh, Managing Director	Ambassador's Court, 4th Floor, No. 416, 76/1 Soi Lang	(66-2) 251-8655 /6	(66-2) 251-0390 E-mail:

U.S. Cooperator and MAP Participants				
Organization	**Contact Person**	**Address**	**Phone**	**Fax**
Lentils & Chickpeas		Suan, Ploenchit Road, Bangkok, Thailand 10330		agsource@loxinfo.co.th
Lieu Marketing Assoc. Pte. Ltd Regional representative for: California Pistachio Commission, California Table Grape Commission, California Tree Fruit Agreement, Pear Bureau Northwest, Raisin Administrative Committee, United States Potato Board, Wine Institute of California, FMI	Richard Lieu, Director	# 08-22 Block 3, Alexandra Distripark, Pasir Panjang Road, Singapore 118483	65-6278-3832	65-6278-4372 E-mail: gabaric@singnet.com.sg
Peka Consult, Inc. Country representative for Washington Apple Commission, California Table Grape Commission, California Pear Bureau, Sun-maid raisin, Sunkist Pistachious,	Kafi Kurnia, Leonard Tjahjadi, Dian Mediana	Jl. Kemang Raya No. 1, Jakarta, Indonesia 12160	(62-21) 721-1358	(62-21) 721-1357 E-mail: peka@indo.net.id
PT Swaco Prima Windutama Country representative for U.S. Grain Council and American Soybean Association	A. Ali Basry, Director	Wisma Mitra Sunter # 402 Blok C-2, Boulevard Mitra Sunter, Jl. Yos Sudarso Kav 89, Jakarta, Indonesia 14350	(62-21) 651-4752	(62-21) 651-4753 E-mail: asagrain@indosat.net.id
PacRim Assoc. Ltd Regional Representative for the U.S. Dairy Export Council	Dan Fitzgerald, Director	11/14 Soi Ruam Council, Wireless Road, Bangkok 10330	(66-2) 689-6311	(66-2) 689-6314 E-mail: usdec@pacrim.co.th
U.S. Meat Export Federation	Eric Choon, Asean Director	39 Tyrwhitt Road, 3rd Floor Suite, Singapore 207538	65-6733-4255/6	65-6732-1977 E-mail: echoon@usmef.com.sg
USA Poultry & Egg Export Council	Margaret Say Regional Director	# 15-04 Liat Towers, 541 Orchard Road, Singapore 238881	(65) 6737-1726	(65) 6737-1727 E-mail: usapeec_sing@pac

U.S. Cooperator and MAP Participants				
Organization	**Contact Person**	**Address**	**Phone**	**Fax**
				ific.net.sg
U.S. Wheat Associates	Mark Samson Vice President for South Asia	# 15-02 Liat Towers, 541 Orchard Road, Singapore 238881	(65) 6737-4311	(65) 6737-9359 E-mail: msamson@uswheat.org
American Soybean Association	John Lindblom Regional Director	#11-03 Liat Towers, 541 Orchard Rd., Singapore 238881	(65) 6737-6233	(65)6 737-5849 E-mail: asaspore@pacific.net.sg
U.S. Grains Council	Suresh Chandran, technical Director	Regional DirectorWisma SOCFIN, Peti Surat #06 Tingkat Tiga, Jl Semantan 50490 Kuala Lumpur	(60-3) 255-9826	(60-3) 256-2053 E-mail: suresh@usgc.com.my

POST CONTACT AND FURTHER INFORMATION

The U.S. Agricultural Trade Office in Jakarta maintains up-to-date information covering food and agricultural import opportunities in Indonesia and would be pleased to assist in facilitating

U.S. exports and entry to the Indonesia market. Questions or comments regarding this report should be directed to the U.S. ATO in Jakarta at the following local or U.S. mailing address:

U.S. Commercial Center
Wisma Metropolitan II, 3rd Floor
Jalan Jenderal Sudirman Kav.29-31
Jakarta 12920 - Indonesia
Tel: +62 21 526 2850
Fax: +62 21 571 1251
e-mail:atojkt@cbn.net.id
ATO Jakarta
Home Page:http://www.usembassyjakarta.org/fas

U.S. Agricultural Trade Office
U.S. Embassy-Jakarta
Box 1, Unit 8129
FPO AP 96520-0001

Please contact our home page for more information on exporting U.S. food products to Indonesia, including “Hotel and Restaurant Industry: Bali”, “Market Brief: Imports of U.S. Fresh Fruit: Indonesia”, Market Brief: " Indonesian Meat Processing Industry", "Market Brief - Indonesian Bakery Industry", Market Brief - Indonesian Beverage Industry", "Market Brief - Beef Liver & Chicken Leg Quarter in Indonesia", "Market Brief-Furniture Industry in Indonesia", Product Brief - Popcorn. As of 2003, the following updated reports are available;” HRI Sector Report”: Indonesia, “Food Processing Sector Report: Indonesia”, and "Retail Sector Report: Indonesia".

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service’s Home Page: http://www.fas.usda.gov

EXPORTER GUIDE:
APPENDIX I. STATISTICS

A. KEY TRADE INFORMATION FOR INDONESIA

Item	Import from the World (million)			U.S. Market Share (%)		
	2001	2000	1999	2001	2000	1999
Agricultural Products	4,145	4,165	4,544	29	17	14
Consumer-Oriented Agr.	849	818	483	12	11	11
Fish & Seafood Products	31	37	25	7	2	2

Demographic Information: Indonesia			
Total Population (million) in 2002	212	Annual Growth Rate in 2002	1.49%
Urban Population (million) in 2002	90	Annual Growth Rate in 2002	Na
Number of major Metropolitan Areas	10		
Size of the Middle Class (millions) in 2002	32	Growth Rate in 2002	na
Per Capita Gross Domestic Product in 200	USD871		
Unemployement Rate in 2002	6.5%		
Per Capita Food Expenditures in 2002*	USD509		
Percent of female Population Employeed	37%		
Exchange Rate (US $ 1= X.X. local currency)	See below		

Footnote : * = 58.47% of Income per Capita, US $1=IDR 10,400

Exchange Rate (Rp/US $) on Month Ending Basis

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	2387	2403	2418	2443	2458	2450	2528	2190	3350	3700	3740	5700
1998	13513	9377	8740	8211	10767	15160	13850	11700	11314	9142	7755	8100
1999	9419	8992	8778	8632	8179	6750	6989	7736	8571	6949	7439	7161
2000	7414	7517	7598	7988	8728	8742	9055	8370	8891	9493	9524	9385
2001	9488	9914	10460	11675	11375	11440	11312	8670	9675	10435	10430	10200
2002	10383	10222	9779	9441	9823	8741	9171	8938	9057	9233	8976	8940
2003	8876	8905	8908	8675	8279	8285	8505	8535	8500			

B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORT

Indonesia Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
(In Millions of Dollars)	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED AGRICULTURAL TOTAL	483	818	849	51	86	100	11	11	12
Snack Foods (Excl. Nuts)	9	19	20	1	1	1	2	2	2
Breakfast Cereals & Pancake Mix	3	6	5	1	1	1	7	11	10
Red Meats, Fresh/Chilled/Frozen	22	63	41	2	9	6	8	14	15
Red Meats, Prepared/Preserved	1	2	2	1	1	1	14	8	11
Poultry Meat	3	10	1	2	8	1	71	79	62
Dairy Products (Excl. Cheese)	126	253	317	12	10	32	9	4	10
Cheese	8	12	14	1	1	1	0	1	4
Eggs & Products	8	5	2	1	1	1	6	6	12
Fresh Fruit	56	135	140	15	31	32	28	23	23
Fresh Vegetables	59	64	73	1	1	1	2	0	1
Processed Fruit & Vegetables	17	30	29	7	13	12	41	43	42
Fruit & Vegetable Juices	3	4	5	1	1	1	4	6	9
Tree Nuts	1	2	1	1	1	1	34	53	51
Wine & Beer	2	1	2	1	1	1	24	12	6
Nursery Products & Cut Flowers	1	1	1	1	1	1	5	2	3
Pet Foods (Dog & Cat Food)	2	2	3	1	1	2	45	46	47
Other Consumer-Oriented Products	162	208	192	9	11	12	6	5	6
FISH & SEAFOOD PRODUCTS	25	37	31	1	1	2	2	2	7
Salmon	1	1	2	1	0	1	1	0	2
Surimi	1	1	1	0	0	0	0	0	0
Crustaceans	11	12	11	1	1	1	2	3	11
Groundfish & Flatfish	3	6	4	1	1	1	1	2	5
Molluscs	4	6	6	1	1	1	0	3	5
Other Fishery Products	5	12	8	1	1	1	4	1	7
AGRICULTURAL PRODUCTS TOTAL	4544	4165	4145	636	724	1197	14	17	29
AGRICULTURAL, FISH & FORESTRY TOTAL	4663	4329	4283	682	783	1251	15	18	29

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting: Indonesia - Top 15 Ranking

(1000$)	Import 1999	Import 2000	Import 2001
New Zealand	44,001	121,356	130,334
China (Peoples Repu	53,832	102,673	116,445
Australia	75,658	104,206	110,297
United States	51,151	86,193	99,877
Netherlands	39,884	58,066	62,165
Thailand	39,907	59,944	61,432
Philippines	4,626	22,851	32,482
Malaysia	28,349	17,421	25,368
Singapore	17,731	23,133	23,596
Germany	8,654	21,382	19,897
Denmark	4,668	10,761	16,632
France	7,303	14,443	15,226
Pakistan	3,283	7,744	14,947
Ireland	5,870	29,584	14,625
Madagascar	11,249	44,522	9,578
Other	86,620	93,982	95,814
World	482,838	818,306	848,778

FISH & SEAFOOD PRODUCTS - 700

Reporting: Indonesia - Top 15 Ranking

(1000$)	Import 1999	Import 2000	Import 2001
Japan	2,384	3,010	4,223
India	3,621	2,014	2,548
Taiwan (Estimated)	4,045	4,732	2,439
Singapore	1,111	2,462	2,433
China (Peoples Repu	1,573	3,538	2,348
Free Zones	0	0	2,332
United States	514	655	2,253
Malaysia	848	1,503	2,129
Thailand	490	1,620	1,918
Australia	779	1,214	1,484
Korea, Republic of	1,052	3,934	1,353
Netherlands	418	895	752
Burma	316	192	667
Germany	2,080	4	619
United Kingdom	377	459	580
Other	5,638	10,518	3,023
World	25,261	36,762	31,095

Source: United Nations Statistics Division

EXPORTER GUIDE
APPENDIX II: CALENDAR OF TRADE SHOWS IN INDONESIA

Name of Event	FOOD, HOTEL & TOURISM BALI
Event Location	Bali International Convention Center, Nusa Dua - Bali, Indonesia
Industry them	The 4th International Exhibition for Equipment, Food, Beverages and Services to Support Indonesia's Tourism and Hospitality Industries; The 2nd International Retail Technology
Date of Event	February 5-7, 2004
Type of Event	International Exhibition
Name of Organizer	PT Pamerindo Buana Abadi
Phone of Organizer	(62-21) 316-2001
Fax of Organizer	(62-21) 316-1983/4
E-mail of organizer	wiwiek@pamerindo.com
Web site	www.pamerindo.com

Name of Event	FOOD & HOTEL INDONESIA 2005
Event Location	Jakarta International Exhibition Center, Kemayoran, Indonesia
Industry theme	The 8th International Hotel, Catering Equipment, Food and Drink Exhibition; The 3rd International Retail Technology
Dates of Event	April 6-9, 2005
Type of Event	International Exhibition
Name of Organizer	P.T. Pamerindo Buana Abadi
Phone of Organizer	(62-21) 316-2001
Fax of Organizer	(62-21) 316-1983/4
E-mail of Organizer	wiwiek@pamerindo.com
Web site	www.pamerindo.com