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Snack Food Ingredient

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Product Brief

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Report Highlights:

In recent years, the Indonesian snack food industry has successfully targeted its core demographic, an estimated 82 million Indonesian children and teenagers. As more and more Indonesian families enter the middle class and have greater access to disposable income, FAS Jakarta predicts that the snack food industry will continue to grow at an annual rate of twenty percent over the next five years. Imports of snack food ingredients are expected to grow at an annual rate of 20 – 25 percent over the next several years. Significant opportunities exist for U.S. snack food ingredient suppliers in Indonesia. There is considerable potential for dairy ingredients such as skim milk, sweet whey, full cream, anhydrous milk fat, lactose, demineralized whey, butter, cheese powder, and cream cheese. Other ingredients in high demand include non-GM corn starch/powder/granules, potato starch, soy lecithin, emulsifiers, and premixed vitamins. U.S. ingredient exporters will also have significant opportunities in supplying healthy snack ingredient products, to include vitamins, enzymes, WPC 50 and 60, and dried fruits.

Executive Summary:

According to the Indonesian Central Bureau of Statistics (BPS), there are about 6,300 registered medium and large scale food and beverage enterprises in Indonesia. In 2008, these businesses recorded 56.8 billion dollars (BPS) in sales. In 2009, production increased by eight percent to 61.8 billion dollars and was forecasted to increase another 10 percent to 67.4 billion dollars in 2010. In general, the industry expects an average of 20 percent annual growth over the next five years. The leading Indonesian snack food manufacturer has reported a 29 percent increase in total sales from 2008 to 2009 (Indofood Annual Report 2009).

Table 1: Productions of Medium and Large Bakery and Snack Industries

Year	Bakery (Million Dollars)	Sweet & Savory Snack (Million Dollars)	Traditional Snack & Others (Million Dollars)	Total Value (Million Dollars)	Number of Registered Companies Surveyed
2005	96.99	298.63	169.34	563.96	553
2007	157.52	296.19	294.74	481.88	728

Sources: "Large and Medium Manufacturing Statistics Vol. III, 2005," and "Large and Medium Industrial Statistic – Production 2007" of Center of Bureau Statistic (BPS), Jakarta-Indonesia

Several medium and large scale Indonesian snack food manufactures have merged over the past several years. The results of these mergers include lower production costs, and an increased use of more modern manufacturing methods and equipment. This has ultimately led to higher quality, more consistent products that are less expensive for consumers. Also, large scale Indonesian snack food manufacturers are developing more creative ways to compete with imports in the domestic market. Medium and large scale snack food manufactures generally use between 20 percent and 40 percent of imported ingredients. The remaining ingredients generally consist of locally sourced products.

General Information:

Market Situation

In 2007, BPS reported a total production of *chiki* snacks with the value of 37.88 million dollars (5,785 tons), corn chips of 2.57 million dollars, and potato chips of 826,744 dollars. Currently, they are fifteen large-scale snack manufactures in Indonesia. About six of these companies are manufacturing savory snacks. The numbers of medium and small manufactures are estimated to be in the thousands; mostly located on Java. The number of these manufactures has increased over sixty percent during the past five years. Also, many medium-scale snack food manufactures produce bulk plain snacks, which they sell to larger snack companies for further processing. The large manufactures add flavoring and packaging and then retail the products under their own specific brand names.

Sweet snack foods, which generally include items like sweet biscuits, creamed layered biscuits, butter cookies, chocolate and cheese wafers, and different types of extruded snacks, to include chocolate and vanilla rolls, *chiki* chocolate balls, chocolate filling squares, and chocolate coated square. The manufactures add imported skim milk powder, sweet whey, full cream, and demineralized whey to the ingredient mixture and/or as additional ingredients for chocolate coating and filling. Other imported

products, such as egg powder, malt extract, emulsifier, flavoring, vitamin premix (B1, B2, B6, B12) are used in smaller amounts. Primary ingredients include wheat flour (although milled from imported wheat), vegetable fats and oils, sugar, and cocoa powder (see Table 3).

Savory snacks consists of potato chips, corn chips, extruded cheese balls, short sticks (*Cheetos*), square/roll stick with cheese filling and/or cheese coating or other fillings. The primary imported ingredients are mostly corn starch, potato starch, sweet whey, cheese powder, and cream cheese. These imported items are used in smaller quantities when compared to the primary local ingredients, like corn powder and dried corn kernel for extruded snack food production.

Consumption

Flour

Although Indonesia imports wheat from several countries, the majority comes from Australia. In 2007, the total production of wheat flour was about 1.61 million tons with the value of 2.03 billion dollars (BPS). The majority of wheat flour goes to produce instant noodles, (54%), the baking sector (27%), biscuit and snack manufactures (14%), and to retail (5%). In 2007, approximately 225,400 tons of wheat flour was used by biscuit and snack food manufactures. An industry report, based on BPS data, stated that in 2008, 5 million tons of wheat flour were produced in Indonesia, and that 10 million tons were produced in 2009. Based on this report, Indonesia's estimated growth rate of wheat flour is 1.4 million tons annually.

Imported wheat flour in 2008 reached around 490 thousand tons, valued at approximately 250 million dollars. In 2009, the volume increase to 747,151 tons, although the value remained somewhat static at 252 million dollars (BPS Export-Import Online). Most imported wheat flour from Turkey, China, India, and Australia (Business Indonesia Online, 2009).

Corn starch imports in 2009 were 69,727 tons, valued at 24.8 million dollars. In 2010, corn starch imports are bullish, as import levels reached up to 53,979 tons in the first four months of 2010 (BPS).

Corn starch is used by almost all snack food manufactures, especially for extruded sweet and savory snacks.

In 2009, 14,069 tons potato starch was imported with the value 7.7 million dollars from Europe for extruded and savory snacks and potato chips. The first four months of 2010 show that potato starch consumption remains steady (5,098 tons). The industry uses potato starch between as mixture of other basic ingredients or as potato chips.

Dairy

Skim milk powder is the main dairy ingredient for most snacks and is imported from the United States, with 45 percent of market share, New Zealand, Australia, and European countries.

Sweet whey is imported for the production of sweet biscuits and snacks and chocolate coating. Approximately 40% of sweet whey is imported from United States, valued at approximately 8.9 million dollars, with the rest coming from Europe, New Zealand and Australia.

Butter is used by sweet snack manufactures to produce butter cookies, chocolate chip cookies, and other sweet biscuits at 14,400 tons annually. According to importers, the overwhelming majority of butter is used during the Moslem holy month of Ramadan and Idul Fitri, which is celebrated after Ramadan ends. Reports indicated that the use of butter by the food industry can be as high as 12,000 tons in just the three months surrounding Ramadan alone.

Demineralized whey is used for chocolate coating in both extruded snacks and sweet biscuits at between 500 and 884 tons per year.

Lactose is used by snack manufactures to increase shelf life of most baked and sweet snack products at 900 - 1,200 tons annually, valued at 1.1 million dollars. This product primarily comes from the United States, New Zealand and Australia.

In 2009, 126 tons of cheese powder was imported at a value of 843,374 dollars. During the first four months of 2010, imports reached 47 percent of the total 2009 import levels, at almost 59 tons. Of five Indonesian snack manufactures questioned, their annual average cheese powder needs ranged between 240 and 360 tons annually (see Table 3).

Cream cheese is currently imported from New Zealand and Australia at a total of 900 tons per year for extruded snacks as cheese filling and as layers in wafers.

Table2. Total Food Ingredient Import Volume and Value in Indonesia

Ingredient	Industry Type*	2009		2010**	
		Volume (MT)	Value (Million USD)	Volume (MT)	Value (Million USD)
Skim Milk Powder (SMP)	B, S, Bv	72,477	167.5	35,464	108.5
Whole Milk Powder/Full Cream (WMP)	B, S, Bv	19,635	52.2	311,046	37.7
Sweet Whey	B, S, Bv	27,358	31.2	17,837	24.7
Whey (demineralized/ others)	B, S, Bv	5,494	8.0	4,859	9.0
Buttermilk	B, S	6,866	13.1	4,217	11.4
Butter	B, S	3,224	8.9	2,152	9.7
Anhydrous Milk Fat (Butterfat)	B, S	5,606	16.5	3,182	13.9
Cream Cheese	B, S	3,657	15.9	1,914	8.2
Cheese Powder	S	126	0.8	59	0.5
Egg Powder	B, S	1,789	9.6	431	2.3
Corn Starch	B, S, R, O	69,727	24.8	53,979	21
Potato Starch	B, S, R, O	14,069	7.7	5,098	2.5

Source: Export – Import Online Data of Center of Bureau Statistic (BPS), Jakarta (Value & Volume recalculated for the purpose of this report only)

*Type of industry using the ingredient: **B**~Bakery, **S**~Snack & Confectionery, **Bv**~Beverage, **O**~Other Food Industry

**Data collected from BPS Export-Import Online of January – April 2010.

Other Ingredients

Egg powder is utilized mainly by sweet snack industry at an average of 895 tons per year. The United States maintains 44 percent of the market share, with a value of 2.2 million dollars. The remaining imported egg powder generally comes from India and the Ukraine (see Table 3).

Raisin consumption last year was approximately 820 tons. These were imported by several major sweet snack food manufactures (see Table 3).

Concentrated savory seasoning is imported from Japan at the rate of 60 to 80 tons per year. Popular flavors include seaweed flavor, steak flavor, American barbeque sauce flavor, cheese burger flavor, pizza flavor, and Swiss cheese.

The consumption of maltodextrin, mainly from China, was 240 tons, valued at 120,000 dollars in 2009. Dextrose imports (4,500 tons) also came primarily from China was used as a sugar substitute by several industries. Malt extract (4,800 tons) was also imported from China on regular basis (see Table 3).

Imported emulsifiers from the United States, India, Korea, and Europe are used by medium and large manufactures of sweet snacks, as well as small home-industry snack food manufactures. The U.S. annual market share is 20 percent of total imports (432 tons). The industry uses emulsifiers as water and fat binders.

Table3. Summary of Estimated Consumption required in Sweet and Savory Snack Industries*

Ingredients	Estimated Consumption (Tons/year)*	Country of Origin
Skim Milk Powder	12,000-18,000	USA, Europe, New Zealand, Australia
Sweet Whey Powder	30,000	USA, Australia, New Zealand, Europe
Anhydrous Milk Fat (AMF)	2,800	New Zealand, Australia, Europe
Full Cream	3,600	New Zealand, Australia, Europe
Demineralized Whey	500-884	Australia, Europe
Butter	2,400-12,000	New Zealand, Australia, Europe, Local
Cream cheese	900	New Zealand, Australia
Lactose	900-1,200	USA, New Zealand, Australia
Cheese powder	360	New Zealand, Australia, Malaysia
Egg powder	894	USA, Ukraine, India
Baking powder	1,000	Europe, Australia, Local
Corn starch	1,200 – 1,500	Austria
Potato starch	1,100 – 1,300	Europe

Raisins	820	USA, Middle East, China, South Africa
Malt Extract	4,800	China
Maltodextrin	240	China
Dextrose	4,500	China
Emulsifier	400-600	USA, India, Korea, Europe
Vanilla flavor	840	China
Flavoring: chocolate, strawberry, pineapple, blueberry, others	66 - 70	Local, Europe
Vegetable Fat	30,000	Local
Palm Oil	13,200	Local
Tapioca	3,000	Local
Corn powder	1,920 – 2,500	Local
Dried corn kernel – mash 8 & 16	18,000	Local
Cocoa powder	1,320	Local

**Estimation by FAS USDA survey based on 7 major importers and less than 5 snack-manufactures. The volume estimated from five to eleven large snack-manufactures utilizing imported ingredients in Jakarta, Bandung, Surabaya (June-August, 2010)*

Main Consumers

The demand for both savory and sweet snacks continues to increase because of more affordable prices, and smaller, more attractive packaging. It is a competitive industry and ranges from small to large scale manufactures. The volumes of ingredients required may increase three to five times more prior to and during the Ramadan period. Snacks are popular during the fasting month and are exchanged as gifts during Ramadan among all Indonesians.

Indonesia's 82 million children and teenagers are the targeted consumers for snack manufactures.

Medium and low-end manufactures produce snacks for almost exclusively for traditional markets, as these outlets have lower quality and packaging requirements. About five to ten percent of the products go to modern retailers.

Middle to high-end customers, about 20 percent of the population (46 million people), are more concerned about snack food content and quality. They normally purchase branded snacks, produced by major manufactures sold in modern retail outlets throughout the country. The snacks of medium to large scale manufactures are consumed by all levels of population in Indonesia.

Preference

Most importers prefer to work directly with U.S. suppliers in obtaining ingredients for snack manufactures, rather than work through agents or traders. However, in recent years it has been more difficult for Indonesian importers to find responsive U.S. suppliers.

In general, snack manufactures prefer sweet whey from Europe or Australia, because U.S. sweet whey has different specifications in terms of color (more yellowish), salt content, and they claim that U.S.

sweet whey is prone to caking. Presumably, sweet whey is obtained from different types of cheeses. Furthermore, the European product has 1.5 years shelf-life, compared to U.S. sweet whey, which has a shelf life of only one year.

Indonesian importers also claim that skim milk powder from New Zealand and Australia has a two year shelf-life versus U.S. skim milk powder, which has a shelf life of one year.

Since this market is very price sensitive, U.S. ingredients for the snack food industry should remain competitive, as in skim milk and sweet whey products (up to 10% less).

Corn based ingredients and soy based ingredients from the United States face import challenges due to Indonesia's biotechnology policies.

Higher-end consumers may be more concerned with quality than price for branded snack products. Cheese flavor, real butter, vanilla and blueberry flavor, vitamin fortified products, and premium brands are more favorable for this segment.

Middle and lower-end consumers often prefer chocolate and strawberry flavors, chili, and barbeque and cheese flavored savory snacks. The current competitive price range is between 0.05 dollars and 0.11, as higher prices will be less competitive. If the ingredient prices increase, adjustment to packaging is recommended.

Distribution

There are fifteen major Indonesian importers of food and beverage ingredients for the snack food industry. All imported ingredients enter the market in Jakarta in 20 or 40 foot containers. The ingredients are then broken down to fit onto smaller vessels or trucks and are then distributed to Surabaya and Medan.

Most major importers have their own storage facilities and container trucks which they use to distribute the products to the manufactures, sub-distributors or agents in major cities throughout Indonesia. Sub-distributors and agents can directly sell the ingredients to manufactures or to local SMEs and home-industries.

Large snack manufactures normally import their own ingredients in high volumes. All imported ingredients come into Jakarta and then are shipped directly to storage facilities or factories. The largest food and beverage manufactures are located on Java, as most the majority of the Indonesian population is concentrated there.

The medium and large scale snack food manufactures distribute their products directly to retailers' warehouses, hypermarkets, supermarkets, and minimarkets, and traditional markets. Small vendors purchase branded snacks from agents, sub-agents, or wholesalers.

The small snack food manufactures distribute directly to traditional markets directly and to some modern markets in Jakarta. Primarily, these products go to agents in Jakarta and various other cities

where the products are distributed to small street vendors, mom and pop stores (*warung*), and independent vendors.

Constraints

The main constraint in Indonesia remains the distribution infrastructure, with poor storage facilities, unreliable shipping agencies, and very poor transportation infrastructure. This results in extra costs, which are passed on through higher prices, particularly as products reach more remote areas away from larger cities and distribution points.

Most snack food enterprises are unaware of the availability of various U.S. ingredient products for snack foods. This is due to a lack of promotion by U.S. suppliers, as reported by importers and distributors.

When ordering ingredients, the empirical system of measurement confuses most Indonesian importers/distributors, as they are accustomed to international metric system.

Though the U.S. has consistently supplied to the Indonesian market, rapid fluctuations in U.S. dairy ingredients price between ordering and shipping time has created concern among some dairy product importers.

U.S. suppliers have a tendency not to follow the National Agency for Drug and Food Control (BPOM) requirements; especially for dairy based and other ingredients for this industry.

Advantages and Challenges for Snack Ingredients Products in Indonesia

Advantages	Challenges (<i>Barriers to U.S. Export</i>)
U.S. ingredients are known for best quality products and consistent supply.	Prices in general are higher compared to other countries and domestic products.
U.S. ingredients popularity set trend on any new style products in sweet and savory snack industry.	Lack of introduction and promotion support to create awareness of various ingredients to local distributors and end consumers.
Some ingredients cannot be produced locally such as raisins, all whey products, and egg powder.	Industry looks for alternative and less expensive ingredients.
Ingredients like vitamin pre-mix, WPC 50 and 60 for healthy/diet snacks.	U.S. suppliers tend to request for large quantity making it difficult for importer to order small quantity especially for specialty ingredients.
Import tariffs around 5 percent.	Indonesia makes use of creative non-Tariff Barriers. Currently this impacts retail products more than ingredient products.
The increasing number of modern upscale retail outlet requires a wide range of specialty snacks.	Competition from other countries like Australia, New Zealand, Europe, and China.

Importation gets easier, once a long-term relationship established between U.S. suppliers and local suppliers.	U.S. suppliers are not familiar with local culture, system, industry, specific ingredient requirements, and lack of good long term relationship with the local importers.
Dependable importers exist for any U.S. ingredient products for this industry.	Inconsistency of import regulations, procedures, and custom clearance continue to be a major constrain for U.S. ingredients to enter this market.

Dairy products must be certified as halal by an approved U.S. halal certifying body, which has been recognized by the Indonesian Council of Ulama (MUI). In some cases this can make it more challenging for the Indonesian bakery industry to source foreign products. In the United States, some halal certification bodies are currently approved by MUI to certify U.S. dairy products. (Decree Number D-410/MUI/X/2009, List of Approved Foreign Halal Certification Body).

Importing new products can be burdensome and time consuming, especially so for functional ingredients. This is primarily due to BPOM and other regulatory agencies, as they lack knowledge of new ingredients. This leads to unpredictable and unclear regulations and implementation, coupled with onerous testing procedures.

Because of irregularity in government regulations and procedures, medium and large scale manufacturers must adjust their imported ingredients accordingly by country, as to keep production going. Occasionally, they are forced to use less expensive and lower quality ingredients from domestic or regional sources. The SME and home-scale snack manufactures will likely increase production levels over the next few years due to lower production costs and the availability of ingredients from local and/or other Asian countries. The common practice of this type of manufacture is labor intensive, low quality, and high cost.

Competition

Australia and New Zealand remain the primary main competitors in Indonesia. The closer proximity to Indonesia gives them an advantage in freight costs and shipping times. Also, comparative exchange rates with the U.S. dollar and currencies in Australia and New Zealand remain a major determinant in U.S. snack ingredient competitiveness in the Indonesian market.

The current market share for Australia and New Zealand is between 40 percent and 60 percent in most snack ingredients in general.

Europe, with its long history with Indonesia, has also become a major supplier of snack ingredients, although in general European product prices are 10-15 percent higher than U.S. prices.

China is also poised to become a major player in the Indonesian market. They have products available at up to 50 percent less expensive than any other country. However, targeted the industry sector is the SME level, as they are less concerned with quality and are strictly price sensitive.

Ingredients such as vegetable fats, palm oil, tapioca, and cocoa powder are produced locally, as the sources are in abundance and inexpensive. Corn powder and dried corn kernels also come from local and imported corn.

Government Policy

In addition to a 5 percent import duty, the Indonesian government imposes a 10 percent Value Added Tax (VAT) on all imported products including all basic ingredients for the snack food industry.

BPOM and the Directorate General of Livestock (DGLS) require the following documentation for importing snack ingredients and animal based ingredients utilized by snack industry:

- Health Certificate must accompany each product at the point of entry, valid for two months and for one shipment only. It must be issued by U.S. Department of Agriculture and endorsed by any appointed services.
- Halal Certificate from country of origin is required and based on the Decree of The Indonesian Council of Ulama D-140/MUI/X/2009, October 15, 2009. The approved Halal Certification Agencies in the USA for certifying processed ingredients but not flavoring are:
 1. American Halal Foundation (AHF)
 2. Halal Food Council S.E.A
 3. Islamic Food and Nutrition Council of America (IFANCA)

Forecast and Future Development

Steady growth

According to importers, the growth of imported snack food ingredients is projected to grow at 20 - 25 percent annually over the next five years. Factors attributed to the growth in snack ingredient imports include the establishment of new manufactures; business expansion for existing manufactures, which means an increase to quantity in demand; more variations of ingredients for expanded product development; and improved distributions systems and storage facilities. Several importers plan to expand their business serving baking sector, food service, and retail.

The snack manufactures survey for this report stated that they expect a 20 percent average annual increase in production over the next five years. The expected growth is the result of new products lines, increased production capacity, and improved distribution infrastructure outside Jakarta (i.e. Java, Sumatera, Kalimantan, and Sulawesi). The manufactures are also appointing more agents and sub-agents on these growth areas. From April 2009 to April 2010 the number of hypermarkets was up to eight percent (160 to 173 outlets) and the number of minimarkets also increased 26 percent during the same period (Nielsen Indonesia).

Other Opportunities

Growth for biscuits is predicted to increase by 7.5 percent in volume, with snack foods increasing generally by 9.2 percent in volume between 2009 and 2010 (Nielsen Indonesia). This growth suggests that potential for imported snack food ingredients will continue to grow.

The trends also suggest more room for growth for healthier products, particularly for consumers with more disposable income. Products that fit this description include low sugar, low salt, high fiber, whole wheat, and organic ingredients.

If the U.S. ingredient prices are competitive enough then the largest segment of the snack manufactures will be able to purchase them in higher volumes. For instance, sweet whey at 1,920 tons/year and over 50 tons/year of cheese powder will be in used by five major snack producers. A single home-scale snack manufacture can produce up to 1,800 tons/month of cheese sticks, puff pastries, cookies, and dried breads.

Products which may have opportunity in this market are:

- Several importers expressed interest in non-commodity ingredients in small volume, but functional ingredients such as high protein concentrate for chocolate coating, enzyme, and vitamins premix (B1, B2, B6, B12) for fortification to produce healthier snacks requested by middle and upper class community.
- Currently, imported Whey Protein Concentrate (WPC) 50 & 60 from Netherland has been in used at the rate of 2 tons/year by at least three manufactures specialized in producing healthy snacks for upper income consumers.
- Soy lecithin has been used by almost all snack manufactures over 7,000 tons/year as reported by several importers.
- Imported demineralized whey from Europe is used for chocolate coating on healthy snack manufactures in volume of at least 1,200 tons/year.
- Non-GMO corn starch from Europe is currently used by all food and snack manufacturing. In 2009 alone the total import was 69,727 tons of 24.8 million dollars and already reached up to 53,979 tons of 21 million dollars (77%) in the first four months of 2010.
- Potato starch from Europe has been used by the extruded and potato chips manufactures at about 1,300 tons annually (711,493 dollars).
- The United States has the opportunity for more share than current 20 percent of 2,160 tons (i.e. 432 tons) annually for emulsifiers. Imported emulsifier as water and fat binding (0.5% of total ingredients) are used by medium to large manufactures (25% ~ 540 tons) of sweet snack, small home industry snack manufactures (20% ~ 432 tons), confectionary (20% ~ 432 tons), chocolate candy manufactures (25% ~ 540 tons), and beverages (<10% ~ 216 tons).
- Approximately 408 tons per year of imported raisins are currently in demand for sweet snack/biscuit manufactures.
- According to a few manufactures, imported sugar is of better quality, has more consistent supply, and is 25 percent less expensive than local sugar. Some manufacturers occasionally use imported sugar from Thailand and Vietnam. The consumption of sugar for a single snack and beverage industry can reached 3,600 tons or more per year.
- Dextrose from China is used as alternative to sugar at the rate of 1,000 tons/year.

Recommendations

- U.S. cooperators, state and regional trade groups and suppliers should coordinate with FAS Jakarta to organize U.S. ingredient shows for the Indonesian food and beverage industry annually. The focus should be on big cities around Indonesia, to include Jakarta, Medan, Surabaya, Yogyakarta and Solo. Local importers and distributors should be invited. Arrange one-on-one consultations, as necessary, between the interested manufacturers and U.S. suppliers to address any technical difficulties encountered by the industry in ingredients applications.
- Buying mission in conjunction with U.S. food ingredient show for the ingredient importers and snack manufactures should be organized on regular basis. These should include visiting related

U.S. ingredient manufactures/suppliers, at the same time opening up opportunity to source for new items for the industries

- Indonesian food and beverage ingredient importers should form an association to work collectively to overcome any import barriers, inconsistent government requirements, regulate price and control any unfair trades among the members.

POST CONTACT AND FURTHER INFORMATION

The U.S. Foreign Agricultural Service 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. FAS in Jakarta at the following address:

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Please contact our home page for more information on exporting U.S. food products to Indonesia, including *Exporter Guide: Indonesia*; *Food Processing Sector Report: Indonesia*; *The Retail Sector Report: Indonesia*; *The HRI Food Service Sector Report: Indonesia*; *Market Brief – Bakery Products Ingredients*; and other related reports.

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