



Margarine

WHAT'S INSIDE

Indonesian-made margarine has a large market share in the world because it is made of crude palm oil (CPO), which comes from palm oil. CPO is one of natural oils which has become Indonesia's major agriculture commodity.

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Dear Valued Readers,

Crude palm oil (CPO) comes from palm oil and has various derivative products with higher added value as export commodities such as cooking oil, margarine and cocoa butter substitute (SBS). The derivative products are dominated by food industry through various process such as fractioning, refinement and purification. CPO can also processed to become pharmaceuticals, cosmetics, plastics, lubricants and alternative fuel in the form of biodiesel.

The December edition of Export News discusses margarine, one of CPO derivative products with high added value, from export development and other important information which are needed by buyers who want to procure Indonesian margarine. As usual, we also include a list of margarine exporters so that interested buyers can have direct communication.

Currently, margarine consumption is not only limited to industry but also at households. Generally, margarine is used to enhance the flavor of food.

Thank You

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hot issue

M A R C H

The needs on energy source is a basic necessity and becomes a major focus in every country. On the other hand, a country's strategic role is held by the plantation sector, such as Indonesia which has palm oil. There are plenty of usages for palm oil from fruit, trunk, leaves and roots which can be processed into products with higher added values. Palm oil produces crude palm oil (CPO), a reliable vegetable oil because it has numerous advantages when compared to oils produced by other plants. One of the advantages is low cholesterol level at 3 milligrams per kilogram. On the other hand, animal oils have higher cholesterol content at 50 to 100 times higher than CPO. Food industry uses many CPO derivatives, such cooking oil and margarine.

Currently, margarine consumption is not only limited to industry but also at households. Generally, margarine is used to enhance the flavor of food. Margarine is used as a main ingredient in making cookies as prescribed by leading chefs in their cooking books. Margarine can also be used as bread spread and as a substitute for cooking oil in preparing food and cookies for the family. As margarine has such high versatility, there are plenty of brands and prices of margarine being sold in the world's market. The demand for margarine, which is grouped under Harmonized System (HS) code 1517, kept increasing in the period of 2009-2013 with a trend of 9.27% based on data from the International Trade Centre (ITC).

M A R G A R I N E





The general public knows margarine and butter as a similar product but based on their raw materials, they are very different. Margarine is made of vegetable oil while butter is from milk. The function of margarine and butter is not only for spread but as softener and shortener in almost all bread and cake. While the main softener for bread is yeast and baking soda, both margarine and butter have important role to prevent bread and cake from getting burned and sticky while being baked on the oven. The aroma of margarine and butter will also increase the taste of bread. Margarine and butter have an even more important role to make cookies crunchy.

Currently, most of margarine is made of CPO because it is the cheapest vegetable oil. CPO is more competitive when compared to other vegetable oils because of: a. Relatively higher per-hectare productivity, b. Perennial plant which is rather reliable against agroclimate changes, and c. Has been proven not to spark increasing cholesterol level and contains beta-caroten as pro-vitamin A. Other than palm and palm oil, margarine can also be made from other vegetable oils such as peanut, daisy, soybean, corn, rapeseed and many others. Each oil has its own advantages due to specific taste. Margarine is a fatty ingredient similar to butter in both physical appearance, properties

and compositions. Margarine is made to substitute butter.

Currently there are numerous types and qualities of margarine in the market. Margarine is used to make various products such as bread, cake, cookies, pastry and many others. Each product requires certain type of margarine to get the best result. For example, pastry margarine cannot be used to make bread or cake. Multipurpose margarine can be used for various products but cannot be used to make layers on pastry products. Such products have their own classes from economy to premium. Therefore, margarine being used as an ingredient in a product has to conform with the class of the intended product. Economy sweet bread will not use premium margarine as an ingredient due to the bread's cheaper selling price. On the other hand, premium sweet bread will not use cheaper margarine because the result will not reflect it being a premium product. For bread makers, margarine is one of main ingredients other than wheat flour. The use of exact margarine will optimize products which in turn will increase profits.

The world's import of margarine in the five-year period of 2009-2013 enjoyed an increasing trend of 9.27% from US\$4.09 billion in 2009 to US\$5.55 billion in 2013.

The world's import of margarine (HS 1517) in 2009-2013

US\$000

Year	Total import value
2009	4,096,676
2010	4,311,794
2011	5,833,393
2012	5,698,318
2013	5,552,101

Source: International Trade Centre (ITC)

The world's import is dominated by European countries such as France and Germany and followed by China, Chile and the United States. In 2013, those countries imported margarine worth US\$445.38 million for market share of 8.02%), US\$346.95 million (6.25%), US\$273.74 million (4.93%), US\$235.87 million (4.25%) and US\$219.46 million (3.95%) respectively.

World trade of those products can be seen in the following table:

Belgium and the Netherlands dominated the export of margarine and were followed by Indonesia, the United States and Germany. In 2013, Belgium exported US\$851.85 million worth of margarine for a market share of 13.68% and followed by the Netherlands with US\$697.12 million (11.19%), Indonesia with US\$600.05 million (9.63%), the United States with US\$452.58 million (7.27%) and Germany with US\$384.37 million (6.17%). Meanwhile, countries grouped in ASEAN had a joint market share of 16.92% with Indonesia topped the

Margarine derivative products (HS 1517)

HS	Products
151790	Edible mx/prep of animal/veg fats&oils/of fractions ex hd No 15.16
151710	Margarine, excluding liquid margarine

The difference between products grouped under HS 151710 and HS 151790 lies in the use of raw materials. HS 151710 uses one type of fat source, such as milk for butter, CPO or other vegetable oils for margarine. On the other hand, HS 151790 is an emulsion of vegetable oil or animal fat with water, or the mixture of vegetable and animal fat.

The product enjoyed a positive export growth in the 2009-2013 period at 7.95% from US\$4.80 billion in 2009 to US\$6.22 billion in 2013.

tally. Malaysia was the second largest exporter of margarine among ASEAN countries with an export value of US\$307.46 million worth or a market share of 4.94% and followed by Singapore with US\$92.16 million (1.48%), Thailand with US\$52.78 million (0.85%), the Philippines with US\$693,000 (0.01%) and Brunei Darussalam with US\$507,000 (0.01%). Cambodia, Laos, Myanmar and Vietnam have even much smaller market share in the world.

Indeed, Indonesia has very high potential of exporting CPO and its derivative products because the country has very good natural resources and raw materials for the products. Indonesian CPO and margarine, which is made from CPO, have been well accepted by the international market as shown by data from the Central Statistics Agency (BPS). The export in the first nine months of 2014 reached US\$575.68 million or representing 95.94% from the full year export in 2013. When compared to the same period in 2013, there was an increase of 32.56% from US\$434.29 million.

The world's export of margarine (HS 1517) in 2009-2013

US\$000

Year	Total export value
2009	4,806,161
2010	4,902,194
2011	6,778,335
2012	6,272,230
2013	6,229,050

Source: International Trade Centre (ITC)

In the same period, China was the top destination country with 33.02% from the total margarine export, followed by Nigeria (6.83%), Turkey (4.54%), Russia (4.44%) and Algeria (3.93%). The export values were US\$190.07 million, US\$39.33 million, US\$39.33 million, US\$26.12 million, US\$25.55 million and US\$26.62 million respectively.

Based on product category, those grouped under HS 151790 (Edible mixtures or preparations of animal or vegetable fats or oils or fractions of different fats and oils covered by headings 1501 through 1515) were the largest export group with US\$515.62 million, a 33.71% increase from the export in the previous year at US\$385.62 million. Meanwhile, the export of products under HS 151710 (Margarine, excluding liquid margarine) reached US\$60.05 million, increasing by 23.40% from the previous year at US\$48.66 million.

The export of Indonesian margarine grew by 28.02% in the 2009-2013 period from US\$264.28 in 2009 to US\$600.05 in 2013. Indonesian margarine industry can be found in several provinces including West Java, Banten, Jakarta and North Sumatra.

Indonesia is not only exporting margarine but also importing margarine albeit in a small number. In the first nine months of 2014, the import reached 4.55% of the total export. The import was from

Malaysia, Singapore, Australia, the United States and Denmark.

Nowadays more and more Indonesian companies are developing CPO derivative products with high added value so they can compete in the international market. One of them is PT Bina Karya Prim (BKP) which started its business in 1981. The company has the experiences in producing soap and cooking oil. BKP is a well known company in Indonesia and its brands have become household names. The company is committed and fully responsible to make quality products. One of the products is healthy margarin ForVITA, which is free from the dangerous trans fatty. Trans fatty can increase the low density lipoprotein (LDL), widely known as the bad cholesterol, which high level can cause, among other diseases, heart attack. ForVITA also contains vitamin A which is good for eyes. With such advantages, ForVITA margarine is the correct choice in making healthy food. Other than BKP, there are many other companies in Indonesai making healthy margarine.



LIST OF EXPORTERS

BINA KARYA PRIMA, PT

Jl. Raya Bekasi Km. 27 Pejuang,
Medan Satria – 17131, West Java,
Indonesia
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Fax : (62-21) 57954588
Email : exp@bkpjkt.com,
luter@bkpjkt.com
Website : www.bkpjkt.com
Products : Margarine, Excluding Liquid
Margarine, Palm Oils

INDOFOOD SUKSES MAKMUR Tbk, PT

Sudirman Plaza Indofood Tower 23rd floor,
Jl. Jend. Sudirman Kav. 76 – 78,
Jakarta 12910 Indonesia
Phone : (62-21) 57958822
Fax : (62-21) 57935960, 57937422
Email : international@indofood.co.id,
ism@indofood.co.id,
herman.asalee@indofood.co.id,
ellybetty@icbp.indofood.co.id
Website : www.indofood.co.id,
www.indofood.com
Products : Margarine; Excl. Liquid
Margarine in Other Container,
Other Cereals, Palm Oils, Soups
And Broths And Preparations
Therefor; Homogenised
Composite Food Preparation,
Soya Sauce, Tomato Sauce

SMART Tbk, PT

Plaza BII Tower II Floor 28-31,
Jl. M.H. Thamrin No. 51 Kav. 22, Jakarta
10350 Indonesia
Phone : (62-21) 3181288, 50333888
Fax : (62-21) 3181289, 3925786
Email : heri-harjanto@smart-tbk.com,
harry-hanawi@smart-tbk.com,
suriyanti-karyoko@smart-tbk.com,
yenni@smart-tbk.com
Website : www.smart-tbk.com
Products : Cocoa Butter, Fat And Oil., Cocoa
Paste Wholly/Partly Defatted,
Cocoa Paste, Whether or Not
Defatted, Cooking Oil, Crude
Palm Oils, Food and Beverages,
Margarine, Excluding Liquid
Margarine, Shortening, Vegetable
Fats & Oils

MEGASURYA MAS, PT

Jl. Tambak Sawah No. 32, Waru
East Java 61256, Indonesia
Phone : (62-31) 8662390, 8662391,
8868333
Fax : (62-31) 8665521
Email : general@megasurya-mas.com,
exim@megasurya-mas.com,
listya_exim@megasurya-mas.com
Website : www.megasurya-mas.com
Products : Bath And Toilet Soap, Liquid
Washing Preparations, Including
Bleaching For Retail Sale,
Margarine, Excluding Liquid
Margarine, Other Copra Oils,
Other organic Surface-Active
Products For Toilet Used, Palm
Oils, Shortening

MIKIE OLEO NABATI INDUSTRI, PT

Jl. Raya Narogong Km. 09, Bojong Menteng,
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Phone : (62-21) 82606060
Fax : (62-21) 8250304
Email : general@mikie-oleo.com,
siushia@miki-oleo.com
Website : www.mikie-oleo.com
Products : Bath And Toilet Soap, Margarine,
Excluding Liquid Margarine, Palm
Oils

SINAR MEADOW INTERNATIONAL INDONESIA, PT

Jl. Pulo Ayang I / No. 6, Jakarta Industrial
Estate Pulogadung, Jakarta 13260,
Indonesia
Phone : (62-21) 4602981-85
Fax : (62-21) 4610223
Email : recruitment@smii.co.id,
smii@centrin.net.id
Website : http://www.sinarmeadow.com
Products : Butter, Margarine, Excluding
Liquid Margarine, Shortening

ASIANAGRO AGUNGJAYA, PT

Jl. MH. Thamrin No. 31, Kebon Melati,
Tanah Abang, Jakarta 10230, Indonesia
Phone : (62-21) 3923189
Fax : (62-21) 3923559
Email : marketing@aaj-id.com
Website : www.aaj-id.com
Products : Cocoa Beans, Whole Or Broken,
Raw Or Roasted, Crude Palm
Oils, Lard Stearin, Lard Oils,
Margarine, Excluding Liquid
Margarine, Palm Oils, Vegetable
Fats & Oils



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45044872
Fax. : (+33-1) - 45045032
Email : atdag-fra@kemendag.go.id
Website : -

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Fax. : (+49-30) - 44737142, 47807290
Email : atdag-deu@kemendag.go.id
Website : www.indonesian-embassy.de

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Website : -

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Website : www.itpcsantiago.cl

SAO PAULO

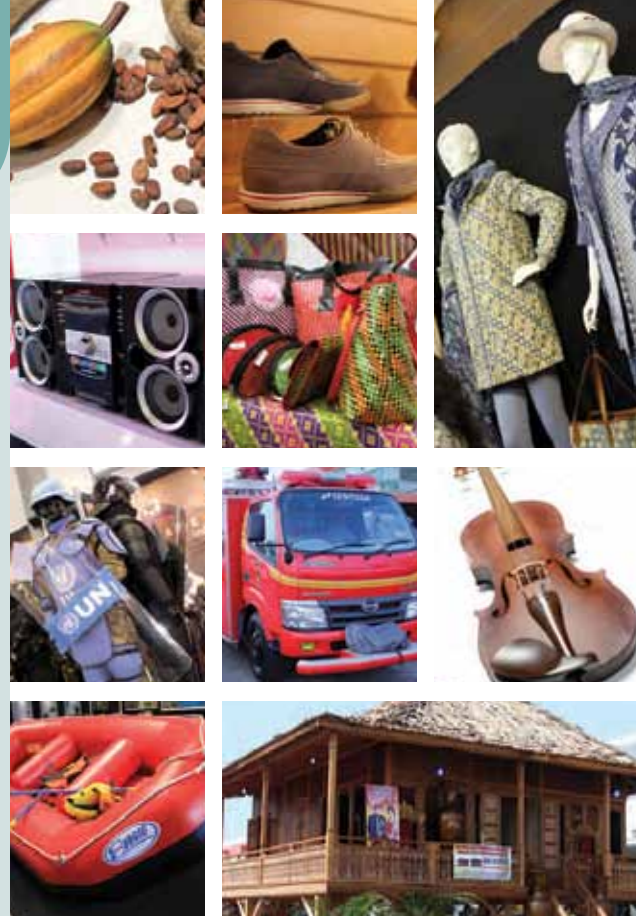
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Cerqueira Cesar - CEP.01419-002
Telp. : (+55-11) -32630472, 35411413
Fax. : (+55-11) - 32538126
Email : itpcsp@itpcsp.org;
itpc-bra@kemendag.go.id
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