

# NON-PAPER STATIONERY ANOTHER INDONESIA'S POTENTIAL PRODUCT

## WHAT'S INSIDE

Indonesia has a lot of superior products. One of those products is stationery commodity as presented in this edition. There is a growing number of local stationery manufacturers, which reflects the increasing number of national production capacity. Thus, DGNEP proudly introduce Indonesia's local product of stationery to meet the demand of local and global markets.

**Advisor :**

Nus Nuzulia Ishak

**Editor in Chief :**

Tuti Prahastuti

**Managing Editor :**

RA. Marlana

**Editor :**

Sugiarti

**Writer :**

Roesfitawati

**Design :**

Dewi

**Editorial Addresses :**

**DIRECTORATE GENERAL OF  
NATIONAL EXPORT DEVELOPMENT**

Ministry of Trade of The Republic of Indonesia

Jl. Ml. Ridwan Rais No. 5

Jakarta 10110 – Indonesia

Phone : +62 21 3858171

Fax : +62 21 23528652

Email : [csc@kemendag.go.id](mailto:csc@kemendag.go.id)

Website : <http://djpen.kemendag.go.id>

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Dear awesome readers,

We wish all of you are in good conditions and your businesses are also running well, even though the global economic situation is still struggling to move forward. In a positive point of view, we expect the recent condition not to be troublesome for your life and business alike. In contrast, we believe such hard situation will transform you to be stronger entrepreneurs to achieve greater success.

In an uncertainty, outstanding entrepreneurs must able to seek alternative business opportunities to replace their recent businesses that are experiencing stagnant conditions. For example, the non-paper stationery industry, which formerly might be not a prioritized business sector, provides huge export potentials. In fact, a number of local companies have successfully penetrated foreign markets for this commodity. Thus, in this edition, we present a review about the export potentials of stationery products, particularly the non-paper items.

Among the information provided in this bulletin, we provide the data about Indonesia's export performance of non-paper stationery products. By giving accurate information to foreign buyers, we would like to ensure that there are plenty of business opportunities for both buyers and suppliers in the non-paper stationery sector.

In Indonesia, the stationery business sector is classified into Various Industry, along with other industries such as footwear; tannery; musical instrument; toys; leather products; sport equipment; jewelry; eye glasses or optic; and watches. These sectors are categorized as manufactured products with added values which are expected to be able to compete in the global market. Thus, the government of Indonesia pays higher attention to the development of these fields, including stationery.

Thank you.

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# The Development of Stationery Industry in Indonesia

Amid the declining prices of oil and mineral goods, especially coal, it is important to start focusing on manufacturing industries that produce ready-to-use products for consumers. One of the business sectors which provide huge opportunities is the stationery industry. Therefore, the Government of Indonesia issued an official regulation to ensure the development of this sector to go well as planned.

The new regulation, Government Regulation No. 14/2015, states that national Various Industry is one of the leading sectors that is continuously developed, considering its contribution in terms of foreign exchange earnings and employment. The sectors that are included in Various Industry are stationery; footwear; tannery; musical instrument; toys; leather products; sport equipment; jewelry; eye glasses or optic; and watches. These sectors are categorized as manufactured products with added values to be able to compete in global market.

The Government of Indonesia obviously pays higher attention to the development

of these fields. Along with the support given by the government, the local stationery producers also formed an association called Gabungan Perusahaan Alat Tulis Indonesia (GIAT) or the Association of Indonesian Stationery Companies. The association is expected to be able to increase the national production capacity to fulfill demands from both domestic and international markets.

## Elevating Product Competitiveness

The increasing demand towards stationery products, locally and globally, has convinced the local entrepreneurs to steadily develop their businesses.

The demand comes from workers, students, and also general public such as housewives who need stationery to teach their children or to do hobbies. In order to meet the demand, it is essential for government to encourage the manufacturers to produce stationery items with unique designs, as an effort to attract consumers' interest.

A unique and innovative design is an effort to elevate product competitiveness, which make it possible for Indonesian commodity to grab export potentials in foreign markets. There are a lot of stationery producers from many countries. Thus, it is a must for local

exporters to offer stationery products that are different from existing ones, while keep maintaining the high quality.

In addition to unique and innovative designs, some Indonesian stationery producers also offers a number of products made from recycled items. This way, the producers provide both good designs and eco-friendly products. This kind of stationery also comes with cheaper prices, so there are more consumers who can buy such products. For example, a producer altered used books into pencil containers.



# Non-Paper Stationery

**The industrial sector of non-paper stationery products keeps growing due to the improvement of digital technology, which uses less paper to spread news and knowledge. Nowadays, a number of people prefer to read or get the information by using digital gadgets such as laptop or mobile phone. The development of digital media is also in accordance with the increased awareness of the customers to preserve the environment, particularly trees in the forests as the raw material to produce papers. Thus, more manufacturers in the stationery sector shift their focus to producing non-paper items.**

Generally, non-paper stationery products consist of: (1) storage and archiving products that are used to store documents such as manila file, soft-walled plastic filing, suspension filing, ring binders, indexes, dividers, and others; (2) stationery and drawing tools that are used for writing, drawing, marking or coloring, including pencils, ballpoint pens, roller balls, pen (including the refill materials refill), pen ink, fiber-tipped pens, plastic-tipped pens, crayons, highlighters, markers, eraser, sharpener and also brush; (3) presentation and planning materials such as planning boards, wall boards, white boards, flip charts and its accessories, calendar, yearly

agenda and so on; and (4) equipment desks and office items like masking tape, adhesive tape, glue, notes that can be attached (sticky notes), pen drawer, scissors, pins, clips, fasteners, staplers, cutters, hole punch, paper cutter, trimmer and mail rack. In addition, the art tools such as charcoal, graphite pen, oil paints and watercolors, picture frames and paint brushes included in this product group.

The Government of Indonesia also has determined the non-paper stationery sector as one of the potential industries, since this business also generates foreign exchange and absorbs huge number of employment. In the middle of a slowing economic growth which brought about by the global crisis, the enhancement of labor-intensive industries is one of effective strategies in maintaining and even bringing forward the people's welfare. Therefore, the Government of Indonesia underpins the effort to increase the competitiveness of local commodities including the non-paper stationery industry.

The development of this industry is also taking advantage of the country's increasing literacy rate, education level and prosperity of the citizens. In practice, the growing number of schools and offices has resulted to higher demands for stationery products, specifically non-



paper products. The users of non-paper stationery products can be categorized into three groups, they are (1) professional customers; (2) workers in small offices or home offices; and (3) personal users.

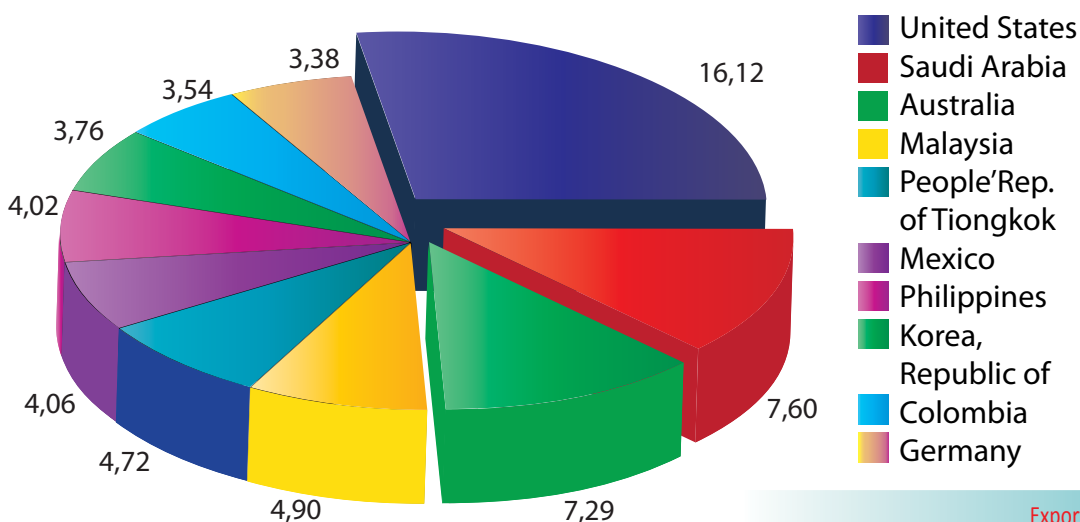
Related to the efforts of adding value to local products, Indonesian manufacturers are encouraged to pay attention to the small office and home office segments. Workers in these segments need specialty products to support their activities at their workplaces. The workers need not only the function of the products, but also require stationery items with good design which are unique and sophisticated.

The development of Indonesia's non-paper stationery industry takes place both in domestic and international markets. In Indonesia, the number of stationery manufacturers keeps increasing. The types

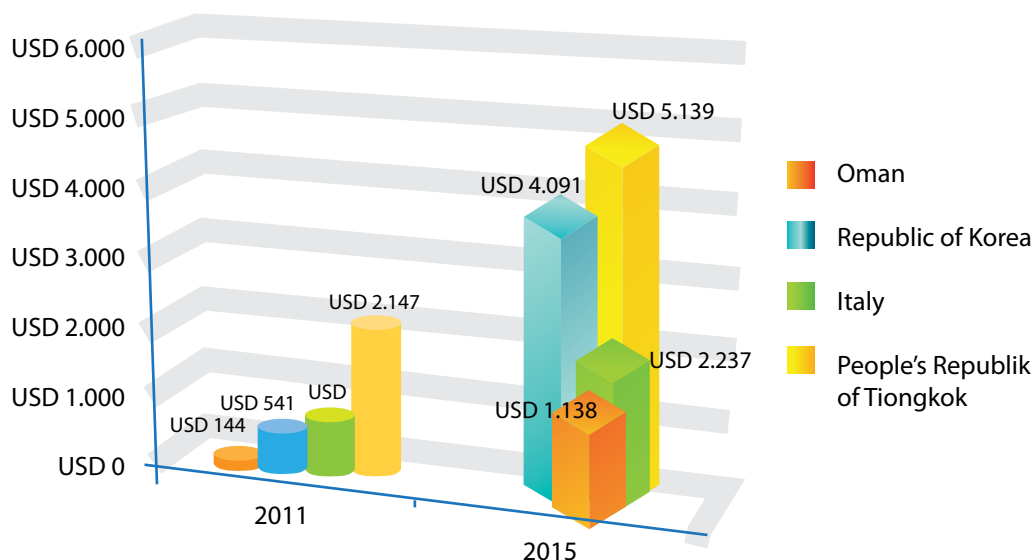
of non-paper stationery products are also becoming more varied due to the highly diversified market needs.

Meanwhile, the export performance of Indonesian non-paper stationery products also exhibited a good result. Until the end of 2015, the export value of this commodity was calculated at US\$108,90 million. The biggest market for Indonesian non-paper stationery products was the United States with a total of US\$17,55 million. Other largest markets for local non-paper stationery products are Saudi Arabia (US\$8,28 million), Australia (US\$7,94 million), Malaysia (US\$5,3 million), China (US\$5,14 million), Mexico (US\$4,42 million), Philippines (US\$4,38 million), South Korea (US\$4,09 million), Colombia (US\$3,85 million) and Germany (US\$3,68 million).

### MARKET EXPORT SHARE (%)



## Most Significant Growth of Export Values Stationery Non Paper from Indonesia to the World 2011-2015



Meanwhile, during the period of 2011-2015, there were four countries which experienced the largest growth as the export markets for Indonesian non-paper stationery products. Those countries are Oman which grew by 64,26% during the period and followed by South Korea at 53,37%, Italy at 29,02% and China at 25,23%.

Indonesian manufacturers of non-paper stationery products create various items to be used by customers in domestic and international markets. For foreign market in particular, the local products that achieved the highest demand are:

### Indonesia's Most Wanted Non-Paper Stationery Products in the World (2015)

No.	HS Code	Commodities	Volume (Tons)	Value (US\$ 000)
1.	960910	Crayons & other pencils with leads encased in a rigid sheath	8,610	74,231
2.	960810	Black pencils	1,004	13,553
3.	960990	Ball point pens of plastics	3,575	9,597
4.	960820	Pastels, drawing charcoals, tailors' chalks	797	6,685
5.	960920	Felt tipped & other porous-tipped pens & markers	391	2,242
6.	960891	Pencil leads, black/colored	19	1,055
7.	960899	Oth. ball point pens of plastics	128	715
8.	960860	Pen nibs and nib points of other material	9	397
9.	961210	Pen holders, pencil-holders & similar holder parts of the foregoing articles	99	177
10.	961100	Refills for ball point pens of plastics comprising the ball point & ink reservoir	7	105

Source: Central Statistics Agency



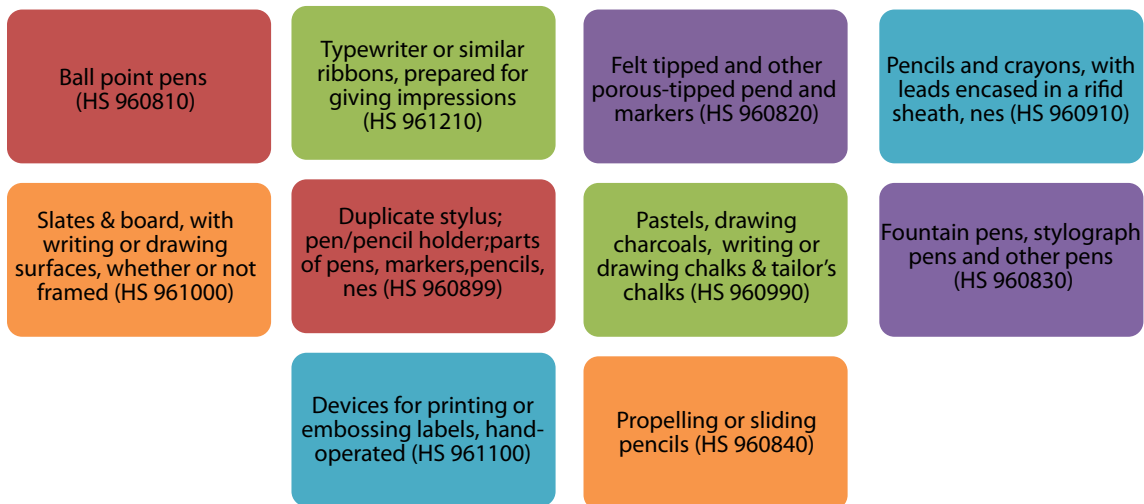
In the future, the stationery industry in Indonesia, including paper and books, is predicted to grow further. One of the factors fueling this industry is the growth of young and productive populations, which has led to the increasing number of offices and schools. More importantly, the rising number of people working in the creative industry, such as product designers and architects, who consume a large number of non-paper stationery tools to make sketches or images contribute significantly to the development of this industry.

In order to enhance Indonesia's export performance of non-paper stationery products, the Government of Indonesia, through the Ministry of Trade, encourages local exporters to produce and send products with the highest demands in the world. Based on the data from the International Trade Centre (ITC) in 2014, the much much-sought products were:

the annual report, other potential markets for this commodity are the countries located in Eastern Europe such as Hungary. PT Solo Murni is the first Indonesian company that successfully penetrated the Hungarian market. The company's success is expected to motivate and spur other companies to enter the Eastern European markets.

PT Solo Murni, selling products under the "Kiky" brand, has undergone excellent negotiation and cooperation with Cardex Európa Kft, one of primary companies in Hungary for stationery sector. The Indonesian company also has cooperation with other world's players, and has approximately 2,000 retailers. Thus, by building trade relationship with this company, the products imported from Indonesia can be distributed to all areas in Hungary. Furthermore, since Cardex Európa Kft also carries out export

### World's Highest Demand of Stationery Non Paper Products (2014)



Source: ITC calculations based on UN COMTRADE statistics

Furthermore, the Indonesian Ministry of Trade also intensifies the existence of its representatives abroad consisting of Trade Attachés and the Indonesia Trade Promotion Centers (ITPCs). According to

activities to its neighboring countries such as the Czech Republic, Finland, Croatia, Poland, and Italy, then it is very likely that Indonesian products can be re-exported to other European countries as well.

# LIST OF EXPORTERS

## ANEKA ANDALAN ASIA

Gunungan RT 01 RW/04, Ngesrep, Ngemplak, Boyolali, Central Java 57375, Indonesia

Phone : +62-271-784629, 783097, 783801  
Fax : +62-271-784629  
Email : [aneka8888@gmail.com](mailto:aneka8888@gmail.com)  
Phone : 62-271-783097  
Product : *Stationery*

## BAMBI NV

Jl. Balikpapan No. 17, Central Jakarta 10160, Indonesia

Phone : +62-21-3841868  
Fax : +62-21-3841869  
Email : [bambinv@rad.net.id](mailto:bambinv@rad.net.id), [bambinv@rad.net.id](mailto:bambinv@rad.net.id),  
[bastmega@rad.net.id](mailto:bastmega@rad.net.id), [nanniehr@yahoo.com](mailto:nanniehr@yahoo.com)  
Phone : +62-21-3841868  
Product : *Stationery*

## BATARA INDAH

Kawasan Industri Sentul, Jl. Olympic Raya Blok A8, Bogor, West Java 16810, Indonesia

Phone : +62-21-8757468 (Hunting)  
Fax : +62-21-8757248  
Email : [info@bantex.co.id](mailto:info@bantex.co.id), [info@bino.co.id](mailto:info@bino.co.id)  
Website : <http://www.bantex.co.id>  
Phone : 62-21 8757468  
Product : *Stationeries*

## BINTANG CAKRA KENCANA

Jl. Jend. A. Yani No. 378, Surakarta, Central Java 57143, Indonesia

Phone : +62-271-714505, 711044, 717009, 720810  
Fax : +62-271-717009, 720810  
Email : [kikyexport@kiky.com](mailto:kikyexport@kiky.com), [kikycorp@indo.net.id](mailto:kikycorp@indo.net.id),  
[marketing@bintang-cakra.co.id](mailto:marketing@bintang-cakra.co.id)  
Phone : +62-271-714505  
Product : *Writing Paper, Stationeries*

## BUKIT TINGGI SENTOSA

Jl. Kramat Pulo Dalam I No. 31, Kramat, Senen, Central Jakarta 10450, Indonesia

Phone : +62-21-3921179, 31927230  
Fax : +62-21-31927230  
Email : [bukitts@indosat.net.id](mailto:bukitts@indosat.net.id)  
Phone : +62-21 3921179  
Product : *Paper & Paperboard, Stationery*

## PELINDA SARANA SUKSES

Gedung Wicaksana 4th Floor, Jl. Ancol Barat VII Blok A 5 D No. 2, North Jakarta Utara 14430, Indonesia

Phone : +62-21-6901171  
Fax : +62-21-6900823  
Email : [ernanadi@pelinda.co.id](mailto:ernanadi@pelinda.co.id),  
[catur@pelinda.co.id](mailto:catur@pelinda.co.id),  
[niningfs@pelinda.co.id](mailto:niningfs@pelinda.co.id)  
Product : *Black Pencils, Oth. Pencils, Erasers of Rubber, Stationery*

## SOLO MURNI

Jl. A. Yani No. 378, Surakarta, Central Java 57143, Indonesia

Phone : +62-271-714505, 711044 (Hunting)  
Fax : +62-271-717009, 720810  
Email : [kiky@kiky.com](mailto:kiky@kiky.com), [export@kiky.com](mailto:export@kiky.com)  
Website : <http://www.kiky.com>  
Product : *Stationery, Paper & Paperboard*



## Australia (Canberra)

8, Darwin Avenue, Yarralumia  
Canberra, ACT 2600  
Phone : (+61-2) 62508600, 62508654  
Fax : (+61-2) 62730757, 62736017  
Email : nurimansyah@kemendag.go.id;  
atdag-aus@kemendag.go.id  
Website : www.kbri-canberra.org.au

## Belgium (Brussels)

Boulevard de la Woluwe 38, 1200 Brussels  
Phone : (+32-2) 7790915  
Fax : (+32-2) 7728190  
Email : olvyandrianita@kemendag.go.id;  
primebxl@skynet.be  
Website : www.embassyofindonesia.eu

## Canada (Ottawa)

55 Parkdale Avenue, Ottawa Ontario, K1Y 1E5  
Phone : (+1-613) 7241100 ext.307  
Fax : (+1-613) 7241105, 7244959  
Email : christoporos.barutu@kemendag.go.id;  
commerce@indonesia-ottawa.org  
Website : http://trade.indonesia-ottawa.org

## China (Beijing)

Indonesian Embassy Dongzhimenwai Dajie  
No. 4 Chaoyang District  
Phone : (+00861)65324748, 3811340842  
Fax : (+00861) 65325368  
Email : dandy@kemendag.go.id;  
atdag-chn@kemendag.go.id

## Denmark (Copenhagen)

OerehoejAlle 1, DK 2900 Hellerup,  
Copenhagen  
Phone : (+45) 39624422  
Fax : (+45) 39624483  
Email : ima.fatimah@kemendag.go.id;  
atdag@kbricph.dk

## Egypt (Cairo)

Embassy of the Republic of Indonesia  
13 Aisha El-Taimourea St, Garden City, Cairo  
Phone : (+20-2) 7944698  
Fax : (+20-2) 7962495  
Email : burmanrahman@kemendag.go.id;  
atdag-egy@kemendag.go.id

## France (Paris)

47-49, rueCortambert 75116 Paris  
Indonesian Mission to the European Union  
Boulevard  
Phone : (+33-1) 45030760, 45044872 ext. 418  
Fax : (+33-1) 45045032  
Email : moga.simatupang@kemendag.go.id;  
atdag-fra@kemendag.go.id

## Germany (Berlin)

c/o Embassy of the Republic of Indonesia  
LehrterStraße 16-1710557 Berlin  
Phone : (+49-30) 47807142  
Fax : (+49-30) 44737142,47807290

Email : lita.gustina@kemendag.go.id;  
trade@indonesian-embassy.de  
Website : www.indonesian-embassy.de

## India (New Delhi)

Embassy of the Republic of Indonesia 50-A  
Kautilya Marg Chanakyapuri110021  
Phone : (+91-11) 26114100  
Fax : (+91-11) 26885460  
Email : budi.santoso@kemendag.go.id;  
atdag.newdelhi@yahoo.com

## Italy (Rome)

Indonesian Embassy Via Campania 53-55  
Rome 00187  
Phone : (+39-06) 42009101  
Fax : (+39-06) 4880280  
Email : sumber.sinabutar@kemendag.go.id;  
indorom@indonesianembassy.it

## Japan (Tokyo)

Indonesian Embassy 5-2-9, Higashi Gotanda,  
Shinagawa-ku Tokyo 141-0002  
Phone : (+81-3) 34414201 ext. 321  
Fax : (+81-3) 34471697  
Email : julia.gustaria@kemendag.go.id;  
trade@kbritokyo.jp  
Website : www.shoumubu.kbri.jp

## Malaysia (Kuala Lumpur)

Indonesian Embassy No. 233 Jalan Tun Razak  
50400 Kuala Lumpur  
Phone : (+603) 21164000, 21164067  
Fax : (+603) 21167908, 21448407  
Email : fajarini.puntodewi@kemendag.go.id;  
atdag.kbrikl@gmail.com  
Website : www.kbrikualalumpur.org

## Netherlands (Den Haag)

Tobias Asserlaan82517 KC Den Haag  
Phone : (+86-10) 65325486/87/88  
ext. 3014, 3017, 3030  
Fax : (+86-10) 65325368, 65325783  
Email : rinaldi.agung@kemendag.go.id;  
atdag@indonesia.nl

## Philippines (Manila)

Indonesian Embassy 185 Salcedo Street,  
Legaspi Village Makati City  
Phone : (+632) 8925061/68  
Fax : (+632) 8925878, 8674192  
Email : irawan@kemendag.go.id;  
atdag-phl@kemendag.go.id

## Russia Federation (Moscow)

Indonesian Embassy Apt. 76,  
Entr. 3 Korovyval 7 Moscow 119049  
Phone : (+7-495) 2383014  
Fax : (+7-495) 2385281  
Email : heryono.prasetyo@kemendag.go.id;  
atdag-rus@kemendag.go.id

## Saudi Arabia (Ryadh)

Indonesian Embassy Riyadh Diplomatic  
Quarter P.O. Box 94343  
Phone : (+966-1) 4882800, 4882131 ext. 120  
Fax : (+966-1) 4882966  
Email : wawan.sudarmawan@kemendag.go.id;  
atdag-sau@kemendag.go.id

## Singapore

Embassy of the Republic of Indonesia  
7 Chatsworth Road Singapore 249761

Phone : (+65) 67375420  
Fax : (+65) 67352027  
Email : sugihsyah@kemendag.go.id;  
atdag-sgp@kemendag.go.id

## South Korea (Seoul)

Indonesian Embassy,380Yoidaebang-ro  
Yeongdeungpo-gu Seoul 150-895  
Phone : (+82-2) 7835675/7  
Fax : (+82-2) 7837750  
Email : aksamil.khair@kemendag.go.id;  
atdag-kor@kemendag.go.id

## Spain (Madrid)

Indonesian Embassy 65, Calle de Agastia  
28043 Madrid  
Phone : (+34) 914130294 ext. 223  
Fax : (+34) 91413899  
Email : elisa.rosma@kemendag.go.id;  
atdag-esp@kemendag.go.id

## Switzerland (Geneva)

IndonesiaPermanent Mission - Rue de Saint  
Jean 30 Geneva 1203  
Phone : (+41-22) 9401736  
Fax : (+41-22) 9401734  
Email : nugraheni.prasetya@kemendag.go.id  
Website : www.mission-indonesia.org

## Thailand (Bangkok)

Indonesian Embassy, 600-602 Petchburi Road,  
Rajthevi, Phayathai Bangkok -  
Thailand 10400  
Phone : (+66-2) 2523135/40 ext. 123  
Fax : (+66-2) 2551264, 2551267  
Email : atdag.bkk@gmail.com

## United Kingdom (London)

Embassy of Republic of Indonesia 38  
Grosvenor Square London W1K 2HW  
Phone : (+44-20) 74997661, 72909620  
Fax : (+44-20) 74957022  
Email : rita.rosiana@kemendag.go.id;  
atdag-gbr@kemendag.go.id

## United States of America (Washington DC)

2020 Massachusetts Avenue, NW  
Washington DC 20036  
Phone : (+1-202) 7755200/5352  
Fax : (+1-202) 7755354  
Email : reza.pahlevi@kemendag.go.id;  
commercial-attache.embassyofindonesia.org  
Website : www.embassyofindonesia.org

## KDEI (Taipei)

Indonesian Economic and Trade Office to Taipei  
TwinheadBld 6F No.550  
RuiGoang Road, eihu District Taipei 114,  
Taiwan ROC  
Phone : (+886-2) 87526170 ext. 637, 640  
Fax : (+886-2)87523706  
Email : ikhwan.aman@kemendag.go.id;  
kakdei-twn@kemendag.go.id  
Website : www.kdei-taipei.org

## Commercial Consul (Hongkong)

127-129 Leighton Road, 6-8 Keswick Street,  
Causeway Bay Hong Kong, P. R. Tiengkok  
Phone : (+852)-36510201, 28904421  
Fax : (+852) -28950139  
Email : kondag-hkg@kemendag.go.id;  
info@cgrihk.com

# Indonesian Trade Promotion Center (ITPC)

## BARCELONA

Calle Aribau 250, Bj.08006 Spain  
Phone : (+34) 934144662  
Fax : (+34) 934146188  
Email : info@itpc-barcelona.es  
Website : www.itpc-barcelona.es

## BUDAPEST

No. 101, 1<sup>st</sup> floor, ECE Building, 12 Bajcsy Zsilinszky Street Budapest, 1051 Hungary  
Phone : (+36-1) 3176382  
Fax : (+36-1) 2660572  
Email : inatrade@itpc-bud.hu  
Website : www.itpc-bud.hu

## BUSAN

#103, Korea Express Building, 1211-1 Choryang Dong, Dong-gu, Busan, South Korea 601-010  
Phone : (+82-51)4411708  
Fax : (+82-51)4411629  
Email : itpc-kor@kemendag.go.id  
Website : www.itpc-busan.com

## CHENNAI

3<sup>rd</sup> floor, Ispahani Center, 123/124, Nungambakkam High Road Chennai 600034  
Phone : (+91-44) 42089196  
Fax : (+91-44) 42089197  
Email : itpc.chennai@kemendag.go.id; itpcchennai@yahoo.com  
Website : www.itpcchennai.com

## CHICAGO

670 N Clark Street, 1<sup>st</sup> floor Chicago, IL 60654  
Phone : (+312) 6402463  
Fax : (+312) 6402648  
Email : itpc.chicago@itpcchicago.com  
Website : www.itpcchicago.com

## DUBAI

Al Masraf Tower 4th Floor  
Office No. 403 Baniyas Road, Deira  
P.O. Box 41664 United Arab Emirates  
Phone : (+971-4) 2278544  
Fax : (+971-4) 2278545  
Email : itpcdxb@emirates.net.ae  
Website : www.itpc-dubai.com

## HAMBURG

Glockengießerwall 17, 20095 Hamburg  
Phone : (+49-40) 33313280/81/83  
Fax : (+49-40) 33313282  
Email : info@itpchamburg.de  
Website : www.itpchamburg.de

## JEDDAH

Consulate General of the Republic of Indonesia  
Jeddah Al-Mualifin street, Al-Rehab District/5,  
P.O. Box 1021411  
Phone : (+966-2) 6711271  
Fax : (+966-2) 6730205  
Email : itpc.jed09@gmail.com

## JOHANNESBURG

7<sup>th</sup> floor The Forum, 2 Maude Street, Sandown  
Sandton 2146 South Africa  
Phone : (+27-11) 8846240  
Fax : (+27-11) 8846242  
Email : itpc@itpcjohannesburg.com; info@itpcjohannesburg.com  
Website : www.itpcjohannesburg.com

## LAGOS

5B, Anifowoshe Street, Off Odeola Odeku  
Street Victoria Island, Nigeria  
Phone : (+234-1) 4619865  
Fax : (+234-1) 4619862  
Email : itpclagos@yahoo.co.id; info@itpclgs.com  
Website : www.itpclgs.com

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## LOS ANGELES

3457 Wilshire Boulevard, Suite 101  
Los Angeles, CA 90010  
Phone : (+213) 3877041  
Fax : (+213)3877047  
Email : itpcla@sbcglobal.net; itpc-usa@kemendag.go.id  
Website : www.itpcla.com

## LYON

19 Boulevard Eugene Deruelle  
69003 Lyon, France  
Phone : (+33-4) 78606278  
Fax : (+33-4) 78606314  
Email : itpc.lyon@gmail.com  
Website : www.itpclyon.fr

## MEXICO CITY

Arquimedes No. 130, Oficina 105, Primer piso  
Col. Polanco Del. Miguel Hidalgo, C.P. 11570  
Ciudad de México  
Phone : (+52-55) 50836055/57  
Fax : (+52-55) 50836056  
Email : info@itpcmexicocity.mx  
Website : www.itpcmexicocity.mx

## MILAN

Via Vittor Pisani 8, 6<sup>th</sup> floor, 20124 Milano  
Phone : (+39-02) - 36598182  
Fax : (+39-02) - 36598191  
Email : info@itpcmilan.it  
Website : www.itpcmilan.it

## OSAKA

Matsushita IMP Building 2F 1-3-7, Shiromi,  
Chuo-ku Osaka 540-6302 Japan Nagahori  
Tsurumi Ryokuchi Line  
Osaka Business Park St. Exit 4  
Phone : (+06) 69473555  
Fax : (+06) 69473556  
Email : itpc.osaka@kemendag.go.id  
Website : www.itpc.or.jp

## SANTIAGO

Nueva Tajamar 481, Torre Sur, Oficina 706,  
Las Condes  
Phone : (+562) 4410494  
Fax : (+562) 4410495  
Email : itpc@itpcsantiago.cl  
Website : www.itpcsantiago.cl

## SAO PAULO

Edificio Park Lane, Alameda Santos  
No. 1787- Conj. 111-110 Andar  
Cerqueira César, ZIP: 01419-002 Brazil  
Phone : (+55-11)32630472  
Fax : (+55-11) 32538126  
Email : itpcsp@itpcsp.org  
Website : www.itpcsaopaulo.org

## SYDNEY

Level 2, 60 Pitt Street - Sydney  
New South Wales 2000 Australia  
Phone : (+61-2) 92528783  
Fax : (+61-2) 92528784  
Email : trade@itpcsydney.com  
Website : www.itpcsydney.com

## VANCOUVER

567 Seymour Street  
Vancouver, BC V6B 3H6, Canada  
Phone : (+1-604) 6966322, 5595021  
Fax : (+1-604) 5595022  
Email : itpc@indonesiavancouver.org  
Website : www.itpcvancouver.com



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Phone : +6221-3510-347/2352-8645

Fax : +6221-2352-8645

Email : tradexpoinonesia@kemendag.go.id

www.tradexpoinonesia.com

**CSC DGNED**  
Customer Service Center  
Directorate General of National Export Development | Ministry of Trade of The Republic of Indonesia

csc@kemendag.go.id  
csc kemendag  
@csckemendag  
+62 21-3510347

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