



trade with remarkable indonesia

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Dear Valued Readers.

Welcome to the June edition of the Export News which marks the first half of 2014. We do hope that you already achieved the targets set for the first six months of this year.

The June edition of Export News will discuss the potentials of Indonesian processed and canned food as an export commodity. Processed food has significant contribution to Indonesian non-oil and -gas export. Processed food products have been exported to both traditional and non-traditional markets.

Various types of food have been processed with interesting packaging and presentation to lure customers. The processed food are packaged in plastic, styrofoam and can to reach export destinations. In addition to paying attention to high quality and longer shelf-time, the export of processed food must also consider life style, economic, social and cultural factors in the destination markets. Such considerations are important to ensure a sustainable export.

The Directorate General for National Export Development at the Indonesian Ministry of Trade keeps publishing the Export News bulletin as part of its commitment to facilitate and underpin Indonesian businesses to enhance their export performances. The information provided in the Export News bulletin consisting of both product and market information. As usual, the June edition also comes with list of exporters of Indonesian canned food producers allowing direct contact with them to pursuit a fruitful business ties.

Thank You

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hot issue

Canning is a method of food preservation

Indonesian economy has managed to get through the global recession and become more balanced between investment market and huge consumption to spur export growth. The economy has recovered in the pas few years with a growth rate well above the average in the last decade. The gross domestic product (GDP) in 2013 grew by 5.78%, although not as good as 6.2% in 2012.

For economic growth, export trade is one of the supporting factors with plenty of Indonesian processed products from natural resources that have huge potentials to be developed as export commodities.

Previously, processed food sector was limited only to domestic market but its contribution to export has increased from US\$3.7 billion in 2009 to US\$5.7 billion in 2010 and was targeted to reach US\$6 billion in 2011. The Industry Ministry also set a target for an average growth rate of 8.4% until 2013.

Canning is a method of food preservation which is conducted by heating the food in an airtight container to



get a longer shelf life, typically up to 5 years. Under certain conditions, the shelf life can even be much longer. A freeze-dried canned product, such as canned dried lentils, could last as long as 30 years in an edible state.

The development of canned food can be traced back to 1975 when the French military offered a prize money of 12,000 francs for a new method of food preservation. Nicolas Appert was awarded the prize money in 1810 by Count Montlivert after proving the canning process during a series of tests conducted by the French Navy in 1806.

Initially, Appert used glass jars to preserve food although glass jars presented challenges during transportations. Glass jars were then replaced by cylindrical tin or wrought-iron canisters (later shortened to "cans") thanks to the works of Peter Durand in 1810. Unlike glass jars, cans are cheaper and quicker to make and much easier to transport. Glass jars, however, remained popular for certain premium products and at home-based canneries. Initially, there were no can openers forcing soldiers to cut the can open with their bayonets or smash them open with rocks.

The process was later on duplicated by other European countries as well as spreading across the Atlantic to the United States.



Canned Food Products

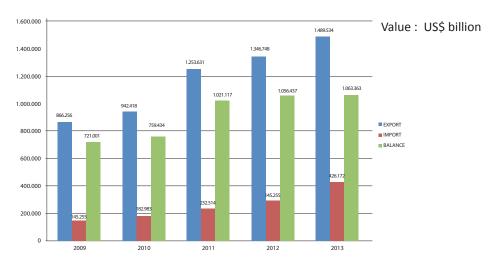


Market **Review**

Indonesia's total trade in the period of 2009-2013 showed a promising development with an average growth of 14.57%. In 2013, the total trade value was US\$369.18 billion consisting of oil and gas trade at US\$77.89 billion and non-oil and -gas trade at US\$291.28 billion.

of 15.26% in the 5-year period ending in 2013. The total export in 2013 was 329,155 tons with a value of US\$1.16 billion, increasing by 12.69% from export value in the previous year at US\$1.03 billion. Major destination countries for these products were

Indonesian Trade Balance for Canned Food 2009 - 2013



Source: Central Board of Statistics, prepared by Dit. of Market Dev. & Export Information, Dit. Gen. NED

The processed, canned food sector had a quite significant contribution for non-oil and -gas export sector growth in Indonesia's 2013 total export. The government keeps pushing the growth of national food and beverages industry as a strategic sector which provide huge contribution to the national economy.

Canned food industry includes fishery products such as fish, shrimp and various other types of seafood, vegetables and fruits, mushrooms and nuts. These products have not only met the domestic demand but can also compete in the international market.

Indonesian canned food products that have been exported to the international markets are grouped under various 2-digit Harmonized System (HS) categories such as HS 16 (meat, fish and seafood preparation nesoi (not elsewhere specified or indicated)), HS 08 (edible fruit, nuts, peel of citrus fruit, melons), HS 20 (vegetable, fruit, nuts etc food preparation) and HS 07 (edible vegetables and certain roots and tubers).

Export value of products grouped under the four HS categories showed an average annual growth

Australia, Italy, Germany, Japan, the Netherlands, Saudi Arabia, Singapore, Thailand, United Kingdom and the United States.

The largest export market in 2013 for Indonesian canned food products under the four HS categories were the United States with an export volume of 92,622 tons worth US\$454.89 million or increasing 25.75% from the previous year at US\$361.75 million. The figure constituted 39.05% from the total export of processed food. The export saw an average annual growth of 10.27% in the 2009-2014 period. In the first three months of 2014, the export value was recoded at US\$134.02 million.

The second largest destination was Japan with a volume of 27,984 tons worth US\$144.21 million for a share of 12.38%.

From all processed food products, canned seafood products, such as tuna, sardines, shrimp and crab, are dominating Indonsian export of processed food. In 2009-2013 period, export of processed seafood products contributed more than 70% of the total export of processed food. In 2013, the export value of processed seafood products was US\$989.10 million or 84.97% from the total export value of processed food at US\$1.16 billion. The figure showed and increase of 17.55% from the previous year.

The entire processed seafood products can be seen in the table below, grouped under the HS 1604 category:

including shrimps, tuna and fish canneries. In addition to optimizing existing processing plants, there are also efforts to develop fishery processing industry which are aimed to increase the added values therefore not only increasing products and

160520	Shrimps And Prawns, Prepared Or Preserved, Including Products Containing Fish Meat
160414	Tunas, Skipjack And Atlantic Bonito (Sarda Spp), Prepared Or Preserved, Whole Or In Pieces, But Not Minced
160510	Crab, Prepared Or Preserved, Including Products Containing Fish Meat
160413	Sardines, Sardinella And Brisling Or Sprats, Prepared Or Preserved, Whole Or In Pieces, But Not Minced
160420	Fish, Prepared Or Preserved, Nesoi, Including Products Containing Meat Of Crustaceans, Molluscs, Etc., And Fish Balls, Cakes And Puddings
160590	Molluscs And Other Aquatic Invertebrates (Clams, Abalone, Scallops, Squid, Etc.), Prepared Or Preserved, Including Products Containing Fish Meat
160415	Mackerel, Prepared Or Preserved, Whole Or In Pieces, But Not Minced
160419	Fish, Nesoi, Prepared Or Preserved, Whole Or In Pieces, But Not Minced
160250	Meat Or Meat Offal Of Bovine Animals, Prepared Or Preserved, Nesoi
160530	Lobster, Prepared Or Preserved, Including Products Containing Fish Meat

For Indonesia, fishery sector has a significantly high export potentials, supported by a geographical area which includes two oceans: the Indian and Pacific Oceans. Indonesia is as an important country for global fishery in terms of resources, habitat and international trade.

Fishery products under the HS 1604 category showed a steady annualized growth of 10.67% in the period of 2009-2013 in which Indonesia has huge potentials to meet the international demands. In 2013, the world's import reached US\$16.91 billion, increasing by 5.34% from US\$16.05 billion in the previous year. Considering that there are plenty of opportunities for Indonesian fishery products, efforts for fishery industrialization are continuously carried out such as optimizing fishery processing plants, increasing fishery capacity

export volume but also increasing added values from fishery products.

One of fishery products under HS 1604 category (prepared/preserved fish and caviar) is canned tuna (HS 160414). Tuna is a group of saltwater fish from the family Scombridae and especially the genus Thunnus.

The world's import for this product is quite high with an annualized growth of 13.72% in the 5-year period ending in 2013. The import value in 2013 was U\$\$8.32 billion or increasing by 7.78% from the import in 2012 at U\$\$7.72 billion. Canned tuna is the largest contributor in the H\$ 1604 category imported in 2013. Canned tuna import stood at 36.59% out of H\$ 1604's total import at U\$\$42.22 billion.

Market Review

The figures show that canned tuna has good opportunities in the world market. Indonesia is the world's third largest canned tuna producers after Thailand and the Philippines.

Other processed food products which have entered export market are canned fruits and canned nuts which are group under the HS 08 catgeory; preserved vegetables, fruits and nuts under HS 20; and vegetables, roots and tubers under HS 07.

Canned fruit and nut products under HS 08 category are rexported to Bangladesh, India, Malaysia, Pakistan, Singapore and Vietnam. The value and volume of this product is not very big but managed to exist in those countries. The export of products under HS 08 category increased by 4.04% from US\$401.86 million in 2012 to US\$418.08 million in 2013.

Products grouped under HS 08 category can be seen in a table shown below:

Indonesian processed food products have met quality standards required by destination countries such as Good Manufacturing Process, Hazard Analysis Critical Control Point (HACCP) and heavy metal content. Such compliance is needed to ensure entry into international market so as to maintain export sustainability. For processed sea products, a number of companies have also acquired Registration Number to be able to enter the United States market and Approval Number for European market. Therefore, to prevent being rejected into destination countries, Indonesian producers are maintaining and increasing the quality of their products according to prevailing regulations, such as fishing, processing to sanitation improvement.

Meanwhile, the Indonesian government keeps pushing the export of food and beverages products through promotion activities and entering various export destinations which are carried out by the

081290	Fruit, Nesoi And Nuts, Provisionally Preserved, But Unsuitable In That State For Immediate Consumption
081400	Peel Of Citrus Fruit Or Melons (Including Watermelons), Fresh, Frozen, Dried Or Provisionally Preserved

Other types of processed food include various kinds of vegetables, fruits, nuts and mushrooms which are grouped under HS 20 categoy with an export value of US\$204.14 million in 2013 and an annualized growth at 3.61% in the period of 2009-2013. Major markets for these products are Argentina, Japan, the Netherlands, Spain and the United States. In 2013, the export to the United States reached US\$56.20 million followed by the Netherlands at US\$18.44 million and Spain was third with US\$18.20 million.

Indonesian export of canned vegetables, fruits, nuts and other processed food include:

From the entire products included in the HS 20 category, processed potato products, including fried potato or preserved potato, have significant growth in the period of 2009-2013 at 462.26%. In 2013, the export reached US\$200,000 with major destinations included Australia, Hongkong, Japan, Malaysia, Singapore and South Korea.

National Export Development Directorate General at the Trade Ministry.

To increase the quality and quantity of exported processed fishery products and make them competitive in the international market, Indonesian producers are modernizing their equipment and adapt new production techniques. Such efforts include cultivating and harvesting fish and other sea products and various processing methods.

One of Indonesia's leading producers of canned food is PT Bali Maya Permai Food Canning Industry which focuses on canned fish products. Established in 1978, the company is a major Indonesian producer for quality canned mackarel, sardines and tuna.

After operating for more than three decades, the company is able to provide high quality product innovations and services to customers based on its vast experience.s

200820	Pineapples, Prepared Or Preserved, Whether Or Not Containing Added Sweetening Or Spirit, Nesoi
200811	Peanuts (Ground-Nuts), Prepared Or Preserved, Nesoi, Including Peanut Butter
200310	Mushrooms, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid
200819	Nuts (Other Than Peanuts (Ground-Nuts)), And Other Seeds, Including Mixtures, Prepared Or Preserved, Nesoi
200899	Fruit And Other Edible Parts Of Plants, Nesoi, Prepared Or Preserved, Whether Or Not Containing Added Sweetening Or Spirit, Nesoi
200892	Fruit Mixtures, Prepared Or Preserved, Whether Or Not Containing Added Sweetening Or Spirit, Nesoi
200599	Vegetables & Mixtures Of Vegetables (Excl. Of 2005.10-2005.91), Prepared/Preserved Othw. Than By Vinegar/Acetic Acid, Not Frozen, Other Than Products
200190	Vegetables, Fruit, Nuts And Other Edible Parts Of Plants, Nesoi, Prepared Or Preserved By Vinegar Or Acetic Acid
200410	Potatoes, Including French Fries, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Frozen
200600	Fruit, Nuts, Fruit-Peel And Other Parts Of Plants, Preserved By Sugar (Drained, Glace Or Crystallized)
200520	Potatoes, Nesoi, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Not Frozen
200490	Vegetables, Nesoi, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Frozen
200559	Beans (Vigna Spp., Phaseolus Spp.) Not Shelled, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Not Frozen
200390	Mushrooms Other Than Of The Genus Agaricus, Prepared/Preserved Othw. Than By Vinegar/Acetic Acid
200110	Cucumbers Including Gherkins, Prepared Or Preserved By Vinegar Or Acetic Acid

Employing more than 1,500 workers, Bali Maya Permai is able to process more than 80 tons of fish every day. Cold storage facilities allow the company to maintain a sufficient supply of fish. The company is also dedicated to improve the quality of its products and committed to reach customers satisfaction.

Another canned food producer is PT Great Giant Pineaple (GGP), the world's third largest producer and exporter of canned pineaple. PT GGP has a 35,000-hectare plantation in Terbanggi, Central Lampung, in Lampung province. The company produces 500,000 tons of canned pineaple, or 11,000 containers per year.

The canned pineapples are exported to 63 countries in 5 continents with the Americas receive

the lion's share of 40% with destinations such as Brazil, Canada, Mexico, Puerto Rico and the United States. Europe gets about 30% in country such as Austria, Belgium, France, Germany, Italy, the Netherlands, Scandinavian countries, Spain, Sweden and the United Kingdom. The remaining figure is for countries in the Middle East and Asia such as Australia, China, Hong Kong, Israel, Japan, Lebanon, Libya, Saudi Arabia, South Korea and United Arab Emirates.

PT GGP alwasys focuses on quality to maintain the customers's trust on its products being sold at the international market by meticulously monitor all production process to achieve high quality surpassing the tight international standards.

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