

PLASTIC HOUSEWARES



WHAT'S INSIDE

The Indonesian plastic industry, as a downstream petrochemical industry, has a prospective potentials both in domestic and international markets. The plastic consumption per capita in Indonesia is still low when compared to other countries in ASEAN providing huge growth opportunity at home. On the other hand, modern lifestyle gives way to the use of plasticwares which are considered to be more practical while at the same time being fashionable.

Advisor :

Nus Nuzulia Ishak

Editor in Chief :

Ari Satria

Managing Editor :

RA. Marlana

Editor :

Sugiarti

Writer :

Dwi Wiedhayati

Design :

Dewi

Editorial Addresses :

**DIRECTORATE GENERAL OF
NATIONAL EXPORT DEVELOPMENT**

Ministry of Trade Republic of Indonesia

Jl. Ml. Ridwan Rais No. 5

Jakarta 10110 – Indonesia

Phone : +62 21 3858171

Fax : +62 21 23528652

Email : p2ie@kemendag.go.id

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

Published by :

**DIRECTORATE GENERAL OF
NATIONAL EXPORT DEVELOPMENT**

Ministry of Trade Republic of Indonesia

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Dear Valued Readers,

Welcome to the March edition of Export News. We hope that you have reached all your target for the first quarter of 2014. The Directorate General of National Export Development (DGNED) of the Indonesian Ministry of Trade is publishing the Export News bulletin as a way to facilitate and facilitate Indonesian businesses to enhance their export performances.

In this edition, we are discussing Indonesian plastic houseware products, especially its export performance and other useful information. Plastic products have been used widely from housewares, automotive and electronic components to packaged products. The Ministry of Trade has designated plastic products as one of prospective Indonesian export products in 2014-2015. Modern lifestyle is marked with varied demands and desires leading to efforts to fulfill them. One example is the need for light and durable housewares such as those made of plastic.

Indeed, Indonesian export of plastic houseware goods is still small and fluctuative. The export figure in 2013 was US\$45.56 million or decreasing by 4.78% from US\$47.85 million in the previous year. However, Indonesian market share experienced a positive annualized growth of 3.53% in the 2009-2013 period. Nevertheless, having a complete supply chain from raw materials to end products, Indonesia is poised to become a major player in the international market.

We hope you can make informed decisions to buy plastic housewares from Indonesian manufacturers. As usual, a list of exporters is included so that you can contact them directly.

Thank You

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hot issue

PLASTIC HOUSEWARES

Domestic plastic industry has recorded impressive growth and absorbed huge workforce. With the ASEAN Free Trade and world free market are fully in place, plastic products from other countries, such as Tupperware, Rubbermaid and Lock and Lock, are readily available in Indonesia. To keep its competitive edge against imported products, domestic manufacturers of plastic products must apply creative approaches and put some innovations on their products.

The development of plastic industry must become a priority to increase the national economic resilience. Plastic industry can forge partnership with anyone including end users instead of being dependent on one large industry but can competitively server a number of large industries simultaneously or being independent by becoming a major retailer for its own products. Plastic industry does not need complex infrastructure for its development

and advancement. Due to the market characteristics it possesses, plastic industry has huge opportunities to compete in the export market.

In addition to household goods, plastic is also widely used in packaging such as for food and drink, cosmetics, electronics, pharmaceuticals, automotive, chemical, agriculture, lubricants and many others. Therefore, there are plenty of market opportunities for plastic products.

History of plastic

Plastics can be described as moldable materials made of a wide range of synthetic or semi-synthetic organic solids. They are usually synthetic, usually made from petrochemicals although many are also partially natural.

The first man-made plastic was the Parkesine, which was patented by Alexander Parkes in 1856 in Birmingham, the United Kingdom. Parkesine, which resembles ivory, has the characteristics similar to rubber but is made of organic cellulose materials. Parkesine was made from cellulose treated with nitric acid and a solvent, resulting in cellulose nitrate or pyroxilin. Cellulose nitrate could be dissolved in alcohol and hardened into a moldable transparent and elastic material when heated.

Parkesine was first introduced at the 1862 Great International Exhibition in London where Parkesine won a bronze medal. Parkes established the Parkes Company in 1866 to produce goods based on his research and market them. The Parkesine products include medallions, trays, knife handles and beads. However, the company went bankrupt as the prices were too high while other account described that the goods had poor quality as Parkes was trying to cut costs.

Parkesine is also known by its generic name celluloid and pyroxilin. Parkes' associate, Daniel Spill, established the Xylonite Co. to take over the former's patents and patented the Xylonite in 1869. Meanwhile in the United States, John Wasley Hyatt improved Parkesine by mixing nitrocellulose with camphor to simplify the process to manufacture

celluloid. This invention was patented in 1870.

The Indonesian industry making houseware goods made of plastic has the possibility to grow larger than those in other countries. Plastic has several advantages when compared to other materials such as moldable depending on needs and requirement; lightweight thus saving transportation costs; durable; safe from chemical and water contaminations; can be used safely as food and drink containers; can withstand weather and temperature changes; and more importantly the price is low.

Indonesia already locally produces main raw materials for plastic, such as polyethylene (PE), polypropylene (PP), polystyrene (PS), and polyvinyl chloride (PVC resin). PT Petrokimia Nusantara Interindo (PEN) and PT Chandra Asri Petrochemical (CAP), for example, produce polyethylene. PT PEN is the first polyethylene maker in Indonesia starting its operation in 1993. PT CAP is an integrated olefin project. In addition to producing polyethylene, PT CAP also produces ethylene which is the raw material in the production of polyethylene, propylene and polypropylene.

Domestic production of plastic raw materials is increasing inline with the development of the user industries, especially those manufacturing plastic goods, electronics and electrical devices.



INDONESIA SUPPLIES PLASTIC HOUSEWARES

Market Review

Indonesia supplies plastic housewares to the global market although the contribution is still relatively small. The household goods are categorized under the Harmonized System (HS) 3924 as described below:

Plastic housewares based on 6-digit HS Code

HS	Product description
392490	Household Articles Nesoi (Other Than Tableware And Kitchenware) And Toilet Articles, Of Plastics
392410	Tableware And Kitchenware Of Plastics

Despite the fact that the supply of Indonesian plastic housewares is still low when compared to other ASEAN country members, such as Singapore, Indonesia still has a lot of potentials.

The structure of Indonesian plastic industry is relatively complete from upstream to downstream despite the lack of plastic raw materials such as polypropylene and polyethylene which still have to be imported. Therefore the government pushes for the integration of plastic industry with petrochemical industry to strengthen the plastic industry in its upstream to downstream sectors.

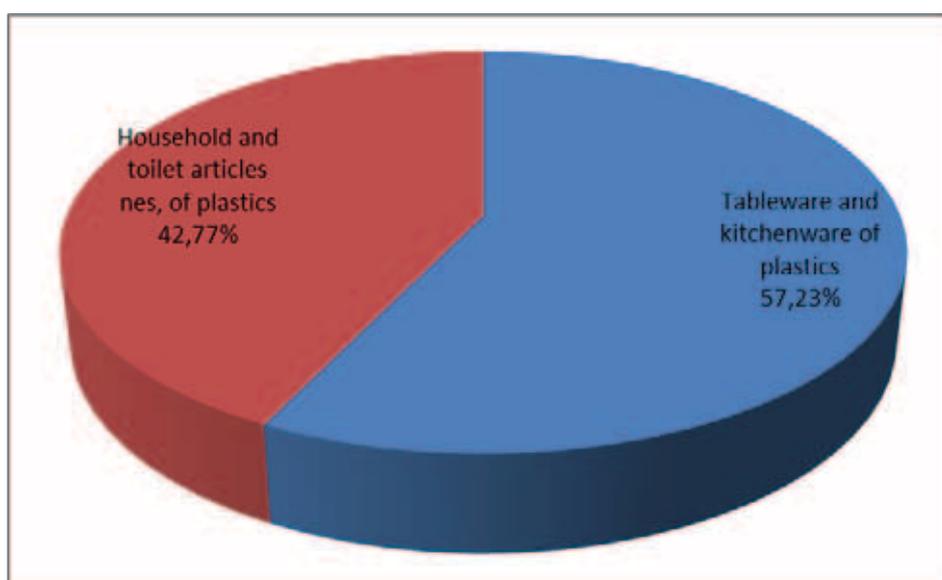
The government also provides tax holiday, tax allowance and lifting of import duties for capital goods and support the development of human resource.

The global market of houseware goods made of plastic grew by 1.08% in 2012 with the import value reaching US\$14.88 billion when compared to US\$14.73 billion in 2011. The figures show that world consumptions on plastic products is on the rise.

Plastic goods grouped under the Tableware and Kitchenware of Plastics (HS 392410) dominated the overall demand with 57.23% while Household and Toilet Articles Nesoi (Not elsewhere specified or included), of Plastics (HS 392490) was 42.77%.

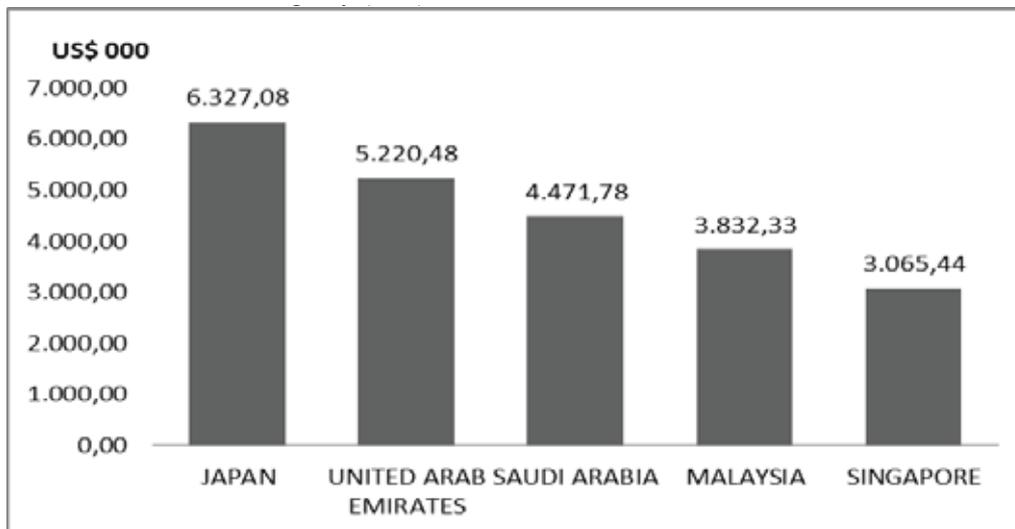
The global market of plastic housewares is dominated by China which supplied US\$3.85 billion worth of goods in 2012, or 32.05% of the total market value. The United States was second with US\$875 million for a market share of 7.28% and followed by Germany at the third place with US\$657 million (5.47%), Italy with US\$618 million (5.14%) and Hong Kong with US\$519 million (4.32%). Indonesia's contribution in 2012 was still very low at US\$47.85 million for a market share of 0.40%.

World Import of Housewares Made of Plastic Based on 6-digit HS



Sumber: ITC calculations based on UN COMTRADE statistics

Indonesia's Top 5 Export Destinations for Housewares made of Plastic in 2013



Sumber: Central Statistics Agency (BPS)

Based on data from the Central Statistics Agency (BPS), Indonesian supply of plastic housewares to the world market is still fluctuative. The export figure in 2013 was US\$45.56 million or decreasing by 4.78% from US\$47.85 million in the previous year. However, Indonesian market share experienced a positive annualized growth of 3.53% in the 2009-2013 period.

Indonesian export of plastic housewares in 2013 was focused to countries in Asia and the Middle East such as Japan, which became the top export destination with US\$6.33 million or 13.89% of total export. The United Arab Emirates was the second biggest destination with an export of US\$5.22 million (11.36%) and followed by Saudi Arabia with US\$4.47 million (9.82%) and Singapore with US\$3.1 million (6.73%).

Indonesia still has the potentials in developing plastic industry as demand is increasing steeply year after year. The steep increase is fueled by the relatively low plastic consumption in Indonesia at 10 kilogram per capita while the consumption in other ASEAN country members, such as Malaysia, Singapore and Thailand, has reached 40 kg per capita.

One of Indonesian companies which has exported plastic housewares is PT Maspion. The company

also manufactures various other household goods such as kitchenware, glassware, and home appliances. Maspion is widely known in the world as an Original Equipment Manufacturer (OEM), supplying a number of retail and wholesale stores in the United States and other major countries. The company has production facilities spread in four locations in Sidoarjo and Gresik, East Java; and one factory in Jakarta.



PLASTIC HOUSEWARES

Plastic housewares should be safe and certified by relevant authorities to ensure their quality. A number of institutions declaring plastic housewares as safe to be used in packaging or household usage include:

1. UNITED STATES FOOD AND DRUG ADMINISTRATION (FDA)

The US FDA regulates policies on safety standard for plastic to store, prepare and serve food. FDA also regulates standards on the allowed maximum content of indirect food additives at containers if there are contacts with food and beverages being consumed by humans.

2. EUROPEAN FOOD SAFETY AUTHORITY (EFSA)

The EFSA is tasked to provide scientific guidance on possible dangers on various food containers and packagings. One of the fields cover direct and indirect effects of food and its packing toward human health.

3. JAPAN HYGIENIC OLEFIN AND STYRENE PLASTICS ASSOCIATION (JHOSPA)

JHOSPA regulates safe threshold for materials being used in plastic container products which have direct contact with food and beverages.

4. JAPAN FOOD SAFETY COMMISSION (JFSC)

JFSC issues scientific guidances on safe threshold for products which have direct contact with food and beverages and communicate them with the consumers.

5. SOCIETY OF PLASTIC INDUSTRY (SPI)

The SPI groups companies in the plastic industry in the United States and represents its members in regulating policies on the benefits of plastic products and communicate the contributions of plastic industry to the public.

6. FOOD AND DRUG MONITORING AGENCY (BPOM)

The Indonesian Food and Drug Monitoring Agency (BPOM) is responsible to regulate and monitor food and drug. The BPOM also monitors packagings which have direct contact with food and beverages being consumed by the public in Indonesia, including plastic containers. From its monitoring, the BPOM provides information to the public if a certain container is potentially hazardous to the public health.

PLASTIC HOUSEWARES

LIST OF EXPORTERS



LANGGENG MAKMUR INDUSTRI, PT

Head Office/Factory I
256, Letjen Sutoyo, Waru
Phone : (62-31) 8533688 (Hunting),
Fax : (62-31) 8533588
Sidoarjo, East Java 61256

Branch Office/Factory III (Jakarta)

18, Faliman Jaya, Kampung Rawa Bamban, Desa Juru Mudi,
Kecamatan Benda
Phone : (62-21) 5459068-9, 5451864, 6191103
Fax : (62-21) 5451863
Tangerang, Banten 15124

SEMESTA RAYA ABADI JAYA, PT

Jl. Kalimati Kulon No. 18 (Pasar Terang)
Surabaya
Phone : (62-31) 3507213, 3551335
Fax : (62-31) 3551335

CAHAYA PERDANA PLASTICS, PT

Jl. Bandengan Selatan No. 82/DO, Jakarta 14450
Phone : (62-21) 6617050, 6660333
Fax : (62-21) 6603841, 6603842, 6611267
Email : lionstar@rad.net.id

KIRANA PACIFIK LUAS. PT (CLARIS)

Jl. Pluit Karang Karya Blok A Selatan No. 28, Jakarta 144570
Phone : (62-21) 6682891, 66
Fax : (62-21) 6682892
Email : claris@cbn.net.id

IMAWI BENJAYA, PT

Graha Irama, 16th Floor Room G-H,
Jl. HR. Rasuna Said, Blok X-1, Kav 1-2,
Kuningan, Jakarta 23950
Trading Name: Tupperware
Phone : (62-21) 5261461
Fax : (62-21) 5261458, 5261459

RIA STAR INDONESIA, PT

Jl. Raya Rungkut No. 27
Surabaya, East Java 60293
Phone : (62-31) 8700142, 8703613
Fax : (62-31) 8700508, 8700278

MASPION, PT

Jakarta Office
Maspion Plaza, 15-18th Floor
Gunung Sahari Kav 18, Jakarta 14420
Phone : (62-21) 64701000
Fax : (62-21) 64701066
email : mspjkt@maspion.co

TRISINAR INDOPRATAMA, PT

Duta Harapan Indah Complex, Block E/19
Jl. Kapuk Muara No. 7, Jakarta 14460
Phone : (62-21) 6605772, 6605285 5866838
Fax : (62-21) 6625530, 5845905
Email : technoplast@gmail.com,
technoplast@attglobal.net, export@trisinar.com

DIAN MINDO MEGAH, PT

Jl. Raya Kemuning KM. 2, jatiuwung,
Tangerang, Banten 15131
Phone : (62-21) 5516212
Fax : (62-21) 5513390

PT. SINGA BERLINA, PT

Jl. P. Tubagus Angke Tt. 015/10, Jelambar Grogol
Petamburan, Jakarta Barat, DKI 11460
Phone : (62-21) 5664441, 5676201
Fax : (62-21) 5664368

ASIA PLASTIK, CV

Jl. Rungkut Industri III No. 27 A, Surabaya, East Java 60292
Phone : (62-31) 8439145, 8439998, 8433078
Fax : (62-31) 8492889

Australia (Canberra)

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

Belgium (Brussels)

Boulevard de la Woluwe 38, 1200 Brussels
Telp. : (+322) - 7550120
Fax. : (+322) - 7728190
Email : atdag-blx@kemendag.go.id
Website : www.embassyofindonesia.eu

Canada (Ottawa)

55 Parkdale Avenue, Ottawa
Ontario, K1Y 1E5
Telp. : (+1-613) - 7241100 ext. 306
Fax. : (+1-613) - 7241105, 7244959
Email : atdag-can@kemendag.go.id
Website : www.indonesia-ottawa.org

China (Beijing)

Indonesian Embassy DongzhimenwaiDajie No.
4 Chaoyang District
Telp. : (+00861) - 65324748, 3811340842
Fax. : (+00861) - 65325368
Email : atdag-chn@kemendag.go.id
Website : -

Denmark (Copenhagen)

Oerehoej Alle 1, DK 2900 Hellerup
Telp. : (45) - 39624422 ext. 215
Fax. : (45) - 39624483
Email : atdag-dnk@kemendag.go.id
Website : -

Egypt (Cairo)

Embassy of the Republic of Indonesia
13 Aisha El-Taimoureya St, Garden City
Telp. : (+20-2) - 7944698
Fax. : (+20-2) - 7962495
Email : atdag-egy@kemendag.go.id
Website : -

France (Paris)

47-49, rueCortambert 75116 Paris
Indonesian Mission to the European Union
Boulevard
Telp. : (+33-1) - 450302760 ext. 418,
45044872
Fax. : (+33-1) - 45045032
Email : atdag-fra@kemendag.go.id
Website : -

Germany (Berlin)

c/o Embassy of the Republic of Indonesia
LehrterStrabe 16-17 10557
Telp. : (+49-30) - 47807142
Fax. : (+49-30) - 44737142, 47807290
Email : atdag-deu@kemendag.go.id
Website : www.indonesian-embassy.de

India (New Delhi)

Embassy of the Republic of Indonesia 50-A
Kautilya Marg Chanakyapuri110021
Telp. : (+91-11) - 26114100

Fax. : (+91-11) - 26885460
Email : atdag-ind@kemendag.go.id
Website : -

Italy (Rome)

Indonesian Embassy Via Campania53-55
Rome 00187
Telp. : (+39-06) - 42009101
Fax. : (+39-06) - 4880280
Email : atdag-ita@kemendag.go.id
Website : -

Japan (Tokyo)

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

Malaysia (Kuala Lumpur)

Indonesian Embassy No. 233 Jalan Tun Razak
Malaysia 50400
Telp. : (+603) - 21164000, 21164067
Fax. : (+603) - 21167908, 21448407
Email : atdag-mys@kemendag.go.id
Website : www.kbrikualalumpur.org

Netherlands (Den Haag)

Tobias Asserlaan8 2517 KC Den Haag
Telp. : (+86-10) - 65325486/87/88
ext. 3014/3017/3030
Fax. : (+86-10) - 65325368, 65325783
Email : atdag-nld@kemendag.go.id
Website : -

Philippines (Manila)

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

Russia Federation (Moscow)

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

Saudi Arabia (Riyadh)

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

Singapore

Embassy of the Republic of Indonesia
7 Chatsworth Road Singapore 249761
Telp. : (+65) - 67375420
Fax. : (+65) - 67352027
Email : atdag-sgp@kemendag.go.id
Website : -

South Korea (Seoul)

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

Spain (Madrid)

Indonesian Embassy 65, Calle de Agastia
28043 Madrid
Telp. : (+34-91) - 4130294 ext. 223
Fax. : (+34-91) - 413899
Email : atdag-esp@kemendag.go.id
Website : -

Switzerland (Geneva)

Indonesia Permanent Mission - Rue de Saint
Jean 30 Geneva 1203
Telp. : (+41-22) - 9401736
Fax. : (+41-22) - 9401734
Email : atdag-che@kemendag.go.id
Website : www.mission-indonesia.org

Thailand (Bangkok)

Indonesian Embassy 600-602 Petchburi Road,
Rajthevi, Phayathai P.O. Box 10400
Telp. : (+66-2) - 2523135/40 ext. 123
Fax. : (+66-2) - 2551264, 2551267
Email : atdag-tha@kemendag.go.id
Website : www.kemlu.go.id/bangkok

United Kingdom (London)

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

United States of America (Washington DC)

2020 Massachusetts Avenue, NW
Washington DC 20036
Telp. : (+1-202) - 7755350,
7755200 ext. 350
Fax. : (+1-202) - 7755354, 7755365
Email : atdag-usa@kemendag.go.id
Website : www.inatrade-use.org

KDEI (Taipei)

Indonesian Economic and Trade Office to Taipei
TwinheadBld 6F No.550RuiGoang Road, eihu
District
Taipei 114, Taiwan ROC
Telp. : (+886-2) - 87526170 ext. 34
Fax. : (+886-2) - 87523170
Email : kakdei-twn@kemendag.go.id
Website : www.kdei-taipei.org

Commercial Consul (Hongkong)

Indonesian General Consulate 127 - 129
Leighton Road , 6 - 8 Keswick Street
Telp. : (+852) - 28904421, 28902481
Fax. : (+852) - 28950139
Email : kondag-hkg@kemendag.go.id
Website : -

WORLD WIDE

Indonesian Trade Promotion Centre (ITPC)

BARCELONA

Calle Aribau 250, B.I. 08006 Spain
Telp. : (+34) -934144662
Fax. : (+34) -934164188
Email : info@itpcbcn.com
Website : www.itpcbcn.com

BUDAPEST

Bajcsy-Zsilinszky ut.12, 1st floor, 101
Budapest 1051
Telp. : (+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
Telp. : (+82-51) - 4411708
Fax. : (+82-51) - 4411629
Email : itpc-kor@kemendag.go.id
Website : www.itpc-busan.com

CHENNAI

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

CHICAGO

670 N Clark St, 1st floor
Chicago, IL 60654
Telp. : (+312) - 6402463
Fax. : (+312) - 6402648
Email : itpc.chicago@itpcchicago.com;
itpc-chicago@kemendag.go.id
Website : www.itpcchicago.com

DUBAI

Al Masraf Tower, 4th floor, #403 Baniyas Street,
Deira P.O. Box 41664
Telp. : (+9-714) - 2278544
Fax. : (+9-714) - 2278545
Email : itpcdxb@emirates.net.ae
Website : http://itpcdubai.com

HAMBURG

Glockengiesserwall 17, 20095 Hamburg
Telp. : (+49-40) - 33313280/1
Fax. : (+49-40) - 33313282
Email : info@itpchamburg.de;
itpc-deu@kemendag.go.id
Website : www.itpchamburg.de

JEDDAH

Consulate General of the Republic of Indonesia
Jeddah
Al-Mualifin street, Al-Rehab District/5, P.O. Box
21411
Telp. : (+966-2) - 6711271
Fax. : (+966-2) - 6730205
Email : itpc.jed09@gmail.com;
itpc-sau@kemendag.go.id
Website : -

JOHANNESBURG

7th floor The Forum, 2 Maude Street, Sandown
Sandton - Republic of South Africa 2146
Telp. : (+27-11) - 8846240
Fax. : (+27-11) - 8846242
Email : itpc@itpcjohannesburg.com;
itpc@itpcjhb.co.za
Website : www.itpcjohannesburg.com

LAGOS

5th, Anifowoshe Street Victoria Island
Telp. : (+234-1) - 4619864/65/62
Fax. : (+234-1) - 2613301
Email : itpclagos@yahoo.co.id;
itpc-nga@kemendag.go.id
Website : www.itpclagos.com

LOS ANGELES

3457 Wilshire Blvd, Suite 101
CA 90010
Telp. : (+1-213) - 3877041
Fax. : (+1-213) - 3877047
Email : itpcla@sbcglobal.net;
itpc-usa@kemendag.go.id
Website : www.itpcla.com

LYON

L'Europeen, 19 Bld Eugene Deruelle 69003
France
Telp. : (+33-4) - 78606278
Fax. : (+33-4) - 78606314
Email : itpc.lyon@gmail.com
Website : www.itpclyon.fr

MEXICO CITY

Cenit Plaza Arquimedes, A.C Arquimedes No.
130, Office 105
Col Polanco Deleg Miguel Hidalgo, C.P 11570
Telp. : (+52-55) - 50836055/67
Fax. : (+52-55) - 50836056
Email : itpc.mexicocity@yahoo.com;
itpc-mex@kemendag.go.id
Website : www.itpcmexicocity.mx

MILAN

Via Vittor Pisani 8-6 floor, 20124
Telp. : (+39-02) - 36598182
Fax. : (+39-02) - 36598191
Email : itpcmilan@live.it;
itpc-ita@kemendag.go.id
Website : www.itpc-milan.com

OSAKA

ITM 4-J-8 Asia and Pacific Trade Center, 2-1-10
Nanko Kita, Suminoe-ku
Osaka 559-0034
Telp. : (+81-6) - 66155350
Fax. : (+81-6) - 66155351
Email : itpc.osaka@kemendag.go.id
Website : www.itpc.or.jp

SANTIAGO

Nueva Tajamar 481, Torre Sur, Oficina 706, Las
Condes
Telp. : (+562) - 4410494
Fax. : (+562) - 4410495
Email : itpc@itpcsantiago.cl;
itpc-chl@kemendag.go.id
Website : www.itpcsantiago.cl

SAO PAULO

Edificio Park Lane, Alameda Santos No. 1787-
Conj. 111-11o Andar
Cerqueira Cesar - CEP.01419-002
Telp. : (+55-11) - 32630472, 35411413
Fax. : (+55-11) - 32538126
Email : itpcsp@itpcsp.org;
itpc-bra@kemendag.go.id
Website : -

SYDNEY

Level 2, 60 Pitt Street - Sydney, New South
Wales 2000
Telp. : (+61-2) - 92528783
Fax. : (+61-2) - 92528784
Email : trade@itpcsydney.com;
itpc-aus@kemendag.go.id
Website : www.itpcsydney.com

VANCOUVER

Georgia Business Center, 1300-1500 West
Georgia Street
Vancouver, British Columbia, Canada V6G 2Z6
Telp. : (+1-604) - 6966322
Fax. : (+1-604) - 6851520
Email : itpc@indonesiavancouver.org;
itpc-can@kemendag.go.id
Website : www.itpcvancouver.net



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Phone : +6221-2352-8644

Fax : +6221-2352-8645

Email : tradexpoindonesia@kemendag.go.id

www.tradexpoindonesia.com



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