

trade with remarkable indonesia



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Dear Valued Readers

We meet again in this July 2012 edition of Export News. We believe that you already have a successful first half of the year. In this edition, the Directorate General Nasional for Export Development (DGNED), Ministry of Trade, Republic of Indonesia, features another important export commodity from Indonesia: Artificial staple fibers (not carded).

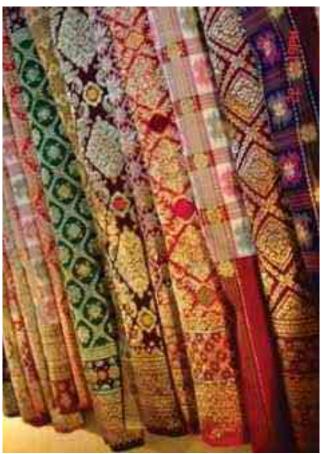
Indonesia has been the world's largest exporter of Artificial staple fibers (not carded) since 2008, replacing China which was the largest exporter in 2007. Most of Indonesian Artificial staple fiber (not carded) products were exported to Turkey at US\$100.58 million followed by China worth US\$93.29 million, Pakistan (US\$51.07 million), India (US\$46.44 million) and most interestingly to Israel (US\$37.94 million).

As usual, we provide the readers with Indonesia's export performance and producers of Artificial staple fibers (not carded) to allow foreign buyers conduct initial contact. We expect you to find this edition useful for establishing contact with Indonesian producers of Artificial stable fibers (not carded).

Thank you

In this issue





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Textile Production

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hot issue

Artificial staple fibers

In the Indonesian archipelago, with more than 17,000 islands, weavers have long used many of the world's known techniques of textile production, and almost every ethnic group has a legend telling how the art of weaving was brought by a Celestial

Being. Traditionally, village women were in charge of all the process: collecting plant fibers and forming them into threads, dyeing with natural substances, installing the looms, and patterning through weaving, resist-dyeing techniques, and other means of decoration.

Hot Issue



A major goal of textiles might be to illustrate ethnic identity or lineage, offer spiritual protection, act as a link to the gods, announce the status of the wearers, or a picture of the local culture. Currently, the use of woven clothes, which are originally used for cultural and religious days, have shifted so that consumers also used woven clothes daily. Produced and full of information about the political alliances, cosmic beliefs, customs are respected, technical knowledge, social structure, trade relations, and sometimes even historical events. The best examples of traditional Indonesian textiles and cultural complexity of generating a crossroads in this area, shaped by influences from China, India, Europe and the Middle East.

Indonesia has a varied range of spectacular works from most parts of the archipelago such as those from western Indonesia, including Bali, Java, and Sumatra, as well as from eastern Indonesia including Kalimantan, Flores, Sulawesi, Sumba, Timor, Babar, Lembata, and Savu.

With the advancement of science and technologies, especially in the field of chemistry, people are starting to move from the natural, traditional types of textiles to the synthetic ones.

Natural yarns could come from cotton, rayon, jute, wooden, silk and linen while synthetic ones include

nylon, polyester, rayon and acrylic yarns.

Rayon yarns are processed from synthetic fibers which are regenerated that they are the same in structure as other cellulose fibers. One of the natural characteristic of rayon fiber is that it is highly dazzling and its color is whiter than cotton yarn.

There are two types of rayon yarns:

- Filament Rayon yarn, which is produced from a group of 15 -120 rayon fibers having limitless length excepting for fabric having certain effect such as voile and crepe.
- Staple Rayon yarn, which is produced from cuts of filament rayon with certain length to fit with the length of cotton fiber or woolen fibers to be spun.

Generally the rayon yarn is used as follows:

- Rayon yarn from cuprammonium rayon fiber is used specially as basic material for soft fabric with high quality, stockings and lady's underwear (lingerie), knitted undershirts and woven batik shirts.
- Rayon yarn from viscose rayon fibers is sued for embroidered garments and for layer.



Indonesian

Artificial staple fibers, not carded, combed etc.

in the World Market



World Market

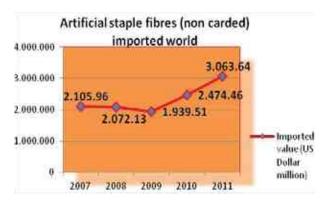
Imports

The world imports of Artificial staple fibers (not carded) fluctuated in the period of 2007-2011 with an average growth trend of 9.71%. There was a decreasing trend from 2007 to 2009 before picking up in 2010 and 2011 with stronger results.

In 2007, the world imported US\$2.10 billion of Artificial staple fibers (not carded) but decreased slightly to US\$2.07 billion and US\$1.93 billion in 2008 and 2009 respectively. The decrease was

largely due to the global financing crisis hitting the USA and Europe. The imports, however, started to rebound in 2010 as many countries regained their growth in a recovery.

With the world economy was recovering, there was a considerable jump to US\$2.47 billion in 2010 and followed by 23.81% increase in 2011 to US\$3.06 billion in 2011.



Sources: ITC calculations based on UN COMTRADE statistics.

As can be seen in the graph above, the world imports of Artificial staple fibers (not carded), experienced a rather flat decrease from 2007 to 2009 before enjoying robust growth figures in 2010 and 2011.

Among the top importing countries in 2011 were Turkey, China, the United Staes, Pakistan and South Korea.

Turkey was the largest importing country in the 2007-2011 period, jumping from US\$435.97 million in 2007 to US\$689.95 million in 2011 for a 21.67% growth while China was second with a 15.67% average growth from US\$151.60 million to US\$479.92 million in the same period. China,

Market Review

however, had the second largest year-on-year growth of 60.71% from US\$298.63 million in 2010 to US\$479.92 million.

Indonesia had the largest year-on-year growth of 63.35% from US\$61.12 million in 2010 to US\$99.84 million in the following year. In total, Indonesia had an average growth of respectable 16.14% from US\$60.66 million to US\$99.84 million in the 2007-2011 period.

The Top 15 importing countries can be seen in the table below:

On the other hand, imports from China, Vietnam, Indonesia and India showed strong increase from 2008 to 2009 despite the global financial crisis, perhaps due to strong domestic demands.. China's import increased from US\$178.65 million in 2008 to US\$227.39 million in the following year while Indonesia increased its imports from US\$37.09 million to US\$53.30 million. India's imports were increased from US\$34.34 million to US\$50.35 million.

| NT. | G 4: | In | nported va | lue (US Dolla | Trend | Growth | Share % | | |
|-----|---------------|---------|---------------------|---------------------|---------|----------|--------------|--------------|--------|
| No | Countries | 2007 | 2008 | 2009 | 2010 | 2011 | % (07-11) | % (10-11) | (2011) |
| | | 2.105.9 | 2.072.1 | | 2.474.4 | 3.063.63 | | | |
| | All Countries | 57 | 27 | 1.939.507 | 60 | 9 | 9,71 | 23,81 | 100 |
| 1 | Turkey | 435.972 | 412.925 | 399.159 | 567.085 | 689.956 | 13,15 | 21,67 | 22,52 |
| 2 | China | 151.602 | 178.656 | 227.395 | 298.634 | 479.926 | 32,56 | 60,71 | 15,67 |
| 3 | USA | 254.389 | 255.137 | 209.323 | 228.513 | 255.342 | -1,02 | 11,74 | 8,33 |
| 4 | Pakistan | 87.334 | 118.300 | 90.061 | 157.845 | 204.447 | 22,01 | 29,52 | 6,67 |
| | Republic of | | | | | | | | |
| 5 | Korea | 110.398 | 126.182 | 109.929 | 127.589 | 168.206 | 8,91 | 31,83 | 5,49 |
| 6 | Germany | 126.845 | 124.384 | <mark>96.417</mark> | 101.330 | 122.458 | -2,72 | 20,85 | 4,00 |
| 7 | Viet Nam | 37.386 | 39.038 | 69.656 | 84.193 | 111.109 | 34,27 | 31,97 | 3,63 |
| 8 | Indonesia | 60.663 | 37.093 | 53.305 | 61.121 | 99.840 | 16,14 | 63,35 | 3,26 |
| 9 | France | 82.292 | 69.746 | 53.754 | 63.101 | 77.881 | -2,08 | 23,42 | 2,54 |
| | Chinese | | | | | | | | |
| 10 | Taipei | 40.677 | <mark>55.254</mark> | <mark>49.734</mark> | 57.304 | 77.703 | 14,24 | 35,60 | 2,54 |
| 11 | Italy | 102.810 | 94.213 | <mark>47.873</mark> | 62.681 | 72.061 | -10,58 | 14,96 | 2,35 |
| 12 | Israel | 60.716 | 0 | 50.652 | 61.410 | 71.365 | - | 16,21 | 2,33 |
| 13 | Japan | 41.775 | 58.226 | 31.162 | 43.009 | 56.571 | 3,08 | 31,53 | 1,85 |
| | Iran (Islamic | | | | | | | | |
| 14 | Rep. of) | 0 | 0 | 0 | 43.833 | 55.966 | - | 27,68 | 1,83 |
| 15 | India | 20.187 | 34.345 | 50.352 | 43.140 | 54.846 | 24,94 | 27,13 | 1,79 |

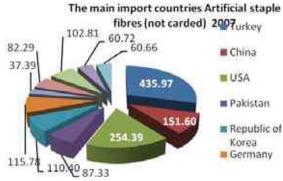
Sources: ITC calculations based on UN COMTRADE statistics

Other than Turkey and China, several other countries were also importing more Artificial staple fibers (not carded) due to domestic economic growth, including Pakistan, South Korea, Vietnam, Indonesia, Chinese Taipei, Israel, Japan, Iran and India.

The table also shows that most countries were experiencing decreasing imports of artificial staple fibers (not carded) in 2009 due to the global financial crisis.

Italy had the largest decrease in imports at 49.18%, from US\$94.21 million in 2008 to US\$47.87 million in 2009 followed by Pakistan whose imports slowed by 31.36% from US\$118.30 million to US\$90.06 million. Imports from France were also reduced by 29.75% from US\$69.74 million to US\$53.75 million.

Turkey, China, USA and Pakistan are potential markets for Artificial staple fibers (non-carded) as they have 53.19% of the total imported Artificial staple fibers (not carded) in the world, as can be seen in the graph below.

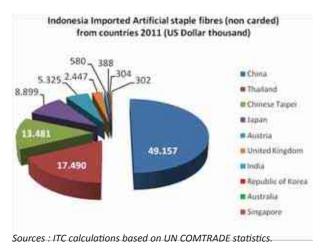


Sources: ITC calculations based on UN COMTRADE statistics

Market Review

Value (US Dollar million) Value (US Dollar million) 72,06 Italy Chinese Taipei 77,70 France 77,88 Indonesia 99,84 Viet Nam 111,11 122,46 Germany 168,21 Republic of Korea 255,34 Pakistan 204,45 USA 479,93 689,96 China Turkey 700 600 500 400 300 200 100 0

Indonesia is importing US\$99.84 million of Artificial staple fibers (not carded) in 2011. The main supplying countries were China with almost half of Indonesia's total imports at 49.24%, followed by Thailand at 17.52%, Chinese Taipei (13.50%), Japan (8.91%) and Austria (5.33%) as can be seen in the graph and table below.



Sources: ITC calculations based on UN COMTRADE statistics.

INDONESIA IMPORT OF ARTIFICIAL STAPLE FIBRES, NOT CARDED FROM WORLD BY COUNTRY OF ORIGIN

| | | Imp | orted valu | Trend | Growth | Shar | | | |
|----|-------------------|--------|------------|--------|--------|--------|------------------|---------------|-------------------|
| No | Countries | 2007 | 2008 | 2009 | 2010 | 2011 | % (07- 11) | % (10- 11) | e % (2011) |
| | All Countries | 60.663 | 37.093 | 53.305 | 61.121 | 99.840 | 16,14 | 63,35 | 100 |
| 1 | China | 1.463 | 5.605 | 11.914 | 18.917 | 49.157 | 128,08 | 159,86 | 49,24 |
| 2 | Thailand | 23 | 9.872 | 8.913 | 5.530 | 17.490 | 255,67 | 216,27 | 17,52 |
| 3 | Chinese Taipei | 8.189 | 6.294 | 21.338 | 17.240 | 13.481 | 22,20 | -21,80 | 13,50 |
| 4 | Japan | 2.551 | 3.804 | 6.392 | 11.571 | 8.899 | 43,50 | -23,09 | 8,91 |
| 5 | Austria | 1.289 | 4.058 | 3.311 | 4.821 | 5.325 | 35,11 | 10,45 | 5,33 |
| 6 | United Kingdom | 223 | 93 | 27 | 769 | 2.447 | 99,44 | 218,21 | 2,45 |
| 7 | India | 0 | 464 | 158 | 550 | 580 | - | 5,45 | 0,58 |
| 8 | Republic of Korea | 0 | 174 | 54 | 77 | 388 | - | 403,90 | 0,39 |
| 9 | Australia | 0 | 399 | 0 | 0 | 304 | - | - | 0,30 |
| 10 | Singapore | 0 | 2 | 119 | 475 | 302 | - | -36,42 | 0,30 |
| 12 | Germany | 320 | 722 | 291 | 361 | 299 | -7,95 | -17,17 | 0,30 |
| 13 | Canada | 0 | 7 | 0 | 0 | 36 | - | - | 0,04 |
| 14 | USA | 796 | 1.029 | 385 | 458 | 22 | -55,01 | -95,20 | 0,02 |
| 15 | Hong Kong | 0 | 828 | 0 | 11 | 15 | - | 36,36 | 0,02 |

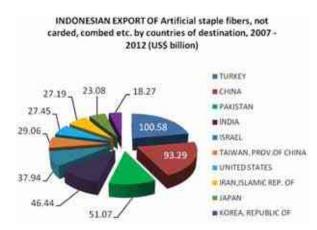
Sources: ITC calculations based on UN COMTRADE statistics.

Exports

Countries in the world exported US\$1.98 billion of artificial staple fibers (non carded) in 2011, far below the imports figure US\$3.06 billion. Indonesia topped the list with US\$528.78 million exporting to over 30 destination countries. China was second, exporting US\$458.55 million in 2011. While the world experienced an average 10.91% of export growth in the 2007-2011 period, Indonesia had a growth of 27.26% while China at 12.97%.

In fact, Indonesia had always recorded the highest export of Artificial staple fibers (not carded) from 2008 to 2011. China exported the most in 2007.

Thailand was the world's third largest exporter with US\$265.21 million followed by Germany (US\$210.09 million) and Chinese Taipei (US\$197.38 million). The Top 15 exporting countries are listed in the table below. The three countries had a growth of 22.03%, 2.91% and 2.31% respectively in the 2007-2011 period.



Sources: ITC calculations based on UN COMTRADE statistics.

Most of Indonesian Artificial staple fiber (not carded) products were exported to Turkey at US\$100.58 million followed by China worth US\$93.29 million, Pakistan (US\$51.07 million),

| No | Countries | | Trend % | | | | |
|-----|----------------|-----------|-----------|-----------|-----------|-----------|----------------|
| 190 | Countries | 2007 | 2008 | 2009 | 2010 | 2011 | (07-11) |
| | All Countries | 1.328.378 | 1.199.835 | 1.180.525 | 1.519.467 | 1.980.927 | 10,91 |
| 1 | Indonesia | 194.075 | 266.411 | 257.413 | 399.922 | 528.788 | 27,26 |
| 2 | China | 281.119 | 197.904 | 214.226 | 251.915 | 458.559 | 12,97 |
| 3 | Thailand | 125.706 | 124.551 | 123.181 | 204.965 | 265.215 | 22,03 |
| 4 | Germany | 187.138 | 176.443 | 154.724 | 186.459 | 210.094 | 2,91 |
| 5 | Chinese Taipei | 199.943 | 144.028 | 177.790 | 185.721 | 197.389 | 2,31 |
| 6 | India | 59.141 | 65.333 | 106.545 | 149.090 | 160.804 | 32,65 |
| 7 | Japan | 35.572 | 39.038 | 53.708 | 53.302 | 60.060 | 14,56 |
| 8 | USA | 26.260 | 28.860 | 26.805 | 25.213 | 27.312 | -0,56 |
| 9 | Finland | 102.373 | 96.547 | 4.813 | 3 | 19.040 | - 74,70 |
| 10 | Belgium | 10.388 | 4.416 | 7.843 | 12.252 | 17.805 | 23,34 |
| 11 | Italy | 7.105 | 6.869 | 5.327 | 5.670 | 8.212 | 0,98 |
| 12 | Singapore | 1.436 | 1.537 | 813 | 3.257 | 6.121 | 44,06 |
| 13 | Hong Kong | 5.109 | 2.994 | 4.928 | 2.962 | 5.065 | -0,28 |
| 14 | Brazil | 27.656 | 13.614 | 14.877 | 19.294 | 4.045 | -29,50 |

Sources: ITC calculations based on UN COMTRADE statistics.

India (US\$46.44 million) and most interestingly to Israel (US\$37.94 million).

The world was experiencing a deficit in the trade of Artificial staple fibers (not carded) in 2011 as the import was US\$3.06 billion while the export was only US\$1.98 billion. Being the world's largest exporter in 2011, however, Indonesia enjoyed a positive balance of US\$528.68 million in the Artificial staple fibers (not carded) much larger than any other countries in the world.

India had the second largest positive trade balance at US\$38.34 million followed by Chinese Taipei (US\$29.18 million), Thailand (US\$9.87 million) and Germany (US\$5.67 million).



World Balance of trade of Artificial Staple Fibers, Not Carded, Combed Etc. by Countries Destination

| No | Countries | | /Imported O thousand) | Balance | Trend % | Growth % (10- | Share |
|-----|----------------|----------------|--------------------------|----------------------|------------|---------------|-------------|
| 110 | Countries | Export 2011 | Import 2011 | 10/11 | (07-11) | 11) | % (2011) |
| | All Countries | 1.980.927 | 3.063.639 | -1.082.712 | 10,91 | 30,37 | 100 |
| 1 | Indonesia | 528.788 | 99.840 | 528.688 | 27,26 | 32,22 | 26,69 |
| 2 | China | 458.559 | 479.926 | - 21.367 | 12,97 | 82,03 | 23,15 |
| 3 | Thailand | 265.215 | 255.342 | 9.873 | 22,03 | 29,40 | 13,39 |
| 4 | Germany | 210.094 | 204.447 | 5.647 | 2,91 | 12,68 | 10,61 |
| 5 | Chinese Taipei | 197.389 | 168.206 | 29.183 | 2,31 | 6,28 | 9,96 |
| 6 | India | 160.804 | 122.458 | 38.346 | 32,65 | 7,86 | 8,12 |
| 7 | Japan | 60.060 | 111.109 | - 51.049 | 14,56 | 12,68 | 3,03 |
| 8 | USA | 27.312 | 99.840 | -72.528 | -0,56 | 8,33 | 1,38 |
| | | | | | | 634566,6 | |
| 9 | Finland | 19.040 | 77.881 | <u>-58.841</u> | -74,70 | 7 | 0,96 |
| 10 | Belgium | 17.805 | 77.703 | <mark>-59.898</mark> | 23,34 | 45,32 | 0,90 |
| 11 | Italy | 8.212 | 72.061 | -63.849 | 0,98 | 44,83 | 0,41 |
| 12 | Singapore | 6.121 | 71.365 | - 65.244 | 44,06 | 87,93 | 0,31 |
| 13 | Hong Kong | 5.065 | 56.571 | - 51.506 | -0,28 | 71,00 | 0,26 |
| 14 | Brazil | 4.045 | 55.966 | - 51.921 | -29,50 | -79,03 | 0,20 |
| 15 | Netherlands | 2.073 | 54.846 | - 52.773 | 7,30 | 58,24 | 0,10 |

Sources: ITC calculations based on UN COMTRADE statistics.

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