

# Wooden Products

Toilet etc household/  
sanitary stock ppr roll/  
sheet ov 36cm



## What Inside

Toilet paper is one of Indonesian flagship products which has already experienced remarkable improvement, both in terms of quality and creativity. With the resources that have entered the standard phase of globalization, Indonesia is ready to compete in the global market. Indonesia has been exporting many of its toilet paper production to overseas markets, such as Asia, the United States as well as countries in Western and Eastern Europe. This is an opportunity for buyers of non-paper stationery products to have a glance on what Indonesia has to offer. Further information on the producers can be acquired simply by reading this month edition of Export News.

trade with  
**remarkable**  
**Indonesia**

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Dear valued readers!

Welcome to the May issue of Export News. As promised, we will continue to update you with the latest information on the best products of Indonesia. In this edition, we feature one of Indonesia's leading products, toilet paper.

The Directorate General of National Export Development, Ministry of Trade, always makes every effort to promote quality export products of Indonesia, through domestic and overseas promotions. We have numerous promotional media to introduce Indonesian products. One of such publications is Export News, an English-language bulletin. In this May 2012 edition, Export News brings you to the information on toilet paper, one of Indonesia's potential products. This bulletin will be distributed to all Indonesian representatives abroad.

Endowed by lush tropical rain forests Indonesia is a leading country producing and exporting wood-based products.

Thank you

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## LIST PRODUCTS

Toilet Paper Roll  
Toilet Paper Tissue

## *hot* issue

Toilet paper has played an important role as a daily product for medical, sanitary and practical purposes. Because of its personal usage, people are demanding high quality and more convenient toilet paper product but at the same time, with more and more consciousness, also pay more attention to environmental sustainability. This is a very normal thing, since the source of production comes from forestry. Unfortunately, Indonesia as one main source of toilet paper products, and also home for some endangered animals, Sumatran Tiger and Orang Utan, faces certain claims from several institutions.

As released on Tissue World Magazine, Greenpeace claims that Indonesia's rainforests and carbon-rich peatlands are being destroyed to make disposable consumer products, including toilet paper and packaging. Greenpeace categorize one of Indonesia's brand production "Paseo" under Asia Pulp and Paper Indonesia as red or to be avoided by consumers. It's a very serious accuse so that the Government of Indonesia and all major trade associations representing the forestry sector, including APKI (The Indonesian Pulp & Paper Association), have together launched a declaration outlining the



eight practical steps required to be undertaken by industry, stakeholders and international trade partners to achieve world-class timber production and trade standards through implementation of the Wood Legality and Verification System (SVLK-Sistem Verifikasi Legalitas Kayu).

The declaration was agreed at a formal ceremony in Jakarta on March 20th during the 2nd High Level Market Dialogue 2012. The introduction of SVLK in Indonesia will ensure that only wood products verified as legal will enter the market. At the event, the forestry associations pledged to fully support the Government of Indonesia's efforts to:

1. Engage with all stakeholders from across the forest industry's multi-layer supply chains to help finalize and implement full SVLK compliance.
2. Encourage an examination of the desirability of adopting a phased approach to SVLK implementation across the industry to ensure a successful transition to full compliance of all companies, thereby mitigating possible production, trade and market disruption.
3. Assist (i) small to medium sized companies, (ii) companies operating in remote areas, and (iii) community based companies to be fully SVLK compliant in line with the Government of Indonesia's sustainable forestry development plan.
4. Work with foreign countries to build and strengthen an efficient mechanism to promote legal wood product and avoiding unnecessary administrative and financial impact on verified

legal Indonesian timber and timber-based producers.

5. Encourage foreign countries to ensure consistency of policy application, encourage national public procurement policies to prioritize verified legal products and to support the introduction of the same high standards across the private sector.
6. Communicate and promote SVLK to global stakeholders consistently as the highest standard to verify legality and as the foundation for the sustainable forest management certification scheme in Indonesia (PHPL/SFM).
7. Encourage a reciprocal responsibility on the part of VPA partners and also the wider international community to ensure only wood products that are verified as legal enter the market.
8. Seek active participation in process to implement the VPA such as the Indonesia/EU Joint Participatory Committee.

SVLK is Indonesia's chain of custody certification program, enacted in 2009. This system ensures that wood products exported from the country are legal and traceable to verified points of origin. SVLK is designed to ensure that the industry will only receive and process timber from legal sources according to the regulations of Indonesia. The regulations cover aspects of licensing, harvesting, transporting and processing for the industry. SVLK is an important step in the effort to achieve full Sustainable Forest Management (SFM) certification with the principle of High Conservation Value Forest (HCVF).

APP as an active member of the forestry associations fully supports the declaration, which is focusing on a multi stakeholder approach to providing assistance to smaller, community-based and geographically remote companies as well as to ensure a sustainable implementation of the SVLK. APP finalised its SVLK audit preparation earlier this year and the full audit was rolled out in April 2012 with a target for finalisation in the first quarter of 2013. One of the purposes is to answer the EU enforcement of FLEGT (Forest Law Enforcement, Government and Trade) Action Plan by March 2013.

The system would help the industry to meet international standard.

(Source :APKI, APP, and Greenpeace)

# PAPER

## and Paper Product



# Paper product

## Market Review

**I**ndonesia has already well-known as a producer and one of main sources of forestry products. On the other side, Indonesian land forest is one of the ten largest in the world and a home for almost 30.000 species of plants and approximately 4.000 variety of trees. It is one of world's source of air lung as well as being the largest tropical rain forest in Asia. Although having an issue of deforestation, Indonesia strikes back with the effort of replanting of 657.117 hectares on 104 areas and some regulations regarding legal actions to certification of conservation forest.

One of the most commercial optimization of forestry products is on pulp and paper industry. Domestically, this industry has played a very strategic role in Indonesian economy, involving capital largely in employment, land, and technology. At least, three main reasons are behind. First, pulp and paper is a basic products valued in dollar. Secondly, the component of import is less than 30%. With domination of export oriented products, it helps pushing up export income to Indonesia.

In the field of paper production, investment is an important starter key. As stated by Indonesian Pulp and Paper Association, it was one of the biggest investments in Indonesia, driven by conducive investment climate, low domestic consumption of paper, and advantages of industrial forest management. The Association also stated that Indonesia had an advantage from production of industrial forest that it was in high quality and had faster production cycle. By managing

industrial forest, harvest can be done in six years after replantation.

Based on Directorate General of Agro and Chemical Industry, Ministry of Industry on an interview posted on kabarbisnis December 2011, Industrial forest in Indonesia reached seven million hectares, spread out in Sumatera, Kalimantan and Papua. Those area are producing legal based wood products because they are not included conservatively protected area.

Currently, there are as much as 14 pulp companies and 79 paper manufacturers in Indonesia classified as medium to large enterprises. The biggest players in the paper industry are integrated factory, with mills producing pulp and paper. With technology improvement, world producer of paper would shift over to sub-tropical countries, from previous domination of Latin America and Scandinavian Countries. And so, in the upcoming years, Indonesia has the potential to be the fourth biggest paper producer in the world.

According to RISI's statistics, Indonesia placed ninth as the world producer of paper in 2010, climbing up one level from the previous year as a result of 9,951 million tons of production in that year compared



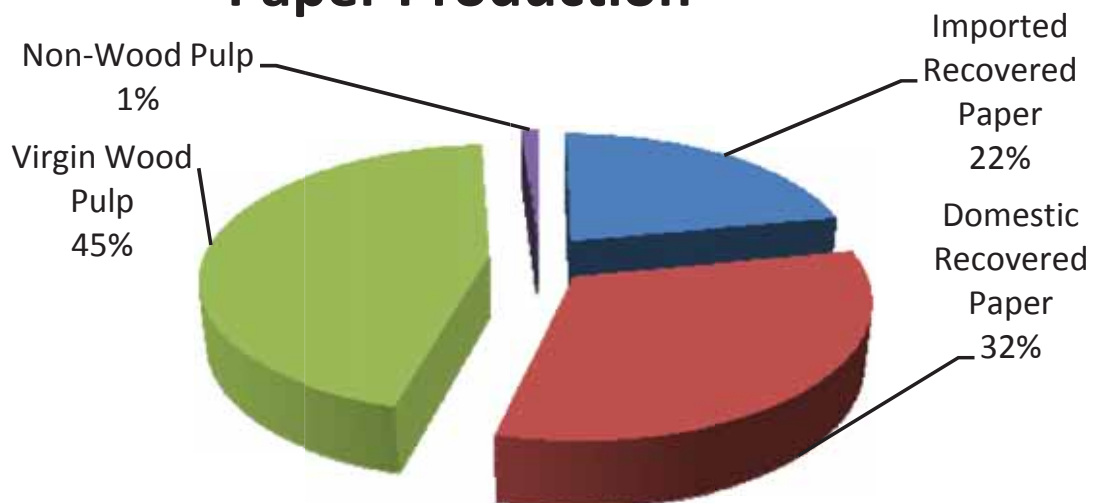


with 9,363 million tons from the previous year (Balai Besar Pulp dan Kertas, Ministry of Industry).

Indonesian Pulp and Paper association stated that the increasing production was as a result of increasing flow of paper supply, back to normal condition, after some cases of logging restriction in the year of 2007-2008. For production of general paper products, the composition is dominated by recovered paper (54%) and 45% virgin wood pulp.

Based on ITC calculation on UN Comtrade statistics, for paper and paper products export under HS Code 48, Indonesia ranked 14th world biggest paper exporter in value, or the second biggest in Asia just after China. The statistics showed that more than 75% of world paper export value was dominated by European Countries, United States of America, China and Indonesia on just top 15 exporters of paper and paper products in the world. This made Indonesia as one of the most important player and source for the products in the world.

### Fiber Consumption for Indonesian Paper Production



Source : Recovered Paper Market, 2010



# Paper Parent Roll

## Paper Parent Roll

**I**ndonesian tissue paper products are identified both branded and non-branded. The most popular branded tissue paper products for export were produced by the biggest company group. It is likely that the market structure of tissue paper has similarities with general paper products and paperboard, it is a tight oligopoly. There are dominant players in the market, both domestic and international.

Here, paper parent roll is classified under HS 4803 (Paper, household/sanitary, rolls of a width > 36 cm). It is a non-branded product. While the branded one is classified under HS 4818 (Toilet

paper, paper tissues, towels, napkins etc). With the potential growth of tissue demand, export market for Indonesian is wide opened. Statistics shows that Indonesia placed at top two biggest exporter of paper parent roll after Italy. Although placed as second greatest, trend of export from Indonesia was among the most rapid in 2011, as much as 29,26% annual growth per year. It was far above the average world export of 3,33% and certainly the highest trend in the top ten list of exporters for the product. As an exporter, Indonesia competed with European Countries and America. In Asia, Indonesia is one of the Asia's two biggest player in



tissue industry together with China. Particularly in parent roll, Indonesia is the most important exporter in Asia.

Almost 11% of world export for this product was supplied from Indonesia, just after Italy with 13,19% share. As reported by Indonesian Central of Statistic Bureau, most of Indonesian products are exported to America, more than 23%. Asia is also an important target for export followed by Australia and New Zealand. Export growth to top ten destination countries

showed a very high trend, mostly up to 40%, except to Australia. Regardless, Indonesia was the biggest exporter in volume in 2011. Couple of years ago, as reported on beritabisnis 2012, Indonesian tissue products, especially APP products, received increasing orders for non-branded paper parent roll, resulted in 30% increasing of their selling.

Having a hard time with environmental issues, Indonesian Pulp and Paper Association has stated their commitment to protect Indonesian forest simultaneously. With industrial forest management and verification of wooden products, the management is capable of producing recycled fibre harvested faster. In an interview posted by Indonesia Finance Today, the Association also clearly stated, that eventhough the parent roll and



tissue products from Indonesian contained tropical woods, like acacia, the composite is only 10-20% and those are

legal because they were produced in an industrial forest, not a conservation area. More specific reason is that other countries in Asia, South America and Africa also on the track to develop industrial forest are also developing similar composition of fibre.

There is no Certification of tissue products that approved to be one international standard, so there are still many individual certifications. But one thing for sure, environmental certification should be helping the tissue industry rather than pushing it back

No	Exporters	Exported Value in US\$000					Statistics		
		2007	2008	2009	2010	2011	Change 10-11 (%)	Trend 07-11 (%)	Share 2011 (%)
	World	2690082	2888934	2541101	2919784	3152415	7.97	3.33	100
1	Italy	318087	329308	300360	374375	415705	11.04	6.86	13.19
2	Indonesia	123351	182842	206101	303119	344398	13.62	29.16	10.92
3	Sweden	242256	283055	255037	286366	297867	4.02	4.34	9.45
4	Germany	300394	247395	205795	206746	272974	32.03	-3.64	8.66
5	Canada	183972	197828	169815	210761	220188	4.47	4.32	6.98
6	USA	196201	191325	170808	215465	176532	-18.07	-0.92	5.60
7	France	186091	219148	170045	150210	175935	17.13	-4.78	5.58
8	Spain	119267	159532	110638	67072	138213	106.07	-5.56	4.38
9	Turkey	51314	82791	62695	72999	116862	60.09	16.42	3.71
10	Mexico	55113	91061	57531	58502	103587	77.07	8.54	3.29
	Other Countries	914036	904649	832276	974169	890154	-8.62	0.21	28.24

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Source : APKI and indonesian-embassy.ir

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