



remarkable Indonesia

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Published by:

DIRECTORATE GENERAL OF NATIONAL EXPORT DEVELOPMENT

Ministry of Trade Republic of Indonesia

Ditjen PEN/MJL/46/VII/2013

FROM EDITOR'S DESK

Dear Valued Readers,

The first half of 2013 has just passed by and we hope that you have accomplished most of your plans and targets so far. We are confident that you are also ready for the rest of the year to seek out higher achievement.

The July edition of Export News brings you the information on Indonesian pepper, one of the spices that enticed Western explorers and colonizers to visit this beautiful archipelago to get the precious commodities.

Indonesia was the third largest exporter of peppers in 2012 with a shipment worth US\$435.25 million, increasing by 94.83% from US\$223.40 million worth of peppers it exported in 2011. Quite interestingly, Indonesia top destinations for pepper include Vietnam and India, the world's largest pepper producers.

With some 40 varieties of peppers, 6 of them are the most cultivated varities, Indonesia has the potentials to catch up the shipment made by India and Vietnam in 2012 of US\$676.57 million and US\$609.38 million respectively.

Lampong Black Pepper and Muntok White Pepper are two of the most popular peppers produced in Indonesia.

We do expect that this July edition of Export News could provide you with the information you need to buy black and white peppers from Indonesia. You are encouraged to directly contact the exporters we have listed in this edition.

Thank You

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hot issue



For Indonesia, spices is a historical reflection on rich natural resources with more than 17,000 islands leading the archipelago to be known as Spices Islands in the past. Spices were the reasons Westernerns were racing to get the precious commodities, such as Portugues explorer Vasco da Gama reaching India and Maluku, the Dutch landing at Maluku while Spaniard explorer Magellan sought the route to the East through the Pacific Ocean before landing on Luzon Island in the Philippines.

One of the most precious spices is black pepper, or Piper nigrum, a flowering vine in the family

Hot Issue

Piperaceae, cultivated for its fruit, which is usually dried and used as a spice and seasoning. The fruit, known as a peppercorn when dried, is approximately 5 millimetres in diameter, dark red when fully mature, and contains a single seed. Peppercorns, and the ground pepper derived from them, may be described simply as pepper, or more precisely as black pepper (cooked and dried unripe fruit), green pepper (dried unripe fruit) and white pepper (unripe fruit seeds).

Pepper is native to South Asia and Southeast Asia and has been known to Indian cooking since at least 2 BCE. Peppercorns were a much-prized trade good, often referred to as "black gold" and used as a form of commodity money. The legacy of this trade remains in some Western legal systems which recognize the term "peppercorn rent" as a form of a token payment made for something that is in fact being given.

Pepper is used not only as spice but also as raw materials for medicines, cosmetics and aromatics. The use of peppers, especially for food, has increased on the back of food safety issue with the use of chemical ingredients. On the other hand, there are also higher demands for the safety of spices for food especially in developed countries as well as trends among customers to go back to nature.



SPICY INDONESIAN PEPPERS

Indonesia is one of the world's largest pepper producers with most of the exports is in the form of fruits and a small number in form of ground pepper and oil forms. Based on data from the Agriculture Ministry, Indonesian pepper production reached 88,160 tons, increasing by 1.23% from 2011's figure of 87,089 tons.

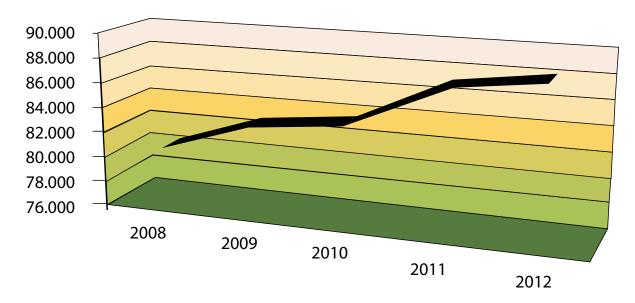
Major black pepper producing region is Lampung

province, whose Laampong Black Pepper has been widely known since the 16th century. Bangka Belitung Islands province, on the other hand, is the major producer of Muntok White Pepper.

Other pepper producing provines include Aceh, Jambi, West Kalimantan, East Kalimantan, West Nusa Tenggara, South Sulawesi, Southeast Sulawesi, South Sumatra, North Sumatra, and Yogyakarta.

Indonesian Pepper Production

Unit: Tons



Source: Agriculture Ministry

Market **Review**

Indonesia has a wide variety of pepper with some 40 types of pepper. There are six varieties that are the most commonly cultivated varieties consisting of Bulok Belantung, Jambi, Kerinci, Lampung Daun Lebar (LDL) or Lampung Wide Leaves, Bangka (Muntok) and Lampung Daun Kecil (LDK) or Lampung Small Leaves.

Another advantage owned by Indonesia is the seven disease-resistant varieties of Petaling 1, Petaling 2, Natar 1, Natar 2, Choenuk, LDK, dan Bengkayang. The types of exported peper are organized in Harmonized System (HS) 0904 on pepper, peppers and capsicum. The category is further divided into several sub-categories as shown in the table below:

NO.	HS	COMMODITY				
1	0904111000	White pepper, neither crushed nor ground				
2	0904112000	Black pepper, neither crushed nor ground				
3	0904209000	Oth fruits of the genus capsicum/ pimenta, dried or crushed or ground				
4	0904119000	Other pepper, neither crushed nor ground				
5	0904121000	White pepper, crushed or ground				
6	0904122000	Black pepper, crushed or ground				
7	0904201000	Chillies, dried				
8	0904129000	Other pepper, crushed or ground				
9	0904202000	Chillies, crushed or ground				

EXPORTS

The export of all commodities grouped in the HS 0904 category from Indonesia showed an average growth trend of 23.93% in the 2008-2012 period. Export in 2012 reached US\$435.25 million, increasing

by 94.83% from US\$223.40 million in 2011. In the first five months of 2013, the export was US\$86.42 million or decreasing by 6.27% from the same period in 2012 of US\$92.19 million.



Indonesian export is dominated by black pepper, neither crushed nor ground, presenting a market share of 68.49% of 2012's total market, with an export of US\$298.12 million. The export was higher than 2011's figure of US\$110.13 million. In the period of January-May in 2013, the export was US\$34.24 million, a decrease of 34.18% from US\$52.02 million recorded in the same period in 2012.

The second largest sub-category of white pepper, neither crushed nor ground, enjoyed a healthy growth in the first five months of 2013 growing by 30.35% from US\$31.66 million in 2012 to US\$41.27 million. The full year export of white pepper, neither crushed nor ground in 2012 was US\$114.43 million, consisting 26.29% of the total export in the HS 0904 category.

Globally, the export of commodities grouped in HS 0904 showed an annual healthy growth of 15.70% in the 2008-2012 period. The world exported US\$3.42 billion worth of peppers commodities in 2012, an 4.24% increase from the export in 2011 of US\$3.28 billion.

Exports of white and black peppers also showed its domination globally with a total market share of 50.66%.

India was the largest exporter in 2012 by sending US\$676.57 million worth of peppers to the world, decreasing slightly by 0.05% from its export in 2011 at US\$676.88 million. The second largest exporter, Vietnam, also suffered from decreasing exports by 16.97% from US\$733.91 million in 2012 to US\$609.38 million. With such significant export reduction, Vietnam has to relegate its world's top producer status in 2011 to India which has dominated world export in the previous years.

Indonesia was third in 2012 although it has to do more work to provide stiffer competition to peppers exported by India and Vietnam.

In the fourth place, China also suffered from decreasing export by 10.84% from US\$317.72 million in 2011 to US\$283.28 million in the following year. Brazil was in the fifth place with an export of US\$199.47 million, a slight increase of 0.28% from

US\$198.92 million it exported in 2011.

Spain was the sixth largest exporter with US\$140.64 million followed by the Netherlands (US\$136.34 million), Germany (US\$118.30) and Peru (US\$112.49 million) in the ninth place. Malaysia was the only country in the Top 10 with an export of less than US\$100 million having exported US\$85.86 million worth of peppers. Malaysia suffered a 15.19% decrease from its export in 2011 of US\$101.24 million.

Indonesia's top export destination for peppers in 2012 were the United States, top pepper exporters Vietnam and India, Singapore and the Netherlands. The export to the United States was US\$156.76 million for a market share of 36.02% of Indonesia's total pepper export in 2012. In the first five months of 2013, Indonesia suffered a decrease of 42.52% in the first five months of 2013 from US\$36.02 million in 2012 to US\$20.70 million.

The export to major pepper exporter Vietnam increased significantly by 111.26% from US\$7.68 million in the first five months of 2012 to US\$16.23 million in the same period the following year. The full year export in 2012 was US\$105.30 million for a market share of 24.19%

India, the world's largest pepper producer, imported US\$41.03 million from Indonesia in 2012 with a market share of 9.43%. The export in the first five months of 2013 was US\$10.59 million, decreasing by 27.42% from export in the same period in 2012 of US\$14.60 million.

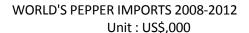
Export to Singapore reached US\$23.82 million in 2012 for a market share of 5.47. Export in the period of January-May 2013 was US\$6.30 million, increasing by 9.76% from US\$5.74 million in the same period in 2012.

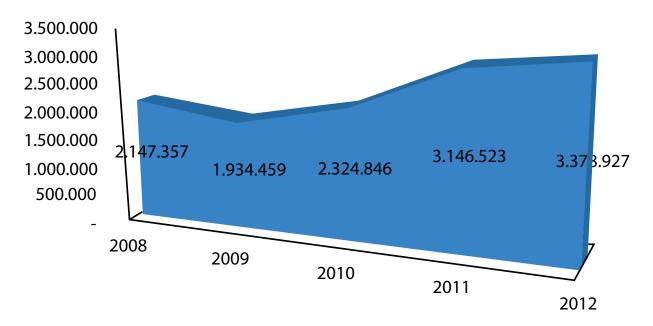
Indonesia sent US\$16.74 million worth of peppers to the Netherlands in 2012, for a market share of 3.85%. Shipment to the Netherlands in the first five months of 2013 was US\$5.85 million, slightly decreasing by 0.17% from the figure in the same period in 2012 of US\$5.86 million.



Global imports also showed an increasing trend with an annual average growth of 14.95% in the 2008-2012 period. The world imported US\$3.37 billion in 2012, growing by 7.39% from US\$3.14 billion. The

imports of black and white peppers also dominated the world's imports with a market share of 48.03% worth US\$1.62 billion. The imports in 2012 increased by 12.66% from 2011's figure of US\$1.44 billion.





Source: International Trade Center

Market **Review**

The world's major importers were the United States and Germany which imported US\$754.74 million and US\$255.4 million respectively in 2012. With a market share of 22.34% of the world's total import, the United States' import in 2012 grew by 10.18% from its import in 2011 of US\$680.71 million.

Germany had a market share of 7.56% from the world's import in 2012, which import was increasing by 16.11% from US\$219.96 million in 2011.

In the third place was Vietnam which imported a significant amount of peppers despite its position as a top pepper exporter. Vietnam imported US\$189.6 million or a market share of 5.61% in 2012. Vietnam experienced a tremendous surge in its imports of 229.84% as it only imported US\$57.49 million.

On the other hand, Indonesia was only listed in the 27th place of world's pepper importer with an import of US\$29.41 million, an increase of 7.22% from Indonesian import of US\$27.45 million in 2011. Spain imported 1.22% less worth of pepper from US\$143.73million to US\$141.98 percent and Japan bought 5.07% more pepper from US\$129.27 million in 2011 to US\$135.82 million in the following year to complete the Top 5 of world's pepper importers.

In the sixth place was the Netherlands which imported US\$128.95 million worth of peppers in 2012, followed by another major pepper producer Malaysia (US\$126.83 million), the United Kingdom (US\$117.02 million), world's largest pepper exporter India (US\$111.59 million) and Singapore (US\$86.18 million).

WORLD'S TOP 10 PEPPER IMPORTERS

Importers	2008	2009	2010	2011	2012
World	2.147.357	1.934.459	2.324.846	3.146.523	3.378.927
United States of America	463.210	405.383	484.317	680.708	754.740
Germany	183.464	151.261	184.022	219.965	255.409
Viet Nam	29.490	24.575	69.264	57.499	189.655
Spain	97.921	92.729	89.816	143.735	141.981
Japan	90.589	87.382	98.783	129.273	135.828
Netherlands	72.224	67.084	82.770	130.414	128.958
Malaysia	92.775	111.029	147.479	159.110	126.839
United Kingdom	66.757	57.465	73.424	102.171	117.021
India	49.537	47.124	49.404	78.840	111.593
Singapore	55.333	41.653	50.125	77.691	86.188





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sitsb@pop.rad.net.id

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Wisma Eka Jaya Ruko No. 3, Jl. Mangga Dua Raya Blok N, Jakarta 10730, Indonesia

Phone : (62-21) 6257168, 6257139

Fax : (62-21) 6257140 Email : jakarta@putra-bali.com Website : www.putra-bali.com

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Website: www.rasdico.com

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(62-721) 351092-94 : (62-721) 351089 Email: info@nekabogaperisa.com

nbp-lmp@indo.net.id Website: www.nekabogaperisa.com

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