

MINISTRY OF TRADE

EXPORT News INDONESIA

WHAT'S INSIDE

Ditjen PEN/MJL/50/VII/2019

Indonesia is one of the exporters of world charcoal products with a market share of 22.32% in 2018. The export value makes Indonesia the first exporter of charcoal products to the World.

ROAL

# editor's desk

#### Dear valuable readers,

Indonesia is one of the main coconut producing countries in the world. The area of coconut plantations in 2018 reached 3.86 million ha, with total production estimated at 14.5 billion coconuts, most of which (98%) were smallholder plantations. Coconut has important values and roles both in terms of economic and socio-cultural aspects.

Utilization of coconut fruit is generally only the fruit meat to be used as copra, oil and coconut milk for household needs, while other by products such as coconut shell have not been used so much. Shell weight reaches 12% of coconut weight. Thus, if the average production of coconuts per year is 5.6 million tons, then it means that there are around 672 thousand tons of shell produced. The potential for shell production that is so large has not been fully utilized for productive activities that can increase its added value.

One product made from coconut shell is the manufacture of shell charcoal which in the next process can be processed into activated charcoal. So shell charcoal is a raw material for the activated charcoal industry. Not many people have made this shell charcoal, even though the potential for raw materials, usage and market potential is quite large.



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Advisor : **Arlinda** 

Editor in Chief : Iriana Trimurty Ryacudu

Managing Director : RA. Marlena

Editor : **Sugiarti** 

Writer : Arif Permana Yudha

Design : **Aditya Irawan**  Editorial Addresses :

#### DIRECTORATE GENERAL OF NATIONAL EXPORT DEVELOPMENT Ministry of Trade of The Republic of Indonesia

Jl. Ml. Ridwan Rais No. 5, Jakarta 10110 INDONESIA

Telp : +62 21 3858171

Fax : +62 21 23528652

Email : csc@kemendag.go.id

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



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# HOT ISSUE

Activated charcoal has been known for a long time as a binder and antidote in the body. This substance is usually produced from old coconut shells or wood powder. Charcoal is activated to enlarge the surface area and increase its binding capacity. The activation process is carried out by soaking the charcoal in certain chemicals. Furthermore, activated charcoal is processed and packaged in pill or powder form. One of the active charcoal products that can be found in pharmacies or stores is Norit. This product is usually used as a digestive medicine.

Activated charcoal, besides being able to bind and remove toxins in the body also has other benefits. The benefits of activated charcoal can be obtained, which is able to whiten teeth, relieve flatulence and colds, bargain poisons, repel body odor, treat acne, overcome insect bites, cleanse the digestive tract, and prevent premature aging.

#### Coconut Charcoal Reinforcement of Foreign Exchange

The 100% business sector based on Indonesia's natural resource wealth, namely coconut, has broad benefits and high leverage. Ranging from coconut meat, water, coir, to coconut shells can make a lot of money if it is clever to manage it. Even coconut stems, leaves, sticks, and coconut roots can still be used for human needs.

Coconut shells are used as briquettes with very high selling value. Coconut charcoal is a coconut shell that is made as powder, then isadonized with a mixture of flour, after that it is molded like boxes the size of a fist, then dried using an oven so that it is ready to use as an environmentally friendly fuel.

#### The Indonesian Charcoal Briquette Industry is Endangered

Rupiah exchange rate throughout 2018 has depreciated by more than 10% against the US dollar. This of course disrupts the state budget, business planning, and even the execution of the business itself. However, not all business sectors collapsed due to the depreciation of the dollar against the rupiah.

In 2016, Indonesia produced 14.5 billion small items. The amount if converted to 457.41 thousand tons of charcoal (row charcoal material). Of this amount, 273.11 thousand tons (40.97%) of charcoal are exported in raw, low value products. Of course, as much as 40.95 thousand tons of charcoal is absorbed by domestic consumption, 135.55 thousand tons of charcoal is absorbed by the domestic active carbon industry, 217 thousand tons are absorbed by the domestic high value products.

The value above shows that there is a supply deficit of 209.20 thousand tons for domestic needs. The total raw materials of chorcoal exported in 2016 reached 273.11 thousand tons, while those exported were only 22.63 thousand tons of activated carbon.

In contrast to the Philippines, the land area is no more than half the land in Indonesia with less production from Indonesia, but capable of producing activated carbon almost three times that of Indonesia. They exported 25.36 thousand tons of charcoal raw material compared to 61.78 thousand tons of activated carbon which had been added value.

Whereas India has the same land area as Indonesia, but is able to produce twice as many coconut grains as Indonesia. India exported only 16.75 thousand tons of charcoal raw material, but was able to export activated carbon to 71.67 activated carbon.

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If the new coconut charcoal material is not regulated by the government, then based on the Asian Pacific and Coconut Community (APCC) data on the trend of coconut charcoal exports during 2011-2016 it is projected that in 2032 the entire domestic charcoal industry will be threatened with extinction due to run out of raw materials. A touch of regulation from the government is needed so that the export orientation is focused on added value, absorbing labor while raising the dignity of the nation in the eyes of the international community.

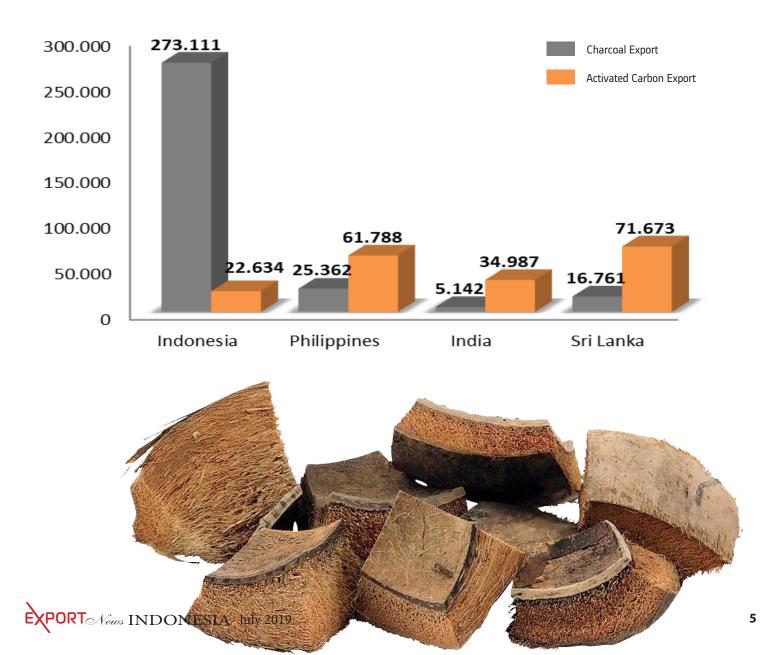
Currently coconut shell charcoal briquettes are well-known in Saudi Arabia, Germany, France, the Netherlands, America, Australia, China and other developed countries. Charcoal briquettes are commonly used for suction shisha fuel, for barbecue grilling, and a small portion for burning satay, fish, meat and others. While the activated carbon of coconut shell charcoal, commonly used for cleaning water through distillation, gold refining, aquarium cleaners, neutralizing hospital waste, norit mixers and toothpaste.

The concept of developing coconut shell charcoal briquette products to boost export foreign exchange earnings must be immediately agreed, because the receipt of this charcoal briquette business is in the form of US dollars. In addition, this business development can create a new young entrepreneur in the field of coconut shell charcoal and activated carbon briquettes. Especially for the development of MSME business in the field of coconut shell briquettes.

This charcoal briquette business can also be one solution to maximizing employment. At least 1 million workers can be absorbed with the coconut business structure as it is, but if you get a touch of regulation, that potential can be increased.

Even this business opportunity can be a means of embodying the mental revolution of the President of the Republic of Indonesia, namely a shift from raw material export mentality to value added products export mentality.

In short, when Bank Indonesia had to lose foreign exchange reserves of more than US \$ 14 billion in 2018, coconut shell charcoal briquettes were able to bring in US dollars or foreign exchange from exports. Therefore, this business must be protected and regulated so that the direction of future development is not only consumed by the times, but also can become a superior export product.



# MARKET REVIEW

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In tax and excise regulations, wood is included in Chapter 44, Section IX which includes Wood and articles of wood; wood charcoal; cork and articles of cork; manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork. The following is a table of charcoal wood products that go into will be reviewed:

#### HS-Code Wood Charcoal and Its Description

HS-Code	Description
4402	Wood charcoal, incl. shell or nut charcoal, whether or not agglomerated (excl. wood charcoal used as a medicament, charcoal mixed with incense, activated charcoal and charcoal in the form of crayons)
44029000	Wood charcoal, incl. shell or nut charcoal, whether or not agglomerated (excl. bamboo charcoal, wood charcoal used as a medicament, charcoal mixed with incense, activated charcoal and charcoal in the form of crayons)
44021000	Bamboo charcoal, incl. shell or nut charcoal, wheth- er or not agglomerated (excl. used as a medicament, mixed with incense, activated bamboo charcoal and in the form of crayons)

Wood charcoal referred to in the classification of wood is obtained through the process of carbonation of wood with air, namely in HS 4402. HS Code 4402 includes charcoal made of wood, coconut, grains, and bamboo which has undergone agglomerated or not. Formally, it states that HS Code 4402 includes wood charcoal in the form of:

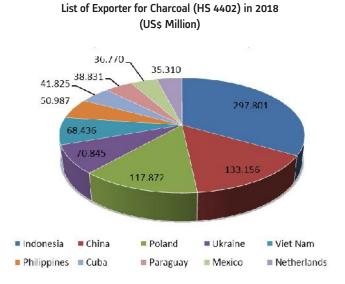
1. Block

- 2. Stems
- 3. Granules
- 4. Powder
- 5. Briquettes
- 6. Tablet
- 7. Ball

Indonesia is one of the exporters of world charcoal products with a market share of 22.32% in 2018. Indonesia's charcoal (HS 4402) products during this year (2014-2018) recorded significant growth with a growth value of 16.7% / year . Where in 2015 the export value reached US  $\pm$  156.52 million and in 2018 it reached US  $\pm$  297.80 million. The export value makes Indonesia the first exporter of charcoal products to the World;

Another major exporter in the world for charcoal products is China, which in 2018 recorded an export value of US \$ 133.15 million or representing 9.98% of the world market share, after which Poland with an export value of US \$ 117.87 million or representing 8.83% market share in 2018.

The export value of World charcoal products also recorded positive growth with an average value of 8.83% / year, which in 2014 reached an export value of US \$ 920.31 million and continued to grow to reach US \$ 1.33 Billion in 2018.

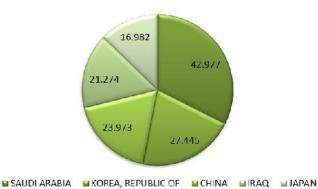


#### Indonesia Export (HS 4402) to World in 2018 (US\$ Million)



Indonesian charcoal products have been successfully exported throughout the World, the top 5 countries with the largest export value in 2019, namely (1) Saudi Arabia with a value of US  $\pm$  42.98 million, (2) South Korea with a value of US  $\pm$  27.44 million, (3) China with a value of US  $\pm$  23.97 million, (4) Iraq with a value of US  $\pm$  21.27 million, and (5) Japan with a value of US  $\pm$  16.98 million.

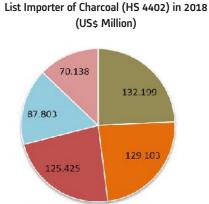
#### Indonesia Export of Charcoal (HS 4402) o World in 2018 (US\$ Million)



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### **MARKET REVIEW**

While the 5 World countries have the highest demand for charcoal products in 2018, namely Japan with a value of US \$ 132.19 million, Germany with a value of US \$ 129.10 million, South Korea with a value of US \$ 125.42 million, China with a value of US \$ 87.80 million, and the United States with a value of US \$ 70.14 million.

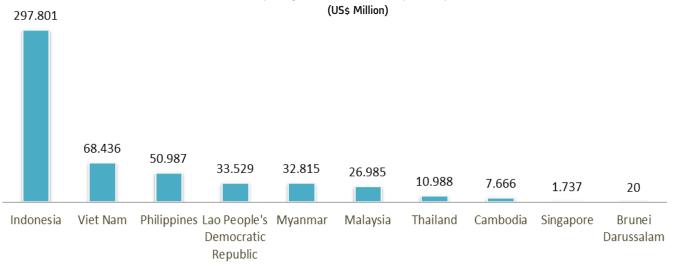


🔳 Japan 📕 Germany 📕 Korea, Republic of 🔳 China 📕 United States of America

HS Code 4402 or wood charcoal has very many variations in terms of form. However, there are only two main sub-products of this code, namely those from wood and those from bamboo. In this case, the selection of forms for the production of wood charcoal is not too complicated. In general, consumers use wood charcoal for baking, because it is one of the activities that are very popular with household members. This makes Indonesia the largest exporter of wood charcoal from Southeast Asia. To export wood charcoal to the World does not have a high complexity, which is noteworthy that the labels that are required to be installed prove the language of the source of the wood used is not from rare wood.

Indonesian competitors for Charcoal products from other ASEAN countries in 2018 to the World are Viet Nam with an export value of US \$ 68.44 Million, followed by the Philippines US \$ 50.98 Million, Laos US \$ 33.53 Million and Myanmar US \$ 32 , 82 million.



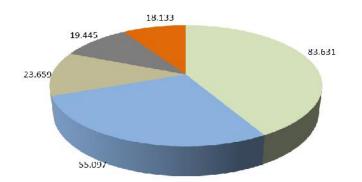


## List of ASEAN Exporting Countries of Charcoal (HS 4402) to World in 2018

The performance of trade in charcoal products from the ASEAN Region to the World shows positive growth with an average increase of 17.55% / year, where in 2014 the export value reached US \$ 252.62 million and continued to grow to reach US \$ 530.96 million in in 2018. In 2018 alone, the export value represented 39.79% of the World market share;

Whereas the export of Indonesian charcoal products if based on the province in 2018 is East Java with an export value of US \$ 83.63 Million, followed by Central Java with an export value of US \$ 55.09 Million, West Java with an export value of US \$ 23.66 Million. DKI Jakarta with export value of US \$ 19.44 Million and West Kalimantan with export value of US \$ 18.13 Million;

Indonesia Export of Charcoal (HS 4402) to World in 2018 by Province (US\$ Million)



EAST IAVA CENTRALIAVA WEST JAVA DKLJAKARTA WEST KALIMANTAN



### LIST OF EXPORTERS

#### 1. CV. PRASIDA EKATAMA

Jl. Tikala Ares I No. 19, Wenang – Manado, Sulawesi Utara

Tel. : (62-431) 852424, 858616 Fax. : (62-431) 874324

Email : kennyridwan2000@yahoo.com

#### 2. CV. BERKAH GARAM ABADI

Jl. Pramuka No. 09 RT. 01/RW. 01, Desa Agungmulyo Juwana – Pati Jawa Tengah

Tel. : (62-295) 4746239 Fax. : (62-295) 4746239

Email : sales@cv.bga.co.id; ayu.ummahat@yahoo.com Web. : http://cv-bga.co.id/

#### 3. PT. DEWANGGA ENERGI INTERNASIONAL

Epicentrum Walk Office Suite 529A, Jl. HR. Rasuna Said Jakarta Selatan, DKI Jakarta

Tel. : (62-21) 37530629 Fax. : (62-21) 37530629

Email : aly.rasyid@gmail.com; aly.rasyid@dewanggaenergi. com Web. : www.dewanggaenergi.com 4. CV. GLOBAL INDON RESOURCES Jl. Sudirman 176, Duri, Riau

Tel : (62-761) 53634

Email : yassin.achmad@gmail.com

#### 5. CV. MIAGO INTERNATIONAL

Jl. Bibis, Kasihan, Bantul, DI. Yogyakarta

Tel : (62-274) 385742

Email : miagopower@gmail.com Web. : http://charcoalbiomass.com/

#### 6. PT. MAPALUS MAKAWANUA CHARCOAL INDUSTRY

Jl. Raya Manado – Bitung Km 35 Tanjung Merah, Bitung 9547, Sulawesi Utara

Tel : (62 438) 38874, 38875 Fax : (62 438) 38872

Email : general@haycarbino.com web : haycarb.com



### COMMERCIAL ATTACHES

#### Australia (Canberra)

8, Darwin Avenue, Yarralumia Canberra, ACT 2600 : (+61-2) 62508600, 62508654 Phone

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	
Phone	: (+32-2) 7790915
Fax	: (+32-2) 7728190
Website	: www.embassyofindonesia.eu

#### Canada (Ottawa)

55 Parkda	le Avenue, Ottawa Ontario, K1Y 1E5
Phone	: (+1-613) 7241100 ext.307
Fax	: (+1-613) 7241105, 7244959
Email	: commerce@indonesia-ottawa.org
Website	: http:/trade.indonesia-ottawa.org

#### China (Beijing)

Indonesian Embassy Dongzhimenwai Dajie		
No. 4 Chaoyang District		
: (+00861) 65324748, 3811340842		
: (+00861) 65325368		
: atdag-chn@kemendag.go.id		

#### Egypt (Cairo)

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

#### France (Paris)

47-49, rueCortambert 75116 Paris		
Indonesian Mission to the European Union Boulevard		
Phone	: (+33-1) 45030760, 45044872 ext.418	
Fax	: (+33-1) 45045032	
Email	: atdag-fra@kemendag.go.id	

#### Germany (Berlin)

c/o Embassy of the Republic of Indonesia	
LehrterStra	be 16-1710557 Berlin
Phone	: (+49-30) 47807142
Fax	: (+49-30) 44737142, 47807290
Email	: trade@indonesian-embassy.de
Website	: www.indonesian-embassy.de

#### India (New Delhi)

Embassy of the Republic of Indonesia 50-A		
Kautilya Marg Chanakyapuri 110021		
Phone	: (+91-11) 26114100	
Fax	: (+91-11) 26885460	
Email	: atdag-newdelhi@yahoo.com	

#### Italy (Rome)

F

ndonesian Embassy Via Campania 53-55		
Rome 00187		
Phone	: (+39-06) 42009101	
ax	: (+39-06) 4880280	
Email	: indorom@indonesianembassy.it	

#### Japan (Tokyo)

Indonesian Embassy 5-2-9, Higashi Gotanda, Shinagawa-ku Tokyo 141-0002 Phone : (+81-3) 34414201 ext.321 : (+81-3) 34471697 Fax : trade@kbritokyo.jp Email : www.shoumubu.kbri.jp Website

#### Malaysia (Kuala Lumpur)

Indonesian Embassy No.233 Jalan Tun Razak 50400 Kuala Lumpur Phone : (+603) 21164000, 21164067 : (+603) 21167908, 21448407 Fax Email : atdag.kbrikl@gmail.com : www.kbrikualalumpur.org Website

#### Netherlands (Den Haag)

Tobias Ass	erlaan 82517 KC Den Haag
Phone	: (+86-10) 65325486/87/88
	ext. 3014, 3017, 3030
Fax	: (+86-10) 65325368, 65325783
Email	: atdag@indonesia.nl

#### Philippines (Manila)

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

#### Russia Federation (Moscow)

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

#### Saudi Arabia (Ryadh)

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

#### Singapore

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

#### South Korea (Seoul)

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

#### Spain (Madrid)

Indonesian Embassy 65, Calle de Agastia 28043 Madrid Phone : (+34) 914130294 Ext. 223 Fax : (+34) 91413899 : atdag-esp@kemendag.go.id Email

#### Switzerland (Geneva)

Indonesia Permanent Mission - Rue de Saint Jean 30 Geneva 1203 : (+41-22) 9401736 Phone : (+41-22) 9401734 Fax Website : www.mission-indonesia.org

#### Thailand (Bangkok)

Indonesian Embassy, 600-602 Petchburi Road, Rajthevi, Phayathai Bangkok - Thailand 10400 Phone : (+66-2) 2523135/40 Ext. 123 Fax : (+66-2) 2551264, 2551267 Email : atdag.bkk@gmail.com

#### United Kingdom (London)

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

#### United States of America (Washington DC)

2020 Massachusetts Avenue, NW, Washington DC 20036		
Phone	: (+1-202) 7755200/5352	
Fax	: (+1-202) 7755354	
Email	: commercial-attacheembassyofindonesia.org	
Website	: www.embassyofindonesia.org	

#### Vietnam (Hanoi)

50 Ngo	o Quyen street, Hanoi - Vietnam
Phone	: (+84-24) 38253363, 38253324
ax	: (+84-24) 38259274
Mobile	: (+84-24) 904517636
Email	: atdag.hanoj@kemlu.go.id

#### KDEI (Taipei)

Indonesian Economic and Trade Office to Taipei Twinhead Bld 6F No.550 RuiGoang Rd, Eihu District Taipei 114, Taiwan ROC : (+886-2) 87526170 Ext.637, 640 Phone : (+886-2) 87523706 Fax Email : kakdei-twn@kemendag.go.id Website : www.kdei-taipei.org

#### Commercial Consul (Hongkong)

127-129 Leighton Road, 6-8 Keswick Street, Causeway Bay Hongkong, P.R.Tiongkok Pł 21

Phone	: (+852) 36510201, 2890442
Fax	: (+852) 28950139
Email	: kondag-hkg@kemendag.go.

il	: kondag-hkg@kemendag.go.id;
	info@cgrihk.com



### **INDONESIAN TRADE PROMOTION CENTER (ITPC)**

#### BARCELONA

Calle Aribau 250, Bj.08006 Spain		
Phone	: (+34) 934144662	
Fax	: (+34) 934146188	
Email	: info@itpc-barcelona.es	
Website	: www.itpc-barcelona.es	

#### BUDAPEST

No. 101, 1<sup>st</sup> floor, ECE Building, 12 Bajcsy Zsilinszky Street Budapest, 1051 Hungary Phone : (+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 601-010 Phone : (+82-51) 4411708 Fax : (+82-51) 4411629 Email : itpc-kor∞kemendag.go.id Website : www.itpc-busan.com

#### **CHENNAI**

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

#### **CHICAGO**

670 N Clark Street, 1 <sup>st</sup> floor Chicago, IL 60654		
Phone	: (+312) 6402463	
Fax	: (+312) 6402648	
Email	: itpc-chicago@itpcchicago.com	
Website	: www.itpcchicago.com	

#### DUBAI

Al Masraf Tower 4<sup>th</sup> floor Office No.403 Baniyas Road Deira P.O.Box 41664 United Arab Emirates

Phone	: (+971-4) 2278544
Fax	: (+971-4) 2278545
Email	: itpcdxb@emirates.net.ae
Website	: www.itpc-dubai.com

#### HAMBURG

GlockengieBerwall 17, 20095 Hamburg	
Phone	: (+49-40) 33313280/81/83
Fax	: (+49-40) 33313282
Email	: itpc@itpchamburg.de
Website	: www.itpchamburg.de

#### JEDDAH

Consulate General of the Republic of Indonesia Jeddah Al-Mualifin Street, Al-Rehab District/5 P.O.Box 1021411 Phone : (+966-2) 6711271 Fax : (+966-2) 6730205

Email	: itpc.jed09@gmail.com

#### JOHANNESBURG

7<sup>th</sup> floor The Forum, 2 Maude Street, Sandown,

Sanuton 2	2146 South Africa	
Phone	: (+27-11) 8846240	
Fax	: (+27-11) 8846242	
Email	: itpc@itpcjohannesburg.com;	
	info@itpcjohannesburg.com	
Website	: www.itpcjohannesburg.com	

#### LAGOS

5B, Anifov	voshe Street, Off Odeola Odeku Street
Victoria Is	land, Nigeria
Phone	: (+234-1) 4619865
Fax	: (+234-1) 4619862
Email	: itpclagos@yahoo.co.id;
	info@itpclgs.com
Wehsite	· www.itnclas.com

#### LOS ANGELES

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

#### **MEXICO CITY**

Arquimedes No. 130, Oficina 105, Primer Piso Col.Polanco Del. Miguel Hidalgo, C.P.11570 Ciudad de Mexico Phone : (+52-55) 50836055/57 Fax : (+52-55) 50836056

mail	: info@itpcmexicocity.mx
Vebsite	: www.itpcmexicocity.mx

#### MILAN

Via Vittor Pisani 8, 6 <sup>th</sup> floor, 20124 Milano 🚽		
Phone	: (+39-02) 36598182	
Fax	: (+39-02) 36598191	
Email	: info@itpcmilan.it;	
Website	: www.itpcmilan.it	

#### OSAKA

Matsushita IMP Building 2F 1-3-7, Shiromi, Chuo-ku Osaka 540-6302 Japan Nagahori Tsurumi Ryokuchi Line Osaka Business Park St. Exit 4 Phone : (+06) 69473555 Fax : (+06) 69473556 Email : itpc.osaka@kemendag.go.id Website : www.itpc.or.jp

#### SANTIAGO

Nueva Tajamar 481, Torre Sur, Officina 706, Las Condes Phone : (+562) 4410494 Fax : (+562) 4410495 Email : itpc@itpcsantiago.cl Website : www.itpcsantiago.cl

#### SAO PAULO

Edificio Park Lane, Alameda Santos No.1787 -Conj.111-110 Andar Cerqueira Cesar, ZIP 01419-002 Brazil Phone : (+55-11) 32630472 Fax : (+55-11) 32538126 Email : itpcsp@itpcsp.org Website : www.itpcsaopaulo.org

#### SHANGHAI

Shanghai Mart Building (Office Tower) 10/F Rooms B 50, Yan,an Road West No. 2299, Changning District Shanghai 200336 PR China Email : itpc.shanghai@kemendag.go.id

#### SIDNEY

Level 2, 60 Pitt Street - Sidney New South Wales 2000 Australia Phone : (+61-2) 92528783 Fax : (+61-2) 92528784 Email : trade@itpcsydney.com Website : www.itpcsydney.com



# TRADE PO Indonesia







The Ministry of Trade of The Republic of Indonesia Directorate General of National Export Development

> Phone : +6221-3510-347/2352-8645 Fax : +6221-2352-8645 tradeexpoindonesia@kemendag.go.id

www.tradeexpoindonesia.com

DJPEN - Direktorat Jenderal Pengembangan Ekspor Nasional Kementerian Perdagangan

> JI.M.Ridwan Rais No.5, Gedung Utama Lantai 3 Jakarta Pusat, INDONESIA 10110 Telp. : (62-21) 3858171 Fax. : (62-21) 23528652 www. djpen.kemendag.go.id

CSC@kemendag.go.id CSC@kemendag.go.id CSC Kemendag @csckemendag