

Guide to Agricultural Investment and Trade Opportunities in

INDONESIA



Ministry of Agriculture
Republic of Indonesia

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Ministry of Agriculture Republic of Indonesia



President of Republic of Indonesia



Susilo Bambang Yudhoyono

Noted:



“My government is adopting what I call the triple Strategy:

First, to promote growth through export and investment; **secondly**, to promote employment by stimulating the real (industrial) sector and **thirdly**, to reduce poverty by **promoting agriculture and rural development.**”

The Economic Development Agenda

1. Agriculture revitalization.
2. Increasing of investment and non-oil export.
3. Macro economic stabilization.
4. Poverty alleviation.
5. Rural development.
6. Maintenance and improvement of natural resources and environment.



Message From Minister Of Agriculture



Through the years, Indonesia has gradually gained popularity as an attractive partner country for agriculture investment and trade. The steady increase of the sales of Indonesian agricultural products over the decades in a positive outgrowth, signals that Indonesia has indeed deserves the recognition of being a country with growing economy.

The role of Agriculture in Indonesian economy, accounting for 10.48 % of GDP and employing approximately 42 million (40% of the labor force). Indonesia is a major producer and exporter for many commodities such as palm oil, rubber, coconut, coffee, tea, cocoa, pepper etc. Export of ornamental plants and tropical fruits are growing in recent years.

In order to accelerate agriculture development in Indonesia, 5 main agenda (Panca Yasa) has been applied. since 2005: Agricultural infrastructure development; Strengthening farmer's institution; Revitalization of extension workers; Improving accessibility of farmer to capital; and Improving agricultural marketing system. This leads to the increase of farmer's welfare and reduce poverty in rural areas.

As such, I would like to encourage and welcome international business players to establish fruitful cooperation in Indonesia.

Sincerely,

A handwritten signature in black ink, appearing to be 'A. Apriyantono'.

Dr. Ir. Anton Apriyantono, MS.

Minister of Agriculture
Republic of Indonesia



Foreword

Facing the global trade, Indonesia will enhance competitiveness of products and services, expand bilateral, regional and multilateral cooperation for market access and technical issues and actively participating in International promotion. Market target is not limited to increase market share for conventional products. Introducing innovative products to create market will be a new breakthrough in promotion and market development. Global issues such as Good Agricultural Practices (GAP). Millennium Development Goals and food safety have already become fully concern of the government and all stakeholders.

This book is meant to guide the readers who are interested in establishing agriculture business in Indonesia in the field of crop production, post harvest, processing as well as marketing of various agricultural products including food crops, horticulture, estate crops and livestock. A brief of data, policies and some investment opportunities are shown to create greater awareness and stimulate more interest about agriculture investment and trade opportunities in Indonesia. Detail information could be obtained directly in the field through provincial as well as districts government.

Should any of serious business players interested in having further information, please contact office in the Ministry of Agriculture.

Sincerely,



Dr. Ir. Zaenal Bachruddin, M. Sc

Director General of Processing and
Marketing of Agricultural Products
Ministry of Agriculture



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I. OVERVIEW OF INDONESIA



1.1. Geography & Demography

Geography

The Republic of Indonesia is the largest archipelago country in the world, comprising 17,508 islands stretching along 5,120 kilometers from east to west, and 1,760 kilometers from north to south. The islands scatter over more than one tenth of the equator between Southeast Asia and Australia, covering a land area of around 2 million square kilometers and territorial waters nearly four time of that size.

1. Main islands: Java, Bali, Sumatera, Kalimantan, Sulawesi, and Papua. There are two large groupings of smaller islands: Maluku and Nusa Tenggara.
2. Main cities :
 - a. Jakarta, the capital city of the Republic of Indonesia located on the north west coast Java, is the government and an economic center of Indonesia.

- b. Surabaya, Indonesia's second largest city located in East Java is a leading industrial center and port.
- c. Medan in North Sumatera, is the third largest city near of Singapore/ Selat Malaka.
- d. Other important cities are Bandung, Denpasar, Semarang, Yogyakarta, Padang, Palembang, Makassar, Manado, Banjarmasin, Balikpapan, and Jayapura.

At 1,919,440 square kilometers (741,050 sq mi), Indonesia is the world's 16th-largest country in terms of land area.[Its average population density is 134 people per square kilometer (347 per sq mi), 79th in the world, although Java, the world's most populous island, has a population density of 940 people per square kilometer (2,435 per sq mi). At 4,884 meters (16,024 ft),

Puncak Jaya in Papua is Indonesia's highest peak, and Lake Toba in Sumatra its largest lake, with an area of 1,145 square kilometers (442 sq mi). The country's largest

rivers are in Kalimantan, and include the Mahakam and Barito; such rivers are used as communication and transport links between the island's river settlements.

The archipelago of Indonesia comprises about 17,508 big and small islands, of which only about 6,000 are inhabited. Five main islands and 30 smaller island groups are home to the majority of the population. The main islands are Sumatera (425,606 km²), Kalimantan (539,460 km²), Sulawesi (174,219 km²), Irian Jaya (421,981 km²), and Java (129,187 km²) which is home to about 70% of the country's population. The archipelago lies on tropical zone of Southeast Asia. The equator passes through the islands of Sumatera, Kalimantan, Sulawesi, and Halmahera. Geographically, the archipelago is situated between 06°08 north latitude to 11°15 south latitude and 94°45 to 141°05 east longitude; between two continents: Asia and Australia; between two oceans: Indian and Pacific; and on the traditional trading crossroads.

Stretching along the equator of about 8,000 km long, it is the same width to the North American Mainland, or Australia Continent, or West European Continent. Total territorial area is 9.8 million km², a large part of which

(7.9 million km² or 81%) is sea, while the rest (1.9 million km² or 19%) is terrestrial land. Total coastline length of all islands is 54,716 km. Having such figures, Indonesia is recognized as the greatest maritime country in the world.

The archipelago of Indonesia is situated on the matching point of the two world greatest volcanic ranges, the Mediterranean from the west and Circum Pacific from the northeast, by which the volcanic pattern, physiographic, and geomorphology of the archipelago are strongly influenced.

There are about 400 mounts, most of which are volcanoes - either active or inactive ones - forming a bow of mountain ranges along the array of islands on the southern archipelago stretching from Sumatera, Krakatau on the Straits of Sunda, Java, Bali, Lombok, Sumbawa, and Flores. Kalimantan is the only island where volcano does not exist; instead, dense tropical rainforest naturally developed on the middle-range and peat-swamp ecosystems on the lowland. The highest summit of the archipelago is Mount Jayawijaya, about 5,000 m above sea level, where snow can be permanently found.



Green Yard

Facing the Indian Ocean, most of the coastlines of these islands are steep cliffs with very limited sand dunes. On the other hand, the inner northward coastlines are relatively flat, with substantially rapid coast expansion due to excessive sedimentation. On this type of coastline, mangrove forest communities exist, and brackish-water fish culture takes place on relatively developed areas.

Demography

The national population from the 2000 national census is 206 million, and the Indonesian Central Statistics Bureau and Statistics Indonesia estimate a population of 222 million for 2006. 130 million people live on the island of Java, the world's most populous island. Despite a fairly effective family planning program, which has been in place since the 1960s, the population is expected to grow to around 315 million in 2035, based on the current estimated annual growth rate of 1.25%.

1.2. Government's Administrative

Administratively, Indonesia consists of 33 provinces, five of which have special status. Each province has its own political legislature and governor. The provinces are subdivided into district (kabupaten) and municipal (kota), which are further subdivided into subdistricts (kecamatan), and again into village groupings (either desa or kelurahan). Following the

implementation of regional autonomy measures in 2001, the regencies and cities have become the key administrative units, responsible for providing most government services. The village administration level is the most influential on a citizen's daily life, and handles matters of a village or neighborhood through an elected lurah or kepala desa (village chief).

Within a village there are some voluntary social organizations called Rukun Kampung (RK - Hamlets within a desa) or Rukun Warga (RW - Hamlets within a kelurahan), each is led by a voluntary social leader called Ketua RK or Ketua RW. Within each RK or RW, there is also some Rukun Tetangga (RT - Neighborhood). Led by a Ketua RT, each RT covers some neighboring households.

Aceh, Jakarta, Yogyakarta, Papua, and West Papua provinces have greater legislative privileges and a higher degree of autonomy from the central government than the other provinces. The Acehese government, for example, has the right to create an independent legal system; in 2003, it instituted a form of Sharia (Islamic law). Yogyakarta was granted the status of Special Region in recognition of its pivotal role in supporting Indonesian Republicans during the Indonesian Revolution. Papua, formerly known as Irian Jaya, was granted special autonomy status in 2001. Jakarta is the country's special capital region.

Profile of Selected Agricultural Products

Commodity	Production (000 Ton)	World Rank
Paddy	54,455	3
White Pepper	78	1
Palm Oil	11,862	2
Rubber	2,271	2
Cacao	749	3
Coffee	640	4
Tea	167	6
Coconut	3,097	4

Islands/Province	District/Municipal
Sumatra	
Aceh* (Nanggroe Aceh Darussalam) - Banda Aceh	West aceh, North West Aceh, Aceh Besar, Aceh Jaya, South Aceh, Aceh Singkil, Aceh tamiang, Central Aceh, South East Aceh, East Aceh, North Aceh, Bener Meriah, Bireuen, Gayo, Lues, Nagan Raya, Pidie, Simeulue, Banda, Aceh, Langsa, Lhokseumawe, Sabang
North Sumatra (Sumatera Utara) - Medan	Asahan, Binjai, Dairi, Deli Serdang, Humbang Hasundutan, Karo, Labuhan Batu, Langkat, Mandailing-Natal, Medan, Nias, South Nias, Padang Sidempuan, Pakpak Barat, Pemantang Siantar, Samosir, Serdang, Bedagai, Sibolga, Simalungun, Tanjung Balai, South Tapanuli, Central Tapanuli, North Tapanuli, Tebing Tinggi, Toba Samosir
West Sumatra (Sumatera Barat) - Padang	Agam, Dharmas Raya, Lima Puluh Kota, Mentawai Islands, Padang Pariaman, Pasaman, West Pasaman, South Pesisir, Sawah Lunto Sijunjung, Tanah Datar, Bukit Tinggi, Padang, Padang Panjang, Pariaman, Payakumbuh, Sawah Lunto, Solok City, Solok, South Solok
Riau – Pekanbaru	Bengkalis, Indragiri Hulu Kampar, Pekanbaru, Dumai, Kuantan Singingi, Rokan Hulu, Rokan Hilir, Siak, Pelalawan
Riau Islands (Kepulauan Riau) - Tanjung Pinang	Karimun, Riau Islands, Lingga, Natuna, Batam, Tanjung Pinang
Jambi - Jambi (city)	Kerinci, Merangin, Sarolangun, Batanghari, Muaro Jambi, East Tanjung Jabung, West Tanjung Jabung, Tebo, Bungo, Jambi
South Sumatra (Sumatera Selatan) – Palembang	Ogan Komering Ulu, Ogan Kumering Ilir, Muara Enim, Lahat, Musi Rawas, Musi Banyuasin, Banyuasin, East Ogan Komering Ulu, South Ogan Komering Ulu, Ogan Ilir, Palembang, Prabumulih, Pagar Alam, Lubuk Linggau
Bangka-Belitung (Kepulauan Bangka-Belitung) - Pangkal Pinang	Bangka, Belitung, West Bangka, Central Bangka, South Bangka, East Belitung, Pangkal Pinang
Bengkulu - Bengkulu (city)	South Bengkulu, Rejang Lebong, North Bengkulu, Kaur, Seluma, Muko Muko, Lebong, Kepahyang, Bengkulu
Lampung - Bandar Lampung	West Lampung, Tenggamas, South Lampung, East Lampung, Central Lampung, North Lampung, Way Kanan, Tulang Bawang, Bandar Lampung, Metro
Java	
Jakarta* - Jakarta	West Jakarta, Central Jakarta, North Jakarta, East Jakarta, South Jakarta, Seribu Islands

Banten – Serang	Lebak, Pandeglang, Serang, Tangerang, Cilegon, Tangerang
West Java (Jawa Barat) - Bandung	Bandung, Bekasi, Bogor, Ciamis, Cianjur, Cirebon, Garut, Indramayu, Karawang, Kuningan, Majalengka, Purwakarta, Subang, Sukabumi, Sumedang, Tasikmalaya, Bandung, Banjar, Bekasi< Bogor, Cimahi, Cirebon, Depok, Sukabumi, Tasikmalaya
Central Java (Jawa Tengah) - Semarang	Cilacap, Banyumas, Purbalingga, Banjarnegara, Kebumen, Purworejo, Wonosobo, Magelang, Boyolali, Klaten, Sukoharjo, Wonogiri, Karanganyar, Sragen, Grobogan, Blora, Rembang, Pati, Kudus, Jepara, Demak, Semarang, Temanggung, Kendal, Batang, Pekalongan, Pemalang, Tegal, Brebes, Magelang, Surakarta, Salatiga, Semarang, Pekalongan, Tegal
Yogyakarta Special Region* - Yogyakarta (city)	Bantul, Gunung Kidul, Kulon Progo, Sleman, Yogyakarta
East Java (Jawa Timur) - Surabaya	Bangkalan, Banyuwangi, Blitar, Bojonegoro, Bondowoso, Gresik, Jember, Jombang, Kediri, Lamongan, Lumajang, Madiun, Magetan, Malang, Mojokerto, Nganjuk, Ngawi, Pacitan, Pamekasan, Pasuruan, Ponorogo, Probolinggo, Sampang, Sidoarjo, Situbondo, Sumenep, Trenggalek, Tuban, Tulungagung, Batu, Blitar, Kediri, Madiun, Malang, Mojokerto, Pasuruan, Probolinggo, Surabaya
Lesser Sunda Islands	
Bali – Denpasar	Badung, Bangli, Buleleng, Gianyar, Jembrana, Karangasem, Klungkung, Tabanan, Denpasar
West Nusa Tenggara (Nusa Tenggara Barat/NTB) – Mataram	Bima, Dompu, West Lombok, Central Lombok, East Lombok, Sumbawa, West Sumbawa, Mataram, Bima
East Nusa Tenggara (Nusa Tenggara Timur/NTT) – Kupang	Alor, Belu, Ende, East Flores, Kupang, Lembata, Manggarai, West Manggarai, Ngada, Rote Ndao, Sikka, West Sumba, East Sumba, South Central Timor, North Central Timor, Kupang
Kalimantan	
West Kalimantan (Kalimantan Barat) - Pontianak	Bengkayang, Kapuas Hulu, Ketapang, Landak, Melawi, Pontianak, Samba, Sanggau, Sekadau, Sintang, Pontianak, Singkawang
Central Kalimantan (Kalimantan Tengah) – Palangkaraya	South Barito, East Barito, North Barito, Gunung Mas, Kapuas, West Kota Waringin, East Kota Waringin, Lamandau, Murung Raya, Pulang Pisau, Sukamara, Seruyan, Katingan, Palangkaraya
South Kalimantan (Kalimantan Selatan) – Banjarmasin	Balangan, Banjar, Barito Kuala, South Hulu Sungai, Central Hulu Sungai, North Hulu Sungai Baru, Kota Baru, Tanah Laut, Tabalong, Tanah Bumbu, Tapin, Banjarbaru, Banjarmasin
East Kalimantan (Kalimantan Timur) – Samarinda	Berau, Bulungan, West Kutai, Kutai Kartanegara, East Kutai, Malinau, Nunukan Pasir, North Penajam Paser, Balikpapan, Bontang, Samarinda, Tarakan

Sulawesi	
North Sulawesi (Sulawesi Utara) - Manado	Bolaang Mongondow, Sangihe Islands, Talaud Islands, Minahasa, South Minahasa, North Minahasa, Tomohon, Manado, Bitung
Gorontalo - Gorontalo (city)	Boalemo, Bone Bolango, Gorontalo, Pohuwato, Gorontalo
Central Sulawesi (Sulawesi Tengah) - Palu	Banggai, Buol, Donggala, Banggai Islands, Morowali, Parigi Moutong, Poso, Tojo Una-Una, Toli-Toli, Palu
West Sulawesi (Sulawesi Barat) - Mamuju	Majene, Mamasa, Mamuju, North Mamuju, Polewali Mamasa, Mamuju
South Sulawesi (Sulawesi Selatan) – Makassar	Bantaeng, Barru, Bone, Bulukumba, Enrekang, Gowa, Jenepono, Pangkajene Islands, Luwu, East Luwu, Maros, Pinrang, Selayar, Sinjai, Sidenren Rappang, Soppeng, Takalar, Tana Toraja, Wajjo, Makassar, Palopo, Pare-Pare
South East Sulawesi (Sulawesi Tenggara) – Kendari	Bombana, Buton, Kendari, Kolaka, South Konawe, Muna, Wakatobi, Bau-Bau, Kendari
Maluku islands	
Maluku – Ambon City	Buru, Aru Islands, Central Maluku, South East Maluku, West South East Maluku, West Seram, East Seram, Ambon
North Maluku (Maluku Utara) - Ternate	West Halmahera, South Halmahera, Central Halmahera, East Halmahera, North Halmahera, Sula Islands, Ternate, Tidore Islands
Papua	
West Papua* (Papua Barat) - Manokwari	Asmat, Biak Numfor, Boven Digoel, Jayapura, Jayawijaya, Keerom, Mappi, Merauke, Mimika, Nabire, Paniai, Pegunungan Bintang, Puncak Jaya, Sarmi, Supriori, Tolikara, Waropen, Yahukimo, Yapen Waropen, Jayapura
Papua*- Jayapura	Fak-Fak, Kaimana, Manokwari, Raja Ampat, Sorong, Sorong Selatan, Sorong City

* indicates provinces with Special Status

1.3. Climate

Climate and Weather Characteristics

The archipelago of Indonesia belongs to the Austral-Asiatic tropical zone. Climatic and weather condition of the archipelago is characterized by an equatorial double rainy season. Its variation is caused by the equatorial circulation and the meridional circulation.

Displacement of the meridional circulation is closely related to the north-south relative movement of the sun and its position at a certain period with regard to the earth and the continents of Asia and Australia. These factors contribute to the displacement and intensity of the Inter-Tropical Convergence Zone being an equatorial trough of low pressure. This characterizes the weather of Indonesia; while the prevalence of the west monsoon and the east monsoon (wet and dry

Monsoon and Rainfall

When relative position of the sun is on the north hemisphere from mid-March to mid-September, relatively dry winds blow over the archipelago from the southeast - the arid continent of Australia; and east monsoon characterizing dry season takes place on a large part of the archipelago. The dry season is generally prevailing from May to September. On the other hand, when relative position of the sun is on the south hemisphere from mid-September to mid-March, wet winds blow over the archipelago from the northeast - the humid continent of Asia; then west monsoon characterizing wet season takes place in most parts of the archipelago. The wet season is generally prevailing from December to March.

However, these patterns do not always rigidly take place since a large part of the archipelago is covered by sea and diurnal differences are not significant, which makes precipitation be possible anytime. Sunshine is abundant, but rainfall - either heavy or light storms - can also drop in the dry season period. Rain even falls nearly all the year round on the islands where equator passes through, and this had resulted in dense natural tropical rainforest on the islands of Sumatera, Kalimantan, Sulawesi, and also in Irian Jaya.

Humidity and Temperature

Being within the humid equatorial zone, Indonesia has a high degree of air relative humidity with an average minimum of 60%. A minimum of 20% was observed in Jakarta in 1972. On the average, the mean annual air relative humidity ranges around 80% - 90%.

The annual mean air temperature in Indonesia is around 33°C. As for the higher mountainous region, the monthly mean air temperature ranges approximately 25°C - 28°C. The mean maximum temperature can reach 33°C, whereas the mean minimum air temperature is 21°C.

Wind and Storm

The average wind velocity is generally less than 15 knots per hour. Strong wind may be blowing occasionally in any parts of Indonesia that is usually closely related to tropical storms. Wind velocities of 45 knots per hour

were reported from Rembiga in January 1976, from Surabaya in January 1973, and from Ujungpandang in January 1974.

Nevertheless, the tropical storms are rare in Indonesia as it is anticipated that these would not develop in land areas within the latitude of less than 70°. Despite this anticipation, however, reports of tropical storms were recorded at Banda area in April 1778, at the islands of Rote and Timor in April 1843, and the giant ones at Timor in 1918 and on the island of Flores in 1973 and 1993.

Today's Weather Forecasts

Weather forecasts for some big cities in Indonesia are provided. Thanks to the Weathernews Inc., the daily and weekly weather forecast data are automatically updated. You may also view the satellite imagery presenting current weather conditions of Central Asia and Pacific Rim, where Indonesian Archipelago lies.

1.4. Living in Indonesia

Cultural tourism

Indonesia consists of at least 300 ethnic groups, spread over a 1.8 million km² area of 6,000 inhabited islands. This creates a cultural diversity, further compounded by Hindu, Buddhist, Islamic and European colonialist influences.

From the 3rd century until the 13th century, Hinduism and Buddhism shaped the culture of Indonesia. The best-preserved Buddhist shrine, which was built during the Sailendra dynasty in the 8th century, is Borobudur temple in Central Java. A few kilometers to the southeast is the Prambanan complex, a Hindu temple built during the second Mataram dynasty. Both the Borobudur and the Prambanan temple compounds have been listed in the UNESCO World Heritage list since 1991. In Bali, where most Hindus live, cultural festivals are major attractions to foreign tourists.

Islam has also contributed greatly to the cultural society

in Indonesia. As of 2006, about 88% of Indonesians are Moslem. Islamic culture is prominent in Sumatra, and a few of the remaining sultanate palaces can be seen in Medan and Pekanbaru.

Despite foreign influences, a diverse array of indigenous traditional cultures is still evident in Indonesia. The indigenous ethnic group of Toraja in South Sulawesi, which still has strong animistic beliefs, offers a unique cultural tradition, especially during funeral rituals. The Minangkabau ethnic group retain a unique matrilineal culture, despite being devoted Muslims. Other indigenous ethnic groups include the Asmat and Dani in Papua, Dayak in Kalimantan and Mentawai in Sumatra, where traditional rituals are still observed.

A discussion of cultural tourism is not complete without a mention of Yogyakarta, a special province in Indonesia known as a centre of classical Javanese fine art and culture. The rise and fall of Buddhist, Hindu, and Islamic kingdoms in Central Java has transformed Yogyakarta into a melting pot of Indonesian culture.

Accommodation

The standards and types of accommodation available to the tourist vary from 5 star hotels to basic beach huts, with something to suit every taste and budget. Most large cities and tourist resorts have a selection of hotels, but the predominant form of accommodation is the family run hostel which can be found wherever there are budget travelers. These *losmen* provide not only accommodation, but often also will offer food and information for the traveler. In very remote villages, it might be necessary to discuss accommodation requirements with the village head. In Ubud, and elsewhere in Bali, many guest houses have been set up using the traditional family compound as their setting.

Food in Indonesia

The variety of cultures in Indonesia is reflected in the wide range of foods in the nation. Since the 15th century, many European traders have visited the archipelago to buy different kinds of spices, including pepper and rice. In modern times, many cultures and countries have influenced the cuisine of Indonesia, such as Western culture and Asian culture. Many claim that this diversity has resulted in one of the most unique cuisines in the world.

Rice is Indonesia's most important staple food. The rice is usually served with a side dish, such as chicken, meats and vegetables. Although the meals are generally simple, the plentiful use of various roots, spices, grasses, and leaves adds flavor to most dishes. Other main meals, such as potato, noodles, soybeans and wheat are common. The most common method for preparing food is frying, though grilling, simmering, steaming and stewing are also used.

Indonesian cuisine is also influenced by Western culture. The most obvious example is the presence of fast food companies in Indonesia, such as McDonald's, KFC and Pizza Hut.

International airports

Each of the larger Indonesian islands, have at least one international airport. The biggest airport in Indonesia, Soekarno-Hatta International Airport, is located in Tangerang Regency, Banten. There are four more international airports on Java, Adisumarmo International Airport in Central Java, Juanda International Airport in East Java, Achmad Yani International Airport in Central Java and Adisucipto International Airport in Yogyakarta. On Kalimantan there is one international airport and there are two on Sumatra. Bali, which is part of the Nusa Tenggara Islands, has the Ngurah Rai International Airport.

1.5. Transport Infrastructure

All transport modes play a role in Indonesia's transport system and are generally complementary rather than competitive. Road transport is the predominant mode, accounting for about 70 percent of freight ton-km and 82 percent of passenger km.

There are four unconnected railway networks in Java and Sumatra dedicated primarily to transport bulk commodities and long-distance passenger traffic. Sea transport is extremely important for economic integration and for domestic and foreign trade. It is well developed, with each of the major islands having at least one significant port city.

The role of inland waterways is relatively minor and is limited to certain areas of Eastern Sumatra and Kalimantan. The function of air transport is significant, particularly where land or water transport is deficient or non-existent and well established, based on an extensive domestic airline network where all major cities can be reached by passenger plane.

Roads and Highways

The total length of roads in 2004 reached about 340,000 km; out of which, 34,628 km were under the state responsibility; 649 km toll roads, 37,164 km under provincial responsibility; and the rest, 266,564 km under district responsibility.

Of the total road length, 58 percent is paved. The national road network is in good condition with 95 percent paved and 81 percent in good and fair condition. The provincial road network is also predominantly in good or fair condition. The district rural and urban roads are only 50 percent in reasonable condition. Densely populated Java, with 7 percent of Indonesia's land area and 62 percent of its population, accounts for 27 percent of the classified road network. At the other end of the spectrum, Maluku and Papua, with 23 percent of the land area and only 2 percent of population, account for 7 percent of the network.

Indonesia's first toll road was opened in 1978 and placed under the management of the state-owned toll road company, Jasa Marga which now has overall responsibility for some 515 km of toll roads. Around 460 km of which are on the island of Java. Since 1987, all proposed toll road projects have been required to be offered to private investors, and so far some 30 percent of the network in operation has been developed by private consortia. The number of motor vehicles registered by the State Police was 19 million in 1999 (excluded Timor Timur) and 27 million in 2003. The motor vehicles in 2003 consisted of 71 percent motorcycles, 13 percent passenger cars, 8 percent trucks, and 3 percent buses. Of the total 3.1 million motor vehicles assembled domestically about 90 percent were motorcycles.

Urban Transport

Before the 1997 crisis, major urban transport investments were undertaken. These included toll road developments involving public-private partnerships with significant local private investment. Many of these projects, which were implemented under Build, Operate, and Transfer (BOT) arrangements, are located around the metropolitan cities in Java, such as Jakarta, Ciawi, Bogor, Cikampek, Karawang, Surabaya, and Malang. Despite rapid infrastructure development in large urban areas, traffic congestion continues to hamper large cities like Jakarta, Bandung, Medan, Surabaya, and many satellite towns like Bogor, Bekasi, and Tangerang. Public transport, including buses, minibuses, and taxis, is commonly used despite poor public transport facilities. The city of Jakarta has implemented a Bus Rapid Transit system on several kilometers on key city route to help ease traffic congestion, particularly at peak times. Car ownership is increasing, following the liberalization of import motor vehicle rules. At least three million locally assembled motorcycles are added each year; transforming vehicular pollution in a serious problem for the largest cities, and a rapidly emerging one among the medium-size cities.

Rural Transport

With more than 292,000 km, about 80 percent of the total length of the road network is presently under the responsibility of the local governments. Some 11 million people in remote communities remain without direct access to the all-season road network, and an additional 6 million people reported to lack any reliable connection to the motorized transport network. The process for identifying road network links to villages (desa) which are still not connected has not been clearly established.

Railways

Indonesia has four unconnected railway systems, one in Java, and three in Sumatra. The Java railway's core passenger traffic is intercity with long distance services, such as Jakarta-Surabaya (820 km), and Jakarta-Yogyakarta (510 km); and medium distance services, such as Jakarta-Bandung (180 km), and Jakarta-Cirebon (200 km). The freight traffic moved by the Java railway consists mostly of petroleum fuel, fertilizer, cement, coal, and containers. The South Sumatra dominant traffic is coal, the West Sumatra railway carries mostly coal and cement, and the North Sumatra main traffic is crude palm oil. The total length of track in operation is 5,040 km of which Java is 3,700 km. The rail network is made of 1,067 mm gauge, and mostly singled tracked. Some sections in the Jakarta metropolitan region have been electrified to enable operation of suburban commuter services by electric railcars.

The total fleet consists of 468 locomotives that include diesel electric and diesel hydraulic locomotives. The average fleet age is approximately 30 years old. Due to inadequate maintenance and lack of spare parts, the availability and reliability is low. Revenue contribution and traffic composition vary significantly among the four railway systems. The Java railway contributes about 75 percent of the Indonesian Railways revenues, with passenger transport accounting for 83 percent of the total. The South Sumatra Railway

generates some 20 percent of total revenues, of which freight accounts for 90 percent. The West Sumatra and North Sumatra contribute only 2 percent and 3 percent of total revenues, of which freight accounts for 100 percent and 60 percent respectively.

Inland Waterways

There are more than 10,000 km of navigable waterways among 50 river systems. Over half of these rivers are in Kalimantan and the rest in Sumatra. These were originally used mainly for long-haul transport. Most of the vessels and terminals on the inland waterways system are owned and operated by the private sector. Some infrastructure improvements have been carried out, like the construction of new wharves, dredging of river channels at several river ports, and installation of navigational aids. However, because of the high seasonal variation in the water level of many rivers, without further investment for improvement of crucial sections, the role of inland waterways is relatively minor, and limited to certain areas of Sumatra and Kalimantan

Port and Shipping

Indonesia has some 300 public ports scattered over the archipelago. Of these, 43 are international liner service ports; the rest are feeder, and special ports, serving inter-island, local (small motorized vessels up to 250 dwt operating in short inter-island or coastal routes) and sailing vessels (small wooden hulled vessels which mainly depend on a combination of wind power and motor propulsion). The most important ports are Jakarta (Tanjung Priok), Surabaya, Semarang and Cirebon in Java; Belawan, Pandang, and Panjangan in Sumatra; Balikpapan, Banjarmasin, and Samarinda in Kalimantan; Ujung Pandang and Bitung in Sulawesi; Ambon in Maluku; and Sorong in Irian Jaya.

Jakarta, Surabaya, Belawan, and Ujung Pandang, the four largest ports, handle most of Indonesia's export and import cargoes, except for special commodities such as crude oil, logs, timber, rubber, palm oil, and fertilizer

which use specialized ports. Much of the domestic traffic originates or is destined to these four ports.

Inter-island shipping is the prevailing means for distributing goods through the ports in Indonesia. The cargo volume carried by inter-island shipping services reaches over 300 million tons, far exceeding international trade volume. It is estimated that inter-island shipping accounts for 60 percent of the total sea borne cargo movement in the country. Especially, for remote islands like Sulawesi and others, the percentages of cargoes carried by inter-island shipping are even higher.

About 14 million passengers a year are traveling by inter-island shipping. In remote islands a higher percentage of the total number of passengers is traveling by inter-island transport means. There are two distinct types of inter-island shipping services: ferry, and shipping services. Ferries are generally point-to-point services offered over a relatively short distance, typically between adjacent islands, and use ro-ro vessels that carry a mix of passengers, cars, and trucks. Whereas, shipping services are offered on more complex routes, commonly use lift-on lift-off vessels, and are mostly dedicated cargo services.

Air Transport

Air transport is rapidly increasing; not only, driven by the insufficient water and land country's thousands of islands, and for some areas, the only option. Indonesia has adopted the standards of the International Civil Aviation Organization with only minor variations, but the compliance with the standards is far from uniform. Indonesia's sudden air transport development became possible by the collapse of the "New Order" regime in 1998. Before 1999, there were five scheduled carriers and a few charter operators.

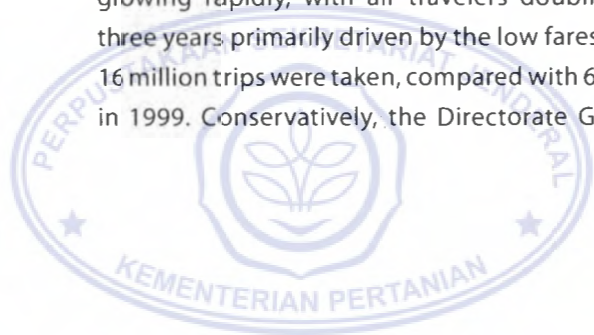
In 2004, there were 23 scheduled airlines operating and 37 licenses had been issued. Air transport is growing rapidly, with air travelers doubling every three years primarily driven by the low fares. In 2003, 16 million trips were taken, compared with 6.6 million in 1999. Conservatively, the Directorate General of

Air Communication estimated in 20 million the seats sold in 2004, which is 7 million more than in 1997.

1.6. Economy

Indonesia, a vast polyglot nation, has struggled to overcome the Asian financial crisis, and still grapples with persistent poverty and unemployment, inadequate infrastructure, endemic corruption, a fragile banking sector, a poor investment climate, and unequal resource distribution among regions. The country continues the slow work of rebuilding from the devastating December 2004 tsunami and from an earthquake in central Java in May 2006 that caused over \$3 billion in damage and losses. Declining oil production and lack of new exploration investment turned Indonesia into a net oil importer in 2004. The cost of subsidizing domestic fuel placed increasing strain on the budget in 2005, and combined with indecisive monetary policy, contributed to a run on the currency in August, prompting the government to enact a 126% average fuel price hike in October. The resulting inflation and interest rate hikes dampened growth through mid-2006, while large increases in rice prices pushed millions more people under the national poverty line.

Economic reformers introduced three policy packages in 2006 to improve the investment climate, infrastructure, and the financial sector, but translating them into reality has not been easy. Keys to future growth remain internal reform, building up the confidence of international and domestic investors, and strong global economic growth. Significant progress has been made in rebuilding Aceh after the devastating December 2004 tsunami, and the province now shows more economic activity than before the disaster. Unfortunately, Indonesia suffered new disasters in 2006 and early 2007 including a major earthquake near Yogyakarta, an industrial accident in Sidoarjo, East Java that created a "mud volcano," a tsunami in South Java, and major flooding in Jakarta, all of which caused additional damages in the billions of dollars. Donors are assisting Indonesia with its disaster mitigation and early warning efforts.



Macro Economy

Macro Economic Indicators	2004	2005	2006	2007
GDP annual growth (%)	5.0	5.7	5.5	6.3
Inflation (%)	6.4	17.1	6.6	6.6
Average Exchange Rate (IDR/US\$)	8,940	9,713	9,167	9,140
Monthly Interest Rate (Central Bank of Indonesia)	7.43	12.75	9.75	8.00
Ongoing Transactions/GDP	0.6	0.1	2.9	2.5
GDP by Consumptions				
Consumption	5.0	4.0	3.2	5.0
Gross Domestic Fixed Assets	14.7	10.9	2.5	9.2
Exports of Goods & Services	13.5	16.4	9.4	8.0
Imports of Goods & Services	26.7	17.1	8.6	8.9
GDP by Industrial Sectors (%)				
Agriculture, Livestock, Forestry & Fishery	2.8	2.7	3.4	3.5
Mining and Quarrying	-4.5	3.2	1.7	2.0
Manufacturing Industry	6.4	4.6	4.6	4.7
Electricity, Gas, and Water Supply	5.3	6.3	5.8	10.4
Construction	7.5	7.4	8.3	8.6
Trade, Hotel, and Restaurant	5.7	8.4	6.4	8.5
Transport & Communication	13.4	13.0	14.4	14.4
Finance, Real Estate, & Business Services	7.7	6.8	5.5	8.0
Services	5.4	5.0	6.2	6.6
Unemployment Rate	9.4	10.8	10.3	9.1
Poverty Rate	16.7	16.0	17.7	16.6
GDP per Capita (in thousands Rupiah)	10,506	12,700	15,000	17,600
GDP per Capita (US\$)	1,167	1,321	1,663	1,947
Monetary Aggregate				
M2 Growth, end period	8.1	16.4	14.9	18.9
M1 Growth, end period	13.4	11.1	28.1	27.6
Base money growth, end period	19.8	20.2	23.9	27.8
Interest Rate				
PUAB (overnight)	6.9	10.0	6.0	6.5
Deposit (one month)	6.4	10.4	9.0	7.2
Credit for working capital	13.4	15.2	15.1	13.0
Investment Credit	14.0	14.9	15.1	13.0
Balance of Payment				
DSR (Debt to Service Ratio)	27.1	17.3	24.8	19.2
Foreign Exchange reserves (in month)	5.5	4.3	4.5	5.7

Source : www.bi.go.id (Indonesian Central Bank, Economic report) and www.bkpm.go.id

II. AGRIBUSINESS INVESTMENT REFORM



The investment environment provided by the Indonesian government is primarily intended to create a more conducive environment for agribusiness development and an incentive for farmer and private enterprises to carry out agricultural activities. Hence, investment by both foreign and domestic investors is aimed at stimulating and encouraging investment in production activities with the direct involvement of farmers and other parties in private sectors.

The primary target of this investment is increasing production in food crops, horticulture, estate plantation and livestock; the investment also plans to create production facilities for inputs like fertilizers and agricultural machinery. It is expected that these investments in processing, distribution and marketing activities, as well as the financial system will accelerate the development of agribusiness in rural areas.

2.1. Domestic Investment

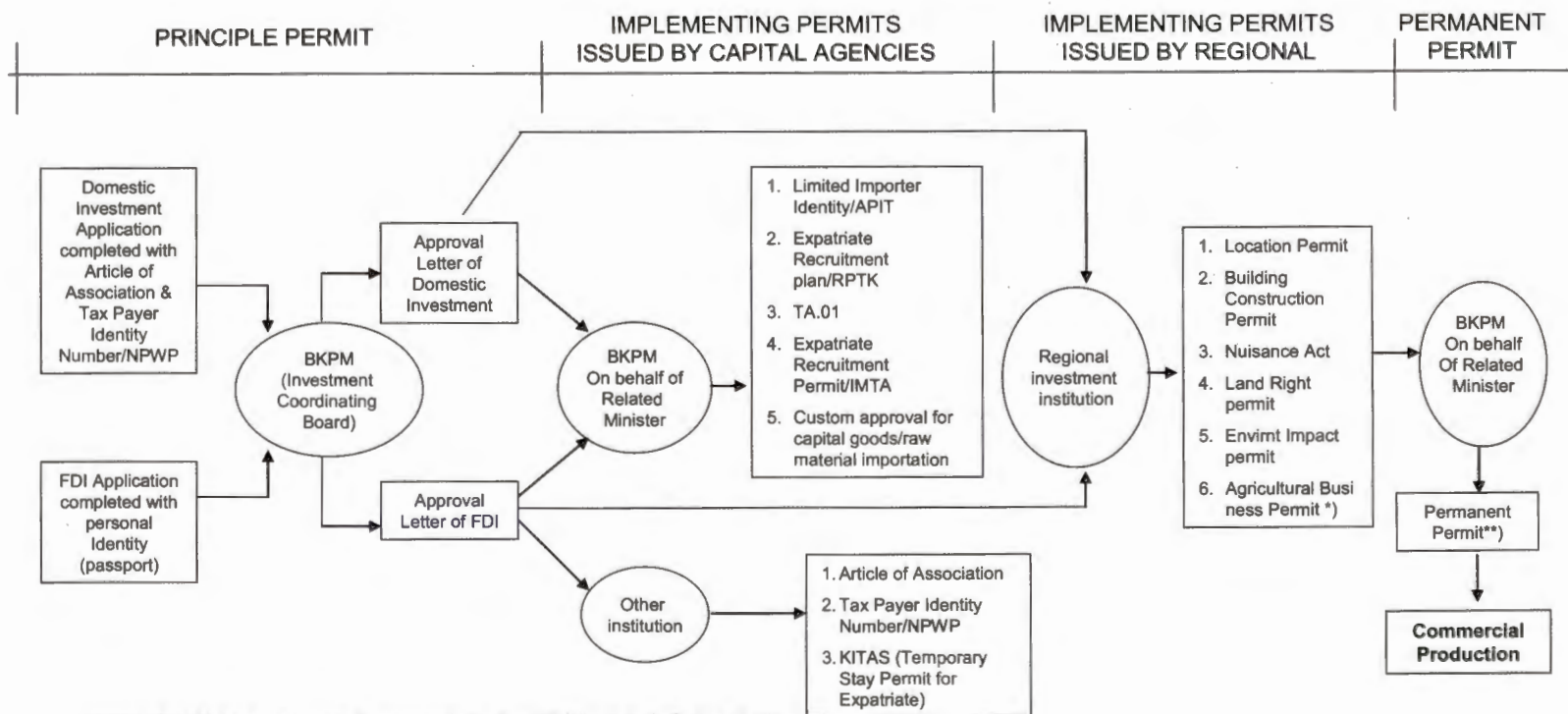
During the 2005-2006 periods, total domestic investment in agribusiness was Rp. 40.713,1 Billion. With largest contribution invested in Food industry and estate crop. Due to the economic crisis, this number declined to Rp. 766 billion in 1998. However, the domestic agribusiness investment about Rp. 763,3 billion due to the more actable economic and political condition in Indonesia. And in 2006, the number domestic investment was Rp.28.301,7 Billion.

2.2. Foreign Investment

Foreign investment trend were decrees, during period 2005 - 2006 total foreign investment in agribusiness was US\$.3,009.3 billion and average US\$.1,504.7 billion. In 2006, the number foreign investment was US\$.1,904.9 billion. However during 2006 the number of foreign investment was growing as well as the domestic investment.

APPENDIX 2

FLOWCHART OF APPROVAL/PERMIT APPLICATION OF INVESTMENT IN INDONESIA



*) Issued after obtained a Technical Recommendation from Minister of Agriculture such as :
Plantation Business Permit (IUP), Horticulture Business Permit (IUH)

***) Issued after Company ready to Commercial Production

FDI (Foreign Direct Investment)



2.4. Investment Policies Statement

Recognizing, that the importance of private sector investment to achieve sustainable economic growth, employment creation, development of strategic national resources, transfer and implementation of competitive technology and technical skills, export growth and improved balance of payments.

Appreciating, that an appropriate legal framework is prerequisite to promoting a stable, predictable and attractive business environment that will encourage and support private economic activity by Indonesian and foreign investors.

Acknowledging, that an appropriate legal framework for investment must provide certain key principles, among which are: equal treatment of investors in similar circumstances irrespective of nationality; protection against expropriation, confiscation or requisition of investments and unilateral alteration or termination of contracts; freedom to repatriate foreign investment capital and net proceeds thereon; and access to impartial, quick and effective mechanisms for the resolution of commercial and other investment disputes.

Cognizant, that these principles have increasingly been adopted as standard international practice and have been incorporated into national legislation in many countries, both regionally and globally, and have been recognized in various international documents, including the GATT/WTO Agreements, the APEC Non Binding Investment Principles, and numerous bilateral investment agreements.

Undertake and Resolves to reform the investment policies, legislation and regulations of the Republic so as to create an enabling environment for private investment consistent with the above stated principles, to be characterized by active promotion and facilitation of investment, transparent criteria for the admission and establishment of investments, transparency of

government procedures and administration, and minimized restrictions, prohibitions, screening and licensing requirements based on a short "Negative List" of restricted investments.

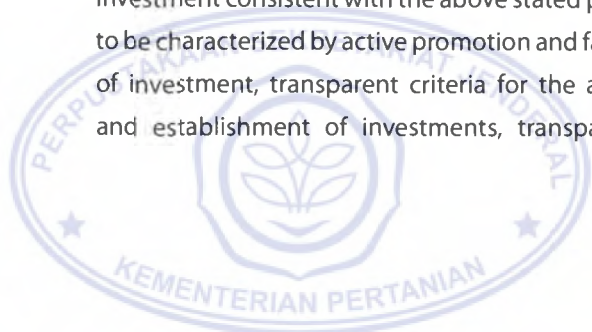
The government has therefore established an Investment Policy Reform Initiative having as its objective the encouragement and facilitation of private sector investment through reform and implementation of transparent, predictable, market oriented policies applied equally to both foreign and domestic investors. In this the Government has recently adopted major policy changes, including liberalizing the rules for foreign investment. The Government is committed to the rapid elimination of the remaining restriction on foreign and local private investment. This statement sets forth newly adopted and current policies of the Government for promoting and facilitating private sector investment in Indonesia. The Government is fully committed to these policies and will take the necessary steps to ensure their effective implementation. This statement will be supplemented by detailed investment guidelines to be issued in the near future. To encourage and facilitate private investment, the Government has adopted the following policies.

Freedom to Invest

Investors shall be permitted to invest in any sector of the economy except in a small number of activities, which are listed on "Negative List". There shall be no restriction on the size of the investment, the source of funds or whether the products are destined for export or for the domestic market. Existing foreign investors may invest in activities other than those initially authorized, except for activities stated on "Negative List".

Company Formation

Industrial licenses are still needed based on the principles of fairness, simple, quick and transparent mechanism and procedure. Procedures for company formation are to be administered so as to permit prompt establishment of business enterprises.



Taxes and Duties

The Government is committed to enhance the country's investment climate and international competitiveness by further reducing and simplifying taxes and duties through ongoing tax and trade policy reform programs. The current Indonesia tax law provides tax incentive to investor who invests in certain sectors and or certain areas as follows:

- Investment Allowances,
- Accelerated depreciation and amortization,
- Expanded loss compensation but not more than 10 years,
- 10% tax rate for dividend paid to foreign taxpayer, except to prevail tax convention maintaining lower tax rate.
- Indonesia always tries to maintain equal treatment in tax law not only for taxpayers but also for tax cases that have similarities. By giving tax incentive to investors, Indonesia must assure that this incentive granted still reflect the principle of equal treatment and the application of that principle did not depart from the objective of tax incentive.

Availability of Foreign Exchange

The Government will continue to ensure, according to pre-set criteria and procedures that foreign exchange for import transactions and dividend payments is freely available and the Government is committed to ensuring the ease of repatriation of capital and payments for business services.

Access to Local Funding

The Government is considering introducing a simple system that will allow foreign investments access to local funding based on simple established criteria.

Labor Practices

Within the framework of the labor laws of Indonesia, the Government recognizes that enterprises may require foreign expertise. Accordingly, it will continue to make residence permits readily available according to prevailing regulation for key personnel required for employment in such enterprises.

General Infrastructure

The Government recognizes the importance of infrastructure to support investment and is committed to make available adequate infrastructure such as transport, electricity, water and communications through partnership mechanisms that attract private capital. Adequate legal protection including guarantees for the integrity of contracts will be provided.

Availability of Land

The Government is committed to ensure that land for industrial and commercial use is readily available to investors. The Government will receive and simplify all existing land licensing and environmental approval procedure to ensure transparency.

The Government is committed to develop new serviced industrial sites and has provided the necessary framework to enable private investors to develop industrial sites including through arrangements for subleasing to other investors.

Encouragement for Small and medium Enterprises

The country's small and medium scale enterprises hold great potential for rapid economic growth and employment creation. The Government is therefore dedicated to continuing with various programs assists these enterprises, including simplifying the regulatory and policy environment, removing obstacles to



securing access to raw materials, removing tax related impediments and improving access to credit.

The Government will promote mutually advantageous, commercially beneficial subcontracting/ partnership arrangements between large-scale foreign and local firms and small- and medium-scale business.

Investment Promotion

To further enhance the capacity of the BKPM and to create an integrated investment promotion regime, the Government is actively reviewing proposals for the formation of an independent, public private partnership to promote and facilitate all private investment in Indonesia.

Investment Services

The Government is committed that the investment services for foreign and domestic investment in the era of regional autonomy is more preferable than the current condition. Therefore, a "one stop service" system will be introduced to be implemented in the region.

Investment Protection

The Government recognizes that security of assets of investors is of paramount importance. It therefore, assures investors that it will avoid using any measures that will adversely affect their property rights. In the case of foreign investors, the Government has negotiated and concluded several bilateral investment treaties, which provide direct protection to investors for the security of their assets as well as assurances for the repatriation of proceeds from their investments. The Government will actively work to pursue to conclude additional bilateral investment treaties with other countries. Indonesia has also joined the Multilateral Investment Guarantee Agency (MIGA).

Double Taxation Relief

To improve economic and trade relationship with other countries, Indonesia would like to have certain law provisions that regulate the right of tax imposed from each country. The purposes of those provisions are achievement of rule of law, avoiding double taxation, and prevention of tax evasion. Government is entitled to make an agreement with other countries to avoid double taxation and to prevent tax evasion.

The framework and the matter of this agreement are based on international convention and other rule of laws and also the tax regulation of each country.

Arbitration

The Government recognized that foreign investors must have an appropriate forum to resolve disputes that can not be settled amicably. While such disputes would normally lie within the jurisdiction of a competent court, parties may agree in certain cases to pursue extra-judicial adjudication and to choose an appropriate forum, including international conciliation or arbitration. To that end, Indonesia has become a member of the International Center for Settlement of Investment Disputes (ICSID) at Washington DC.

2.5. Government Incentives

Import Duties

All investment projects of PMA as well as PMDN projects which are approved by the Investment Coordinating Board or by the Office of Investment in the respective districts, including existing PMA and PMDN companies expanding their projects to produce similar product(s) in excess of 30% of installed capacities or diversifying their products, will be granted the following facilities:

- a. Relief from import duty so that the final tariffs become 5 %. In the case of tariffs of import duty which are mentioned in the Indonesian



Customs Tariff Book (BTBMT) being 5% or lower, the effective tariffs shall be those in BTBMT:

- o On the importation of capital goods namely machinery, equipments, spare parts and auxiliary equipments for an import period of 2 (two) years, started from the date of stipulation of decisions on import duty relief.
- o On the importation of goods and materials or raw materials regardless of their types and composition, which are used as materials or components to produce finished goods for the purpose of two years full production (accumulated production time).

- b. Exemption from Transfer of Ownership Fee for ship registration deed / certificate made for the first time in Indonesia.

Tax Facilities

- a. The government has introduced a Tax Bill No's 16, 17, 18, 19 and 20 of 2000 and applied since January 1, 2001. Based on this tax law, the domestic and foreign investors will be granted tax allowances in certain sector and/or area as follows :

- An Investment Tax Allowance in the form of taxable income reduction as much as 30 % of the realized investment spread in 6 (six) years.
- Accelerated depreciation and amortization
- A Loss carried forward facility for period of no more than 10 (ten) years.
- A 10 % income tax on dividends, and possibly being lower if stipulated in the provisions of an existing particular tax treaty.

- b. The government has also introduced provisions No's 146 of 2000 of 2000 and 12 of 2001 on the importation and/or delivery of Selected Taxable Goods, and or the provision of Selected Taxable Services as well as the importation and or delivery of Selected Strategic Goods which are exempted from For certain industries or sectors and/or location of projects which are considered a national priority in terms of exports and the development of remote areas, the government will provide tax incentives.

Export Manufacturing

There are many incentives provided for exporting manufacture products. Some of these incentives are as follows;

- Restitution (drawback) of import on the importation of goods and materials needed to manufacture the exported finished products.
- Exemption from Value Added Tax and Sales Tax on Luxury goods and materials purchased domestically, to be used in the manufacturing of the exported products.
- The company can import raw materials required regardless of the availability of comparable domestic products.

Bonded Zones

The industrial companies which are located in the bonded areas are provided with many incentives as follows;

- Exemption from import duty, excise, income tax of Article 22, Value Added Tax on Luxury Goods on the importation of capital goods and equipment including raw materials for the production process.
- Allowed to divert their products amounted to 50% of their export (in term of value) for the

final products, and 100% of their exports (in term of value) for other than final products to the Indonesian customs area, through normal import procedure including payment of customs duties.

- Allowed to sell scrap or waste to Indonesian custom area as long as it contains at the highest tolerance of 5% of the amount of the material used in the production process.
- Allowed to lend their own machineries and equipments to their subcontractors located outside bonded zones for no longer than 2 (two) years in order to further process their own products.
- Exemption of Value Added Tax and Sales Tax on Luxury Goods on the delivery of products for further processing from bonded zones to their subcontractors outside the bonded zones or the other way around as well as among companies in these areas.

2.6. Land and Building

Indonesia's land legislations do not recognize the concept of freehold land rights. Instead the various rights attached to the land are subdivided into separate titles.

The Basic Agrarian Law (Law No. 5 of 1960) recognizes type of rights on land of non-state-forest area, whereas for the state-forest area, the Law No. 5 of 1967 on forestry is applied. To foreign as well as domestic investors, the following three main rights are significant; the Land Cultivation Right (Hak Guna Usaha, abbreviated as HGU), the Right of Building on Land (Hak Guna Bangunan, abbreviated as HGB) and the Right of Use on Land (Hak Pakai, abbreviated as HP). These rights authorize the use of land in some ways, and their differences are mainly on the duration of validity, the nature of utilization, the opportunity to mortgage (to use as an asset or collateral) and proof of title:

The Land Cultivation Right (HGU) is the right to use a State Owned Land for the purposes of agriculture namely plantation, fishing, or cattle rising. By law the title is granted for a maximum period of 35 years, but can be extended to 25 years if the land is properly used and managed. This title of right is given to Indonesian individual(s) or legal entities domiciled in Indonesia including PMA companies. It can be used as collateral or transferred to other party with the government approval.

The Right of Building on Land (HGB) is the right to construct and own buildings on a piece of land that one has purchased. The title is granted for a maximum period of 30 years and can be extended for a maximum period for 20 years for Indonesian individual(s) and /or legal entities domiciled in Indonesia, including PMA companies, and can also be used as collateral or transferred to other party. This is also applicable and generally granted to tenants in industrial estates.

Right of Use on Land (HP) is the right to use land for a specific purpose and granted for a period of 25 years and can be extended for period of 20 years or as long as the land is used for a certain (normal) utilization. Now, this right can also be used as a mortgage. In addition, it can also be transferred to other party through a government approval.

Dwelling House or a Residence that can be Owned by a Foreign Person shall be:

- A separate house constructed on a piece of land with the right of utilization on state land or controlled on the basis of an agreement with a land holder; or
- An apartment constructed on a piece of land with the right of utilization on state land.

Foreign investors who obtained mining contract from the Minister of Mines and Energy or the Respective Governor / the District Head or forest exploitation rights and or plantation right from the Ministry of Agriculture or the Respective Governor/District Head could automatically use the land within their business license. In case investors want to use the land for different purposes, special applications should be submitted to the Ministry or the respective Governor / District Head concerned. These rights have no collateral value to the owner.

2.7. Relevant International Agreement

Investment Guarantee and Protection Agreement

A number of governments provide investment guarantees to other nationals who make overseas investment in their countries. In most cases, these guarantees cover compensation in case of nationalization or expropriation, damages or losses caused by incidents of war, revolution or insurrection and payments for any approved remittance pursuant to the investment in case of non-convertibility of currency of the host country. To provide security for foreign investment, the Government of Indonesia concludes Investment Guarantee Agreement (IGA) with ASEAN governments. Besides, Indonesia signed bilaterally the Investment Promotion and Protection Agreements with 55 countries, namely: Argentina, Algier, Australia, Bangladesh, Belgium / Luxembourg, Cambodia, Chile, People Republic of China, Cuba, Czech Republic, Denmark, Egypt, Finland, France, Germany, Hungary, India, Italy, Jamaica, Jordan, Democratic People's Republic of Korea, South Korea, Kyrgyzstan, People Democratic Republic of Laos, Malaysia, Morocco, Mauritius, Mongolia, Mozambique, The Netherlands, Norway, Pakistan, The Philippines, Poland, Qatar, Romania, Singapore, Slovak Republic, Spain, Sri Lanka,

Sudan, Suriname, Sweden, Switzerland, Syria, Thailand, Tunisia, Turkmenistan, Turkey, Ukraine, United Kingdom, Uzbekistan, Vietnam, Yemen and Zimbabwe.

To create a favorable international investment climate, Indonesia has also signed multilateral agreements, thereby promoting foreign direct investment in Indonesia. Indonesia is now a member of the Multilateral Investment Guarantee Agency (MIGA), which will protect investment against various political risks.

To deal with foreign investment disputes, Indonesia has become a signatory member of the International Center on the Settlement of Investment Disputes (ICSID)

Intellectual Property Right

Indonesia has made a great progress on intellectual property protection since 1986. Indonesia is a member of the World Intellectual Property Organization and is party of certain sections of the Paris Convention for the protection of Intellectual Property. Pursuant to obligations under the Agreement on Trade-Related Aspects of Intellectual Property Right (TRIPs), one of the Uruguay Round Agreements, Indonesia has amended Patent Law, Copyrights Law and Trademark Law in 1997.

Patent

Indonesia's first patent law entered into effect on August 1, 1991 but then it was replaced on August 1, 2001 by Law No.14 of 2001. The Law and its implementing regulations outline patent applications, procedures, application fees, registration of patent consultants, and patent announcements. Products and production processes are in principle patentable subject to certain requirements. The Law provides protection for a period of 20 years for Patent and 10 years for Simple Patent, both of them can not be extended.

Trademarks

The first Indonesia's trademark act took effect on April 1, 1993 but then it was replaced by Law No. 15 of August 2001. The act is intended to provide greater protection for well-known foreign and Indonesian marks, and to prohibit the use of deceptively similar marks. The act states that trademark right are determined on a first file basis rather than on a first use basis. The trademark is valid for 10 years from the date of trademark filed and it can be extended. After registration, the trademark must actually be used in commerce. The deletion of registered trademark from the general list of trademark can be undertaken either by the trademark holder initiative or the trademark office if trademark is not used within 3 years.

Copyright

In 1987 and 1997, the House of Representative - Dewan Perwakilan Rakyat (DPR) passed two amendments to the 1982 Copyright Law. The amended law affords protection to people's creations on science, art and literature, expands the scope of coverage and rises the terms of protection for most categories of works to international standards. The copyright is valid for:

- As long as the author's life until 50 years from the date of the death of author: for book, flyer, paper / write, seminar, lecture, speech, and the like, performance (music, Java traditional music / karawitan, drama, dance, people or puppet performance / pewayangan, pantomime, choreography, created song or music with or without lyric, arts (painting, statue), batiks arts, architecture, map, translation, interpret, and excerpt, writing and work of arts.
- 50 years from the date of the copyright notification: for broadcasting creation used such as on TV, radio, video, and movie, created song or music with or without lyric, recorded voice or sound, arts (painting, statue); cinematography, computer program.

- 25 years from the date of copyright notification: for photography, computer programs, and cover design.

2.8. Immigration

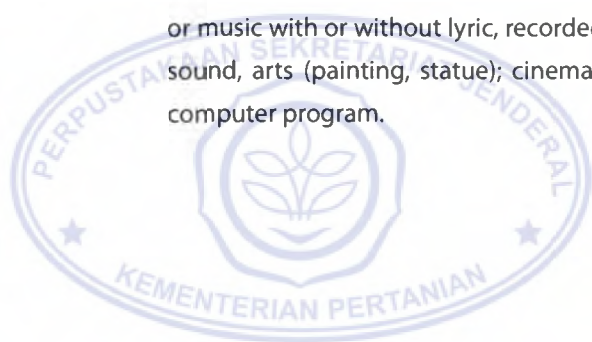
Visa and Immigration Requirements

Tourists and business visitors from Argentina, Australia, Austria, Belgium, Brazil, Brunei, Canada, Chili, Chinese Taipei, Denmark, Egypt, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Jordan, Kuwait, Luxembourg, Malaysia, Maldives, Malta, Morocco, Mexico, Monaco, Netherlands, New Zealand, Norway, The Philippines, Saudi Arabia, Singapore, South Korea, Spain, Sweden, Switzerland, Hong Kong / China, Thailand, Turkey, United Arab Emirate, United Kingdom, United State of America, Venezuela and Yugoslavia do not require visa for a maximum stay of 2 (two) months. In addition, tourists and business visitors from Honking Special Administrative Region (SAR) and the Myanmar do not require visa for a maximum stay only of 2 (two) weeks. However, these visas are unextendable. The granting of free visa to business visitors is limited for the purpose of business investigations or discussions with their business relations. They are not permitted to conclude any business transaction, engage in local employment, and perform any professional or technical service. Visa is still required for visitors from countries which are not mentioned above.

Multiple-Journey Business Visas

Multiple-Journey Business Visa travel visa gives the bearer the right to make several entries to Indonesia within a period of 12 (twelve) months and each stay be up to 2 (two) months.

For business or tourist travelers of nationalities that have obtained the two months free visa on arrival, multiple-journey business visas are not necessary for stays within those two months.



Limited Stay Visas or Temporary Resident Visas

Limited Stay Visas are valid for three months to one year and are issued exclusively to experts for the national development and to expatriates who are involved in training or other educational or scientific programs in line with the prevailing government regulations. Direct dependents can also qualify for this type of visa.

Re-entry Permit

Non-citizens with residential status in Indonesia must have valid re-entry permits to re-enter Indonesia.

2.9. Environmental Protection

- In 1990, the government established the Environmental Impact Management Agency (BAPEDAL) and then, since 2002 this agency merges into the Ministry of Environment which is responsible for the development and implementation of national policies and programs for environmental management, particularly as they relate to urban and industrial pollution and hazardous waste management.
- The Ministry of Environment oversees a decentralized enforcement system (conducting environmental assessment) through the Regional Environment Management Agency (BAPEDALDA) and regional laboratories to ensure efficient monitoring of the implementation of environmental policies.

2.10. Business Entrance

Indonesia has been stipulated the new law No: 25/2007 concerning Investment (in Indonesia), to meet the above Investment law Indonesia Government is preparing the derivatives regulations.

For the transition, few fields of business activities are regulated by Presidential Decree No. 96 of

2000 as amended by No. 118 of 2000. There are 11 (eleven) business activities closed for any investment (domestic as well as foreign / PMA) such as cultivation and processing marijuana, collection / utilization of sponges, industries of harmful chemicals and chemical weapon, which are listed in the attachment-I of the mentioned decrees. There are 8 (eight) business activities and closed for PMA companies such as germ plasma cultivation, concessions for natural forest, which are listed in the attachment-II. In addition, there are 9 (nine) business activities opened on the condition of joint venture between foreign and domestic capital, such as developing and operating of harbor, electricity production, transmission and distribution, as listed in the attachment-III. List of business activities which are opened for investment if fulfilled certain conditions is listed in the attachment-IV, such as cultivation of fish in fresh water, industries of pulp made of wood and ethyl alcohol.

2.11. The Indonesian Regulatory Environment

The Indonesian Investment Process

- The Capital Investment Board (BKPM) has the responsibility to administer and grant investment application. BKPM issues licenses for both domestic (PMDN) and Foreign investment (PMA).
- Service and/or licencing convenience may be given and renewed in advance simultaneously and may be further renewed upon request of the investors in form of:
 - a. Hak guna usaha [leasehold] may be given for 95 [ninety-five] years and simultaneously renewed in advance for 60 [sixty] years, and it may be further for 35 [thirty-five] years.
 - b. Hak guna bangunan [building rights] may be given for 80 [eighty] years, and simultaneously

renewed in advance for 50 [fifty] years, and it may be further renewed for 30[thirty] years, and

- c. Hak pakai [right of use] may be given for 70 [seventy] years and simultaneously renewed in advance for 45 [fourty-five] years, and it may be further renewed for 25 [twenty-five] years
- The government shall provide the same treatment to any investors originating from any countries making investement in Indonesia pursuant to the rules of law. Treatment set forth shall not apply to investor of certain countries that have received privilege by virtue of an agreement with Indonesia.
- one-stop intergrated service is meant to assist investor in obtaining service counveniece, fiscal facility, and information about investement. One-stop intergreted service shall be provided

by authorized institution or egency. In investement sector that have been delegated or assigned by institution of agency possessing the authority to issue licensing or non-licencing in a province or regency/city. Provisions on the method and implementation of such one-stop integrated service set forth shall be governed with presitential regulation.

- The approval process today for foreign investors is easier than before 1997.
- The professional adviser is highly recommended for any new company wishing to establish.
- There are regional BKPM offices, which are located in provinces, known as (BKPM) also have responsibility for issuing licenses and approvals.
- The new Investmant Law (row under processed) eliminates many impediments and red neck investment procedures.



III. INDONESIAN AGRICULTURE PROFILE

The role of agriculture continues to be of vital importance to the nation's growing population. It is an important source of labor absorption, 42 million people in 2005. It is also an important source of foreign capital through estate crops such as palm oil, rubber and coffee and is an increasingly important supplier of raw and semi-processed input to the domestic manufacturing industry. Currently, agriculture accounts for over 10.48 % of Indonesia's GDP and employs 40 % of the total workforce.

3.1. Land Size, Structure & Utilization

In the year 2004 land usage in Indonesia reach 78.027.829 Ha. Land usage for the agricultural sector the biggest is at plantation effort. The percentage of land usage can be grouped as follow: Rice field / wetland 10 %, dry land/ garden land 14 %, Shifting Cultivation 5 %, Temporary Fallow land 16 %, estate 25 %, and others 30 %.

3.2. Area and Production

Clove

Area and Production by Category of Producers Year 2003 – 2007*)

Year	Area (Ha)				Production(Ton)			
	Smallholders	Government	Private	Total	Smallholders	Government	Private	Total
2003	433.885	1.865	6.583	442.333	74.518	354	1.599	76.471
2004	429.728	1.865	6.660	438.253	71.794	355	6.660	78.809
2005	438.771	1.865	8.221	448.857	76.201	372	8.221	84.794
2006	436.091	2.572	6.702	445.365	60.271	310	941	61.523
2007*)	434.760	2.629	6.842	444.231	62.554	316	960	63.831

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Tea

Area and Production by Category of Producers Year 2003 – 2007*)

Year	Area (Ha)				Production(Ton)			
	Smallholders	Government	Private	Total	Smallholders	Government	Private	Total
2003	64.742	41.988	36.874	143.604	47.079	82.082	40.660	169.821
2004	61.902	44.768	35.878	142.548	40.200	89.303	36.448	165.951
2005	60.771	44.066	34.284	139.121	37.746	89.959	38.386	166.091
2006	60.990	46.661	27.939	135.590	37.355	81.847	27.657	146.858
2007*)	61.735	42.747	28.049	132.533	40.929	68.666	27.653	137.248

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Pepper

Area and Production by Category of Producers Year 2003 – 2007*)

Year	Area (Ha)				Production(Ton)			
	Smallholders	Government	Private	Total	Smallholders	Government	Private	Total
2003	204.128	0	236	204.364	90.644	0	96	90.740
2004	201.248	0	236	201.484	76.959	0	49	77.008
2005	191.801	0	191	191.992	78.272	0	56	78.328
2006		0	32			0	12	
2007*)	199.189	0	33	199.222	77.277	0	18	77.295

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Rubber

Area and Production by Category of Producers Year 2003 – 2007*)

Year	Area (Ha)				Production(Ton)			
	Smallholders	Government	Private	Total	Smallholders	Government	Private	Total
2003	2.772.490	241.625	275.997	3.290.112	1.396.244	191.699	204.405	1.792.348
2004	2.747.899	239.118	275.250	3.262.267	1.662.016	196.088	207.713	2.065.817
2005	2.767.021	237.612	274.758	3.279.391	1.838.670	209.837	222.384	2.270.891
2006	2.832.982	238.003	275.442	3.346.427	2.082.597	265.813	288.821	2.637.231
2007*)	2.899.679	238.246	275.792	3.413.717	2.186.209	277.200	301.285	2.764.695

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Coffee

Area and Production by Category of Producers Year 2003 – 2007*)

Year	Area (Ha)				Production(Ton)			
	Smallholders	Government	Private	Total	Smallholders	Government	Private	Total
2003	1.240.222	26.597	25.091	1.291.910	644.657	17.007	9.591	671.255
2004	1.251.326	26.597	26.020	1.303.943	618.227	17.025	12.134	647.386
2005	1.202.392	26.641	26.239	1.255.272	615.556	17.034	7.775	640.365
2006	1.255.104	26.644	26.983	1.308.732	653.261	17.017	11.880	682.158
2007*)	1.258.397	26.644	26.989	1.312.030	656.964	17.019	12.780	686.763

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary



Cocoa

Area and Production Year 2003 – 2006*)

Year	Area (Ha)	Production(Ton)
2003	959.007	697.166
2004	1.090.960	691.704
2005	1.167.046	748.828
2006*)	1.191.742	779.473

Sources: 1. Bureau of Central Statistics, Indonesia
2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Coconut

Area and Production Year 2003 – 2006*)

Year	Area (Ha)	Production(Ton)
2003	3.913.130	3.254.854
2004	3.797.004	3.054.514
2005	3.803.613	3.096.846
2006*)	3.817.798	3.156.875

Sources: 1. Bureau of Central Statistics, Indonesia
2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

Palm Oil

Area and Production Year 2002 – 2006*)

Year	Area (Ha)	Production(Ton)
2003	5.283.557	10.440.834
2004	5.284.723	10.830.389
2005	5.453.816	11.861.615
2006*)	6.074.926	13.390.807

Sources: 1. Bureau of Central Statistics, Indonesia
2. Ministry of Agriculture, Republic of Indonesia

Note: *) Preliminary

3.3. Export and Import

Food Crops

Table 1. Export Volume of Food Crops, 2003-2007

(Ton)

Commodity	Year				
	2003	2004	2005	2006	2007
Paddy					
▪ Fresh	676	904	42,186	959	1,266
▪ Processed	559	3,588	2,055	218	2,974
Maize					
▪ Fresh	33,691	32,679	32,849	28,074	6,169
▪ Processed	481	18,800	6,614	1,091	1,021
Peanut					
▪ Fresh	8,633	8,118	2,860	2,520	3,834
▪ Processed	10,455	1,932	2,075	9,273	1,722
Soybean					
▪ Fresh	169	1,300	307	1,732	345
▪ Processed	13,455	17,080	4,610	7,057	21,382
Cassava					
▪ Fresh	21,999	234,169	55,861	132,005	208,722
▪ Processed	6,627	214,427	70,656	7,091	36,196
Other	597,473	637,249	370,859	671,198	680,622
Total	694,217	1,170,247	590,931	861,219	964,253

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table2. Export Value of Food Crops, 2003 – 2007

(000 USD)

Commodity	Year				
	2003	2004	2005	2006	2007
Paddy					
▪ Fresh	319	456	8,587	531	258
▪ Processed	401	1,006	342	94	648
Maize					
▪ Fresh	5,517	9,074	6,108	4,306	943
▪ Processed	233	4,672	1,975	369	175
Peanut					
▪ Fresh	4,462	5,352	1,846	2,579	2,943
▪ Processed	4,692	2,303	1,785	8,164	2,773
Soybean					
▪ Fresh	300	501	214	2,891	361
▪ Processed	6,003	6,202	2,939	5,515	31,688
Cassava					
▪ Fresh	2,003	20,400	5,546	14,836	31,146
▪ Processed	1,352	36,946	12,581	1,847	12,280
Other	137,287	187,584	117,402	223,032	231,089
Total	162,570	274,497	159,325	264,165	303,252

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table 3. Import Volume of Food Crops, 2003 – 2007**(Ton)**

Commodity	Year				
	2003	2004	2005	2006	2007
Paddy					
• Fresh	1,428,506	236,867	73,622	438,109	481,892
• Processed	9,251	9,390	3,659	1,673	212
Maize					
• Fresh	1,345,446	1,088,928	58,326	1,775,321	342,268
• Processed	25,680	26,166	37,797	67,636	72,056
Peanut					
• Fresh	120,264	90,016	80,938	169,111	116,985
• Processed	7,269	69,764	3,430	10,534	4,244
Soybean					
• Fresh	1,192,717	1,115,793	657,734	1,132,144	1,411,589
• Processed	1,580,951	1,765,943	1,159,808	2,147,114	2,349,504
Cassava					
• Fresh	2,136	1,812	48	39	45
• Processed	188,943	56,269	20,070	305,204	306,343
Other	4,118,883	5,209,659	3,057,821	5,409,625	4,811,288
Total	10,020.046	9,670,607	5,153,253	11.456,510	9,896.426

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table 4. Import Value of Food Crops, 2003 – 2006**(000 USD)**

Commodities	Year				
	2003	2004	2005	2006	2007
Paddy					
• Rice	291,423	61,753	20,575	132,621	157,612
• Processed	3,187	3,195	1,484	1,285	111
Maize					
• Fresh	168,658	177,675	11,994	277,498	69,733
• Processed	8,573	11,464	11,616	21,615	23,801
Peanut					
• Fresh	40,539	28,875	26,126	54,161	44,790
• Processed	2,609	16,833	2,212	5,366	3,483
Soybean					
• Fresh	330,497	416,930	192,087	299,578	479,428
• Processed	376,257	551,027	301,126	509,477	721,522
Cassava					
• Fresh	481	398	59	47	50
• Processed	33,083	10,048	4,634	70,237	77,773
Other	812,786	1,145,220	677,278	1,196,569	1,400,098
Total	2.068.092	2.423.418	1.249.191	2.568.453	2.938.090

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Horticulture

Table 5. Export Volume of Horticulture Commodities, 2004 – 2007

Commodities	Volume (Ton)				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Flowers and Ornamental Plant :	14,065	16,909	13,994	3,015	-78.45
- Orchid	426	525	363	191	-47.39
- Non Orchid	13,639	16,383	13,631	2,825	-79.28
Fresh Vegetables:	88,545	97,176	179,938	91,303	-49.26
- Shallots	4,637	4,259	15,701	1	-99.99
- Potatoes	16,488	13,820	85,994	9,661	-88.77
- Chili	854	87	15	-	-
- Others Vegetables	41,070	46,971	43,853	58,152	32.61
- Others	25,496	32,039	34,375	23,488	-31.67
Processed Vegetables:					
- Shallots	18,948	22,956	28,893	27,160	-6.00
- Potatoes	-	-	-	-	-
- Chili	196	369	276	61	-78.04
- Other Vegetables	-	-	102	-	-
- Others	3,186	884	3,265	16,989	420.26
	15,567	21,703	25,249	10,110	-59.96
Fresh Fruits	168,502	237,431	227,862	27,205	-88.06
- Mango	1,880	941	1,182	1,198	1.38
- Citrus	1,743	4,434	465	357	-23.16
- Banana	1,197	3,647	4,443	9	-99.79
- Durian	-	-	-	-	-
- Mangosteen	3,045	8,471	5,698	9,093	59.59
- Others Fruits	142,015	199,081	187,254	2,974	-98.41
- Others	18,622	20,857	28,821	155	-99.46
Processed Fruits	3,320	1,253	1,369	94,579	6.80
- Mango	-	-	-	622,27	-
- Citrus	41	36	1	1,85	64.71
- Banana	-	-	-	-	-
- Durian	-	-	-	-	-
- Mangosteen	-	-	-	-	-
- Others Fruits	-	-	-	-	-
- Others	3,279	1,218	1,368	93,955	-100.00
Various Crops	3,098	8,590	4,832	2,695	-44.24
Total	296,479	384,316	456,890	245,957	-46.17

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia



Table 6. Export Value of Horticulture Commodities, 2003 – 2007

Commodities	Value (000 US\$)				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Flowers & Ornamental	12.914	12.905	13.559	4.414	-67,44
Plant :	1.326	1.431	1.232	920	-25,34
- Orchid	11,588	11,474	12,327	3,494	-71.65
- Non Orchid					
Fresh Vegetables :	32,304	38,495	47,495	34,211	-28,07
- Shallots	1,889	1,520	6,366	2	-99.96
- Potatoes	3,556	3,576	5,952	12,275	106,24
- Chili	453	42	4	-	-100.00
- Others Vegetables	7,562	15,805	12,013	2,587	-78.47
- Others	18,843	17,552	23,226	14,022	-39.63
Processed Vegetables :	28,677	45,666	51,334	55,657	8.42
- Shallots	-	-	-	-	-
- Potatoes	122	252	230	70	-69.34
- Chili	-	-	76	-	-100.00
- Vegetables Others	2,590	1,174	1,060	28,218	2,562.27
- Others	25,965	44,239	49,968	27,369	-45.23
Fresh Fruits	97,705	124,268	119,221	15,039	-87.39
- Mango	2,013	996	1,161	1,004	-13.48
- Citrus	1,544	442	314	141	-54.96
- Banana	778	1,289	1,408	36	-97.47
- Durian	-	-	-	-	-
- Mangosteen	3,292	6,385	3,612	4,951	37.08
- Others Fruits	79,727	105,291	100,831	2,548	-97.47
- Others	10,727	9,865	11,896	193	-98.38
Processed Fruits	2.458	812	4.287	61.519	1,334.95
- Mango	-	-	-	867	-
- Citrus	106	812	5	10	102.00
- Banana	-	-	-	-	-
- Durian	-	-	-	-	-
- Mangosteen	-	-	-	-	-
- Others Fruits	-	-	2,795	-	-
- Others	2,352	-	1,487	60,643	3,977.50
Various Crops	3.030	5.120	4.896	4.065	-16.97
Total	117.090	227.266	240.858	174.906	-27.38

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table 7. Import Volume of Horticulture Commodities, 2004 – 2007

Commodities	Volume (Ton)				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Flowers and Ornamental	807	990	1,064	1,115	4.81
Plant:	139	122	71	3	-95.39
- Orchid	668	867	993	1,111	11.96
- Non Orchid					
Fresh Vegetables :	341,670	437,055	421,117	101,615	-75.87
- Shallots	48,927	53,071	78,462	17,655	-77.50
- Potatoes	3,831	6,391	85,994	6,952	-91.92
- Chili	-	97	111	-	-
- Others Vegetables	249,126	347,306	19,862	50,822	155.88
- Others	39,786	30,189	236,689	19,599	-91.72
Processed Vegetables :	100,275	48,200	51,062	138,535	171.31
- Shallots	-	-	-	-	-
- Potatoes	18,805	22,961	12,751	21,995	72.50
- Chili	52,819	1,117	339	-	-
- Others Vegetables	8,149	6,658	9,655	7,610	-21.18 284.68
- Others	20,502	17,463	28,317	108,930	
Fresh Fruits:	351,491	366,459	376,325	311,761	-17.16
- Mango	753	869	966	1,088	12.62
- Citrus	95,221	84,015	95,613	33,375	-65.09
- Banana	409	444	124	9	-92.88
- Durian	-	-	-	21,828	-
- Mangosteen	295	1	-	14	-
- Others Fruits	3,477	1,270	1,165	251,589	21,494.70
- Others	251.337	279.860	278.456	1.486	-99.47
Processed Fruits:	4,275	3,338	73,685	5,111	-93.06
- Mango	-	-	-	175	-
- Citrus	508	706	466	825	77.07
- Banana	-	-	-	-	-
- Durian	-	-	-	-	-
- Mangosteen	-	-	-	-	-
- Others Fruits	2,041	-	70,423	-	-
- Others	1,726	2,632	2,795	4,110	47.05
Various Crops	312	300	616	521	-15.43
Total	798,830	856,341	923,867	558,657	-39.53

Source: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table 8. Import Value of Horticulture Commodities, 2004 – 2007

Commodities	Value (000 US\$)				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Flowers and Ornamental Plant:	1.186	1.791	1.526	1.318	-13.65
- Orchid	350	538	335	40	-87.98
- Non Orchid	836	1.254	1.192	1.278	7.24
Fresh Vegetables :	84.687	130.739	157.275	60.243	-61.70
- Shallots	14.240	15.412	30.106	7.046	-76.59
- Potatoes	1.672	3.258	3.074	3.711	20.74
- Chili	-	66	67	-	-100.00
- Others Vegetables	55.549	71.495	13.135	18.417	40.21
- Others	13.226	40.508	110.894	28.194	-74.58
Processed Vegetables :	72.186	43.821	60.456	64.437	6.58
- Shallots	-	-	-	-	-
- Potatoes	13.670	16.292	17.390	18.934	8.88
- Chili	29.826	591	188	-	-100.00
- Vegetables Others	7.235	4.442	6.328	6.365	0.59
- Others	21.455	22.495	36.551	39.138	7.08
Fresh Fruits	182.83-	185.779	282.211	247,418	-12.33
- Mango	446	437	627	725	15.66
- Citrus	51.220	40.537	67.376	25,417	-62.28
- Banana	189	401	168	4	-97.58
- Durian	-	-	-	27,026	-
- Mangosteen	-	-	-	14	-
- Others Fruits	1.210	900	7.303	191,525	2,522.44
- Others	129.766	143.503	206.736	1,148	-99.44
Processed Fruits	3.573	4.783	25.169	7,818	-68.96
- Mango	-	-	-	189	-
- Citrus	602	829,967	649	1,297	99.90
- Banana	-	-	-	-	-
- Durian	-	-	-	-	-
- Mangosteen	-	-	-	-	-
- Others Fruits	-	-	7.303	-	-100,00
- Others	2.971	3.953	17.215	6.325	-63,26
Various Crops	330	511	778	472	-39,37
Total	344.791	367.425	527.415	381.700	-27,63

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Estate Crops

Table 9. Export of Clove, Coconut, Coffee and Latex 2003 – 2007

Year	Clove		Coconut		Coffee		Latex	
	Volume (Ton)	Value (000 US\$)	Volume (Ton)	Value (000 US\$)	Volume (Ton)	Value (000 US\$)	Volume (Ton)	Value (000 US\$)
2003	15,688	24,929	466,146	192,976	323.904	259.107	1,661	1,485
2004	3,060	10,761	546,676	304,374	344.077	294.114	1,874	2,180
2005	9,683	14,916	920,061	488,034	247.183	277.312	2,024	2,582
2006	11,270	23,533	n.a	n.a	414.105	588.502	n.a	n.a
2007	n.a	n.a	n.a	n.a	320.850	635.067	n.a	n.a

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Table 10. Export of Tea during 2000 - 2005

Year	Volume (Ton)	Value (000 US\$)
2000	105,581	112,106
2001	99,797	99,965
2002	100,185	103,426
2003	88,176	116,220
2004	98,572	121,496
2005	102,294	n.a

Sources: 1. Bureau of Central Statistics, Indonesia
2. Ministry of Agriculture, Republic of Indonesia



Livestock

Table 11. Import Value of Livestock Commodities , 2004 – 2007

(000 US\$)

Commodities	Year				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Livestock	100,294	69,365	117,263	227,377	93.90
Cattle Breed	2,292	989	2,545	15	-99.41
Feeder Steer	89,082	62,498	108,597	217,720	100.49
Horse	-	7	39	-	-100.00
Goat Breed	2	1	5	278	5,096.10
Pig Breed	-	-	-	-	-
Feeder Pig	-	-	-	-	-
DOC	8,504	5,638	5,779	9,052	56.63
Duck and Goose	125	175	103	47	-54.23
Various Livestock	-	-	-	-	-
Other	289	57	195	265	36.03

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 12. Import Value of Livestock Products Commodities, 2004 – 2007

(000 US\$)

Commodities	Year				Growth 2007 Over 2006 (%)
	2004	2005	2006	2007	
Livestock Products	835,881	590,344	1,073,132	750,089	-30.10
Beef	27,545	25,511	49,077	92,847	89.18
Horse Meat	-	-	-	25	-
Mutton Meat	2,013	1,840	2,062	2,408	16.82
Pork	194	119	268	444	65.49
Other Pork	3,654	1,450	1,795	2,676	49.09
Chicken Meat	775	3,285	4,430	6,805	53.63
Poultry Egg	347	362	830	758	-8.58
Processed Egg	1,959	1,044	2,323	3,853	65.85
Leather	1,302	1,126	1,468	1,580	7.63
Processed Leather	2	38,232	69,390	76,391	10.09
Bone & Horn	153	75	17	7	-59.78

Poultry Feather	902	1,044	1,656	382	-76.92
Milk & Milk Products	329,383	229,628	416,183	166,617	-59.97
Butter	73,687	52,183	113,230	99,883	-11.79
Cheese	27,593	15,740	30,733	20,258	-34.09
Others	366,374	218,705	379,670	275,154	-27.53

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 13. Import Volume of Livestock Commodities, 2004 – 2007 (Ton)

Commodities	Year				Growth 2007 Over 2006 (%)
	2004	2005	2006	2007	
Livestock	84,155	51,376	95,260	145,452	52.69
Cattle Breed	1,459	953	2,172	50	-97.72
Feeder Steer	82,538	50,294	92,999	144,967	55.88
Horse	-	1	6	-	-100.00
Goat Breed	-	-	5	213	3,927.76
Pig Breed	-	-	-	-	-
Feeder Pig	-	-	-	-	-
DOC	36	32	23	43	90.49
Duck and Goose	55	53	55	33	-40.32
Various Livestock	-	-	-	-	-
Other	67	42	-	146	-

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 14. Import Volume of Livestock Product Commodities, 2004 – 2007 (Ton)

Commodities	Year				Growth 2007 Over 2006 (%)
	2004	2005	2006	2007	
Livestock Product	789,464	499,477	785,035	339,956	-56.70
Beef	12,974	12,755	25,949	41,043	58.17
Horse Meat	-	-	-	13	-
Mutton Meat	520	520	712	571	-19.79
Pork	154	88	248	298	19.95

Commodities	Year				Growth 2007 Over 2006 (%)
	2004	2005	2006	2007	
Other Pork	4,896	1,816	1,225	2,312	88.69
Chicken Meat	1,194	3,690	3,331	4,535	36.12
Poultry Egg	220	118	76	55	-27.64
Processed Egg	675	310	895	1,157	29.30
Leather	1,293	1,299	3,487	3,044	-12.71
Processed Leather	-	4	9	7	-16.54
Bone and Horn	154	63	2,490	1,113	-55.30
Poultry Feather	326	290	603	487	-19.15
Milk and Milk Product	165,411	102,769	188,128	74,382	-60.46
Butter	59,100	34,661	73,420	38,900	-47.02
Cheese	11,303	5,672	10,612	5,759	-45.73
Others	531,244	331,183	467,217	159,781	-65.80
Total Livestock & Livestock Product	873,619	550,853	880,295	485,407	-44.86

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 15. Export Value of Livestock Commodities, 2004 - 2007

(000 US\$)

Commodities	Year				Growth 2007 over 2006 (%)
	2004	2005	2006	2007	
Livestock	20,611	17,129	15,765	37,747	139.42
Cattle Breed	-	-	1	6	441.64
Feeder Steer	4		4	171	4,394.23
Horse	-	5	6	1,541	25,579.28
Goat Breed	105	136	1,442	1,788	24.00
Pig Breed	1	-	-	98	20,815.38
Feeder Pig	20,415	16,958	14,312	34,141	138.54
DOC	3	-	-	-	-
Duck and Goose	-	22	-	-	-
Various Livestock	-	-	-	-	-
Others	83	8	-	2	-

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and Data Processing since 2003

Table 16. Export Value of Livestock Product, 2004 - 2007**(000 US\$)**

Commodities	Year				Growth 2007 over 2006 (%) °
	2004	2005	2006	2007	
Livestock Product	307,924	221,596	373,173	320,251	-14.18
Beef	127	102	24	36	53.96
Horse Meat	81	-	3	24	731.50
Mutton Meat	12	22	-	-	-
Pork	1,346	25	209	45	-78.31
Other Pork	2,826	3,531	775	347	-55.18
Chicken Meat	161	18	43	16	-62.00
Poultry Egg	212	3	99	-	-100.00
Processed Egg	111	58	-	-	-
Leather	69	438	430	517	20.38
Processed Leather	45	49,929	132,839	58,189	-56.20
Bone and Horn	440	147	1,286	1,113	-13.46
Poultry Feather	626	500	1,346	728	-45.95
Milk and Milk Product	61,605	59,693	71,542	28,371	-60.34
Butter	5,100	1,962	5,388	6,096	13.15
Cheese	1,165	475	1,805	1,267	-29.78
Others	233,998	104,693	157,386	223,502	42.01

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 17. Export Volume of Livestock Commodities, 2004 – 2007**(Ton)**

Commodity	Year				Growth 2007 over 2006 (%) °
	2004	2005	2006	2007	
Livestock	20,246	14,664	12,623	25,521	102.23
Cattle Breed	-	-	3	13	289.34
Feeder Steer	1	-	4	82	1,935.66
Horse	-	4	2	324	16,534.41
Goat Breed	106	125	756	833	10.16
Pig Breed	-	-	-	71	-
Feeder Pig	20,119	14,455	11,855	24,198	104.12
DOC	-	-	-	-	-

Commodity	Year				Growth
	2004	2005	2006	2007	2007 over 2006 (%)
Duck and Goose	-	20	-	-	-
Various Livestock	-	-	-	-	-
Others	20	60	-	-	-

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

Table 18. Export Volume of Livestock Product Commodities, 2004 – 2007 (Ton)

Commodities	Year				Growth
	2004	2005	2006	2007	2007 over 2006 (%)
Livestock Product	201,417	137,349	185,786	202,691	9.10
Beef	20	69	14	52	275.36
Horse Meat	33	-	1	4	162.29
Mutton Meat	-	1	-	1	-
Pork	2,756	40	97	16	-83.16
Other Pork	3,789	5,340	1,680	407	-75.78
Chicken Meat	101	-	25	-	-99.89
Poultry Egg	128	3	12	-	-100.00
Processed Egg	143	550	-	-	-
Leather	10	60	42	33	-21.72
Processed Leather	40	6,680	9,468	3,582	-62.16
Bone and Horn	393	148	383	542	41.46
Poultry Feather	827	682	1,159	812	-29.89
Milk and Milk Product	40,935	29,304	35,241	15,775	-55.24
Butter	5,259	2,342	6,494	5,601	-13.75
Cheese	251	145	546	421	-22.88
Others	146,732	91,985	130,624	175,445	34.31

Sources: 1. Bureau of Central Statistics, Indonesia 2. Ministry of Agriculture, Republic of Indonesia

Note: Change of Harmonize System (HS) Code and data processing since 2003

IV. INVESTMENT AND TRADE OPPORTUNITY OF INDONESIA

4.1. Investment and Trade Opportunities by Province

No.	Provinces	Type of Business	Location
1.	Nangroe Aceh Darussalam	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Soybean Horticulture: Chili, Fruits: Durian, Banana Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Clove Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> Pidie, Bireun, North Aceh Pidie, Bireun, North Aceh, West Aceh Aceh Singkil, Aceh Tamiang, East Aceh, South Aceh, Aceh Besar, Pidie South Aceh, Aceh Besar, Pidie, North Aceh
2.	North Sumatra	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Cassava, Peanut Horticulture: Vegetables, Potato, Chili, Shallots Fruits: Rambutan, Durian, Banana, Orange Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Clove Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> Deli Serdang, South Tapanuli, Simalungun, North Tapanuli, Karo, Dairi, Langkat. Karo, Binjai, Deli Serdang, Langkat Simalungun. Karo, Binjai, Deli Serdang, Langkat Simalungun. South Tapanuli North Tapanuli, Simalungun, Dairi, Deli Serdang, Langkat. South Tapanuli. Asahan, Deli Serdang, Langkat
3.	West Sumatra	<ul style="list-style-type: none"> Food Crops: Paddy, Corn Horticulture: Potato, Chili, Shallots Cabbage, Asparagus and Broccoli Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Clove, Arabica Coffee, Coconut Livestock: Beef Cattle 	<ul style="list-style-type: none"> Solok, Pesisir Selatan, Agam, Padang/Pariaman, Tanah Datar, Pasaman, 50 Kota Solok, Agam, Tanah Datar Padang Pariaman, Solok, Agam, Tanah Datar, Sawah Lunto, 50 Kota Solok, Agam, Tanah Datar, Pesisir Selatan, Sawahlunto
4.	South Sumatra	<ul style="list-style-type: none"> Horticulture: Pineapple, Banana, Vegetables, Duku Estate Crops: Palm Oil, Rubber, Livestock: Cow, Buffalo, Goat, Chicken 	<ul style="list-style-type: none"> Muara Enim, OKU, MUBA, P. Alam, Lahat OKU, OKI, MUBA, M. Enim OKU, OKI, MLBA, M. Enim, Palembang, Ogan Ilir



5.	Riau	<ul style="list-style-type: none"> Food Crops: Paddy, Corn Horticulture: Fruits: Durian, Banana, Orange Estate Crops: Palm Oil, Rubber, Cocout, Rubber Livestock: Beef, Cattle, Goat, Chicken 	<ul style="list-style-type: none"> Kampar, Indragiri Hulu, Indragiri Hilir, Bengkalis Kampar, Indragiri Hulu, Indragiri Hilir, Bengkalis Dumai, Indragiri Ilir, Rokan Hulu, Indragiri Hulu, Bengkalis, Kuantan Singgigi, Bengkalis
6.	Bangka Belitung	<ul style="list-style-type: none"> Food Crops: Paddy, Corn Horticulture: Orange, Banana, Chili, Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Clove Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> Sungai Liat, Merawang, West Mendo, Belinyu Sungai Liat, Merawang, West Mendo, Belinyu Bakam, West Mendo Sungai Liat, Merawang, West Mendo, Belinyu, Bakam
7.	Kepulauan Riau	<ul style="list-style-type: none"> Estate Crops: Palm Oil, Coconut, Rubber 	<ul style="list-style-type: none"> Kepulauan Karimun, Natuna
8.	Bengkulu	<ul style="list-style-type: none"> Food Crops: Paddy, Corn Horticulture: Tomato, Vegetables Fruits: Orange, Mangosteen, Mango, Durian, Estate Crops: Palm Oil, Rubber, Coffee Livestock: Laying Pullet, Purebred Chicken, Duck, Cow 	<ul style="list-style-type: none"> Bengkulu City, South Bengkulu. Bengkulu City, South Bengkulu. Bengkulu City, South Bengkulu, North Bengkulu Bengkulu City, South - Bengkulu, North Bengkulu Rejang Lebong
9.	Jambi	<ul style="list-style-type: none"> Food Crops: Paddy, Maize Horticulture: Pineapple, Potatoes, Durian, Lanzon Estate Crops: Palm Oil, Rubber, Cassiavera Livestock: Cow, Duck, Goat 	<ul style="list-style-type: none"> East Tanjab, Merangin, Muara Bungo, Kerinci Sorolangun, Tanjab Timur, Kerinci, Merangin, Muaro, Tebo. Kerinci, Merangin, Muaro, Tebo Kerinci, Merangin, Muaro, Tebo, Tanjung Jabung
10.	Lampung	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Cassava Horticulture: Fruits: Durian, Banana, Orange Estate Crops: Palm Oil, Rubber, Coffee, Cocoa, Pepper Livestock: Broiler, Chicken, Duck, Broiler, Cow, Goat. 	<ul style="list-style-type: none"> Lampung, Tulang Bawang, North Lampung South Lamung, Central Lampung, Tulang Bawang, North Lampung Central Lampung, North Lampung, Tanggamus, South Lampung Central Lampung, North Lampung, Tanggamus, South Lampung

11.	Jakarta Capital City	<ul style="list-style-type: none"> • Horticulture: Fruits and Vegetables, Flower, Medicinal Plant • Livestock: Poultry Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> • South Jakarta, East Jakarta, West Jakarta, Centre Jakarta. • South Jakarta, East Jakarta, West Jakarta, Centre Jakarta.
12.	Banten	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn • Horticulture: Banana, Mangosteen • Estate Crops: Palm Oil, Rubber, Cocoa • Livestock: Beef Cattle, Buffalo, Goat 	<ul style="list-style-type: none"> • Lebak, Pandeglang, Serang • Lebak, Pandeglang, Serang • Lebak, Pandeglang, Serang • Lebak, Serang, Pandeglang
13.	West Java	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Soybean • Horticulture: Chili, Fruits: Durian, Banana, Pineapple, Mango, Mangosteen, Vegetables • Estate Crops: Tea, Rubber, Sugarcane • Livestock: Dairy Cow, Chicken, Sheep 	<ul style="list-style-type: none"> • Karawang, Indramayu, Subang • Sukabumi, Bandung, Garut, Cianjur, Sumedang, Purwakarta, Indramayu • Hill area regencies, Bandung • Sukabumi, Bandung, Garut, Cianjur, Sumedang, Purwakarta, Indramayu
14.	East Java	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Soybean • Horticulture: Chili, Fruits: Durian, Banana • Estate Crops: Palm Oil, Rubber, Coffee, Cocoa, Tabasco, Sugarcane • Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> • Jember, Banyuwangi, Lamongan, Tuban, Pasuruan, Lamongan • Tuban, Ponorogo, Lamongan, Lumajang, Blitar • Banyuwangi, Malang, Blitar, Bondowoso, Pacitan • Lumajang, Blitar, Banyuwangi, Malang, Bondowoso, Kediri, Mojokerto
15.	Central Java	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Soybean, Cassava • Horticulture: Chili, Potatoes, Fruits: Mango, Durian, Banana • Estate Crops: Clove, Tea • Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> • Cilacap, Grobogan, Demak, Magelang, Kebumen, Banyumas • Rembang, Brebes, Pati, Blora, Jepara, Cilacap, Wonogiri • Banyumas, Rembang, Brebes, Pati, Blora, Jepara, Cilacap, Semarang, Kebumen.



16.	Special Area of Yogyakarta	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Soybean Horticulture: Chili, Carrot Fruits: Melon, Salacca, Banana Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> Sleman, Bantul, Kulon Progo, Gunung Kidul Sleman, Bantul, Kulon Progo, Gunung Kidul Sleman, Bantul, Kulon Progo, Gunung Kidul
17.	Central Kalimantan	<ul style="list-style-type: none"> Food Crops: Paddy, Soybean, Peanut, Mungbean Horticulture: Rambutan, Banana, Salacca, Eggplant, Cucumber, Vignette, Chili, Fruits: Banana Estate Crops: Palm Oil, Rubber, Cocoa, Coconut Livestock: Beef Cattle, Buffalos, Goat 	<ul style="list-style-type: none"> Kapuas, Basarangm Kutawaringin, Sukamara Pulau Pisau, Kapuas, BarutKuta Waringin Barat, Palangkaraya, Kapuas, Murung Raya West Kota Waringin, Kamandanu, Palangkaraya, Murung Raya East Kota Waringin, Seruyan, Dulang Pisau
18.	East Kalimantan	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Soybean, Peanut Horticulture: Chili, Fruits: Banana, A Bread Tree, Orange, Jackfruit Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Pepper Livestock: Deer Bread, Buffalos, Beef Cattle, Goat 	<ul style="list-style-type: none"> Tenggarong, Kutai Kertanegara, Babulu, Sebatik Island, Talisayan, Malinau Pasir, Kutai, Bulungan, Berau, Nunukan. Pasir, Kutai, Bulungan, Berau, Nunukan.
19.	West Kalimantan	<ul style="list-style-type: none"> Horticulture: Aloe Vera, Fruits: Orange, Durian Estate Crops: Palm Oil, Rubber, Coffee, Cocoa Livestock: Cattle, Goat, Pig 	<ul style="list-style-type: none"> Sambas, Bengkayang, Ketapang, Pontianak, Sanggau, Sintang, Kapuas Hulu Sambas, Bengkayang, Ketapang, Pontianak, Sanggau, Landak, Kapuas Hulu, Ketapang, Sintang, Pontianak, Landak
20.	South Kalimantan	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Soybean Horticulture: Chili, Fruits: Orange, Banana Estate Crops: Palm Oil, Rubber, Coffee Livestock: Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> Banjarmasin, Banjar, Hulu Sungai Selatan, Tapin Hulu Sungai Tengah Banjarmasin, Banjar, Hulu Sungai Selatan, Tapin Hulu Sungai Tengah Banjarmasin, Banjar, Hulu Sungai Selatan, Tapin Hulu Sungai Tengah



21.	Bali	<ul style="list-style-type: none"> • Estate Crops: Arabica Coffee, Clove, Cashewnut • Livestock: Native Chicken, Duck, Broiler, Cow, Goat 	<ul style="list-style-type: none"> • Buleleng, Banli, Karangasem, Jembrana • Jembrana, Karangasem, Buleleng, Gianyar
22.	East Nusa Tenggara	<ul style="list-style-type: none"> • Food Crops: Corn, Sweetpotato, Cassava • Horticulture: Banana, Orange • Estate Crops: Coffee, Cocoa, Cashew Nut, Ostrich • Livestock: Beef Cattle 	<ul style="list-style-type: none"> • Belu, West Sumba, Sikka • East Lombok, Ende, Kapet Mbay, East Timor Tengah • Manggarai, Ngada, Kapet Mbay, east Sumba, North Timor Tengah. • Manggarai, Kupang, Alor, East Flores
23.	West Nusa Tenggara	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Soybean • Horticulture: Chili, Shallot, Fruits: Mango, Banana • Estate Crops: Coffee, Coconut, Cashew Nut • Livestock: Beef Cattle, Buffalo 	<ul style="list-style-type: none"> • Central Lombok, Sumbawa, Labangka, Dompu, Bima • Central Lombok, Sumbawa, East Lombok • Mataram Central Lombok, Sumbawa • Mataram Central Lombok, Sumbawa
24.	South Sulawesi	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Soybean, Cassava • Horticulture: Marquise • Estate Crops: Cocoa, Arabica Coffee, Murbei • Livestock: Beef Cattle, Buffalo, Pig 	<ul style="list-style-type: none"> • Bone, Wajo, Pinrang, Bulukumba, Bantaeng, Soppeng, Gowa, Jeneponto • Gowa, mamasa, Tana Toraja • Makassar, Bone, Enrekang, Toraja • Bone, Gowa, tator, Luwu Timur, Pinrang, Maros, Takalar
25.	North Sulawesi	<ul style="list-style-type: none"> • Food Crops: Paddy, Corn, Cassava • Estate Crops: Coffee, Cocoa, Clove • Livestock: Native Chicken, Duck, Broiler, Beef Cattle, Pig 	<ul style="list-style-type: none"> • Minahasa, Bolang Mangandow, • Minahasa, Bolang Mangandow, Talaud • Minahasa, Bolang Mangandow, Talaud
26.	West Sulawesi	<ul style="list-style-type: none"> • Food Crops: Paddy, Maize, Soybean • Horticulture: Mangosteen, Orange, Banana • Estate Crops: Palm Oil, Arabica Coffee, Cocoa • Livestock: Beef Cattle, Goat, Poultry 	<ul style="list-style-type: none"> • Polewali, Mandar, North Mamuju • Mamuju, Mamasa, majene, Mandar, Polewali • Mamuju, Mamasa, majene, Mandar, Polewali • Mamuju, Mamasa, majene, Mandar, Polewali



27.	Central Sulawesi	<ul style="list-style-type: none"> Food Crops: Paddy, Maize, Peanut Horticulture: Shallot Estate Crops: Cocoa, Coconut Livestock: Cow, Goat, Village Hen 	<ul style="list-style-type: none"> Donggala, Parigi, Banggai, Maoutong Donggala, Palu Donggala, Parigi, Banggai, Maoutong Donggala, Parigi, Banggai, Maoutong
28.	South East Sulawesi	<ul style="list-style-type: none"> Food Crops: Paddy, Corn, Cassava Horticulture: Mango, Papaya, Orange, PineappleChili, Estate Crops: Cocoa Livestock: Beef Cattle, Poultry 	<ul style="list-style-type: none"> Konawe, Konsel, Bombana, Buton Kendari, Kolaka, Konawe, Buton Kendari, Kolaka, Konawe, Buton Kendari, Kolaka, Konawe, Buton
29.	North Maluku	<ul style="list-style-type: none"> Food Crops: Sweet Potato, Cassava Horticulture: Banana Estate Cocoa Clove Livestock: Beef Cattle, Goat 	<ul style="list-style-type: none"> North Maluku North Maluku North Maluku North Maluku
30.	Maluku	<ul style="list-style-type: none"> Food Crops: Paddy, Corn Estate Crops: Coconut, Cocoa Clove Livestock: Beef Cattle, Goat 	<ul style="list-style-type: none"> Central Maluku, South East Maluku Central Maluku, South East Maluku Central Maluku, South East Maluku
31.	Papua	<ul style="list-style-type: none"> Estate Crops: Palm Oil, Cocoa 	<ul style="list-style-type: none"> Jayapura, Manokwari, Yapen, Waropen
32.	West Irian Jaya	<ul style="list-style-type: none"> Food Crops: Sago, Paddy, Cassava, Soybean, Corn Horticulture: Banana Estate Crops: Palm Oil, Nutmeg, Coffee, Cocoa Clove Livestock: Native Chicken, Broiler 	<ul style="list-style-type: none"> Sorong Selatan, Kaimana, Manokwari Manokwari, Sorong Selatan Fak-fak, Kaimana, Teluk Bintuni, Sorong Selatan Sorong Selatan
33.	Gorontalo	<ul style="list-style-type: none"> Food Crops: Corn Estate Crops: Cocoa, Clove, Jatropa, Coconut, Sugarcane Livestock: Beef Cattle, Poultry 	<ul style="list-style-type: none"> Boalemo, Gorontalo, Pawoatu Boalemo, Gorontalo, Pawoatu Boalemo, Gorontalo, Pawoatu

4.2. Investment and Trade Opportunities by Project

1) MIFEE PROJECT IN MERAUKE PAPUA

Merauke District has proposed an integrated project called Merauke Integrated Food and Energy Estate (MIFEE). This project is part of the district efforts to be one of national food production center in Eastern Indonesia particularly to supply food for Papua, West Papua and North Maluku provinces by 2010. The concept of MIFEE project is modern agriculture management through area development approach, sustainable and environmental friendly, mixed and integrated farming in the minimum management production area of 1000 ha, based on scientific and research, market oriented, agricultural mechanization, stakeholders' involvement and agriculture waste as an alternative energy source and organic fertilizer.

MIFEE project focuses on major commodities such as paddy, cattle, fish, maize, soy bean and sugar cane. Total potential land for MIFEE reaches around 1.6 million hectares. It is projected to open agricultural land of 5000 hectares per year. In total, around 1.6 million hectares of agricultural lands in eight clusters of 200,000 hectares is expected to be established. Each cluster consists of 40 (forty) – 5,000 hectares sub-clusters (Production Center Area, PCA). Each PCA manages integrated major commodities.

Table 19. MIFEE Land Expansion Plan

Commodities	Area (ha)
Food crops	1,000,000
Livestock	100,000
Fishery	100,000
Estate crops	400,000
Total	1,600,000

As an illustration, in one production area of 5000 ha, 70% will be for food crops, 8% for livestock, 7% for fishery, 7% for estate crops and the rest 5% are for other purposes. Various stakeholders will also involve in the project. Government will involve in regulation/policy and finance of infrastructure; research institutions take part in technology development; private sector in business management; banking in funding; National Logistics Agency (BULOG) in marketing and farmers as skilled workers.

Target

a. Projected planted area	=	6.6 million ha in 3 zones
b. Production capacity (2 x harvest per year)	=	8 million ton/year
c. Rice production value per cluster (200.000 ha)	=	6.37 trillion/year
d. Investment value per PCA (5.000 ha)	=	Rp. 395 billion
e. Employment absorption (1 million ha)	=	100,000 people
f. Potential income per capita for the next 10 year	=	Rp. 75 million per capita/year
g. Projected amount of alternative energy of waste powered	=	500 mw

Investment Needed

1. Infrastructures :
National road (50 m/7 m) 700 km
Provincial/district road (30m/7m) 1,500 km
Sea - port 3 units
Digul dam (irrigation channels : 400 km)
Water and bio-energy powered electricity (500 mw)
2. Skilled workers: 160,000
3. Agroindustri manufactures development (agriculture machineries, food and beverage industry, seed industry, bio pesticides etc).

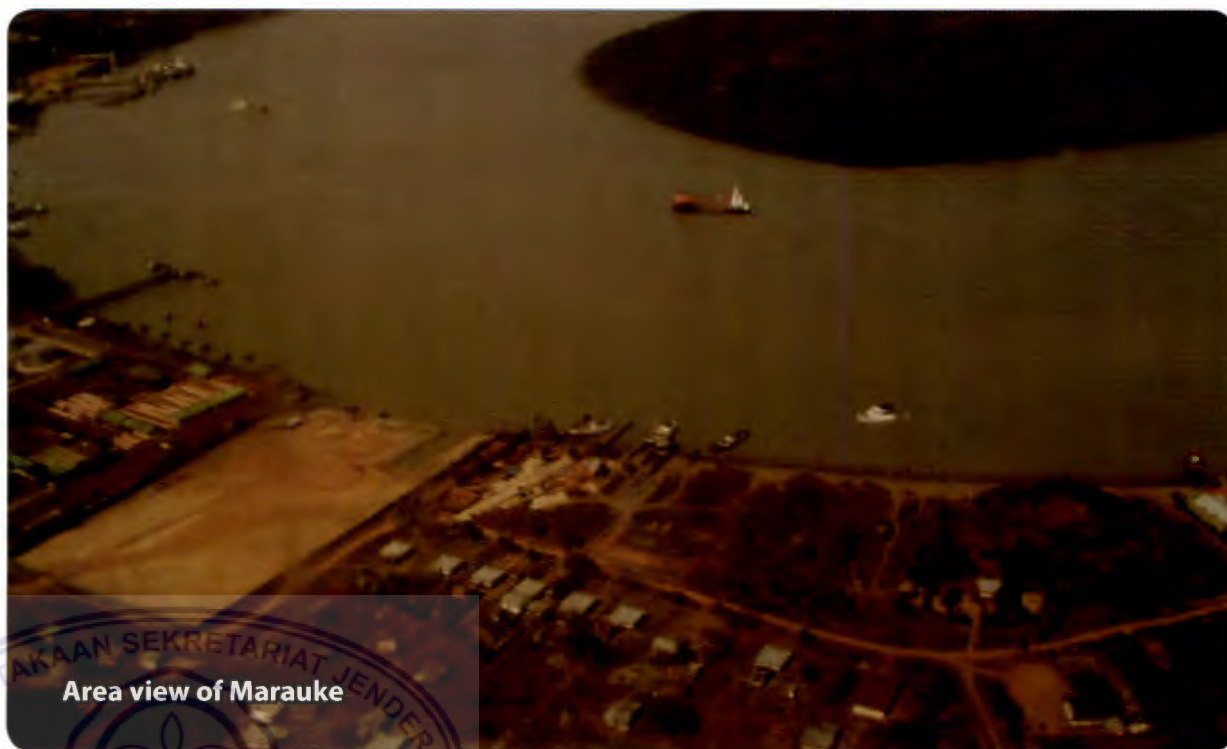
Investment Analysis for One PCA (5,000 Ha)

In developing one production center area (PCA) of 5,000 Ha, in the first year, total investment needed around Rp. 393,570 thousand or equivalent to approximately US\$ 43.7 million. This amount is to cover six types of investment i.e. infrastructure, land preparation and production system, housing and public facilities, agroindustry area, agriculture machinery, supporting facilities and transportation. Since economic period of equipment and machineries is 5 years, reinvestment is needed on

the 6th year. Meanwhile sources of revenue of PCA are from food crops production, livestock, fishery, and estate components.

From economic analysis with 15 years assumption as can be seen in Annex 1, break event point will be reached in 4th year time. The Net Present Value (NPV) for 15 years equal to approximately US\$ 124 thousand. Investment feasibility analysis shows that main indicators such as internal rate of return (IRR) and return on investment (ROI) values of 29.5 and 2.61 respectively are very attractive. This means that in term of bank ability, the above IRR value is very feasible since the value is far above present commercial loan interest (12-14%). ROI value also shows that investment on PCA will give additional revenue of 2.61 times higher than if investment is not conducted.

Through integrated approach, MIFEE project is expected to contribute in strengthening food security and continues supply of bio-fuel not only for domestic but also for international demand. In addition, it will contribute to poverty alleviation in the region, and reduce unemployment due to high labor absorption.



Area view of Marauke

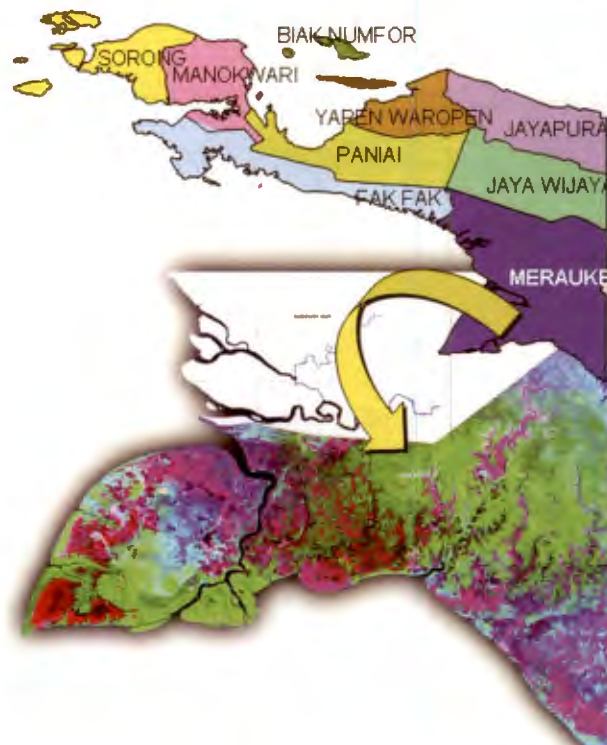
POTENTIAL LAND IN MERAUKE

Potential Land Availability

Merauke	: 2.4 million ha
Low Land	: 1.9 million ha
Up Land	: 0.5 million ha

AREA CHARACTERISTICS

- Total Area : 45,000 km²
- Total population : 174,000
- Consist of : 20 sub-districts and 160 villages
- Multi ethnics : 50% Malay and Javanese, 45% Melanasia, 5% Others
- Religions : 50% Moslem, 50% Catholic, Christian and Budhism
- Condusive security condition



INFRASTRUCTURES

- One major airport (Boeing 737)
- Two small airports (twin otter)
- One Seaport (84x15 m in length)
- National Road : 271 km
- Provincial Road : 233 km
- District Road : 1026 km
- 4 National and 1 Provincial Bank



AGRICULTURE INFRASTRUCTURES

- Primary irrigation canal : 236 km
- Secondary irrigation canal : 447 km
- Tertiary irrigation canal : 109 km
- Flood dike : 94 km
- Water gate : 151 units
- Other water structures : 308 units

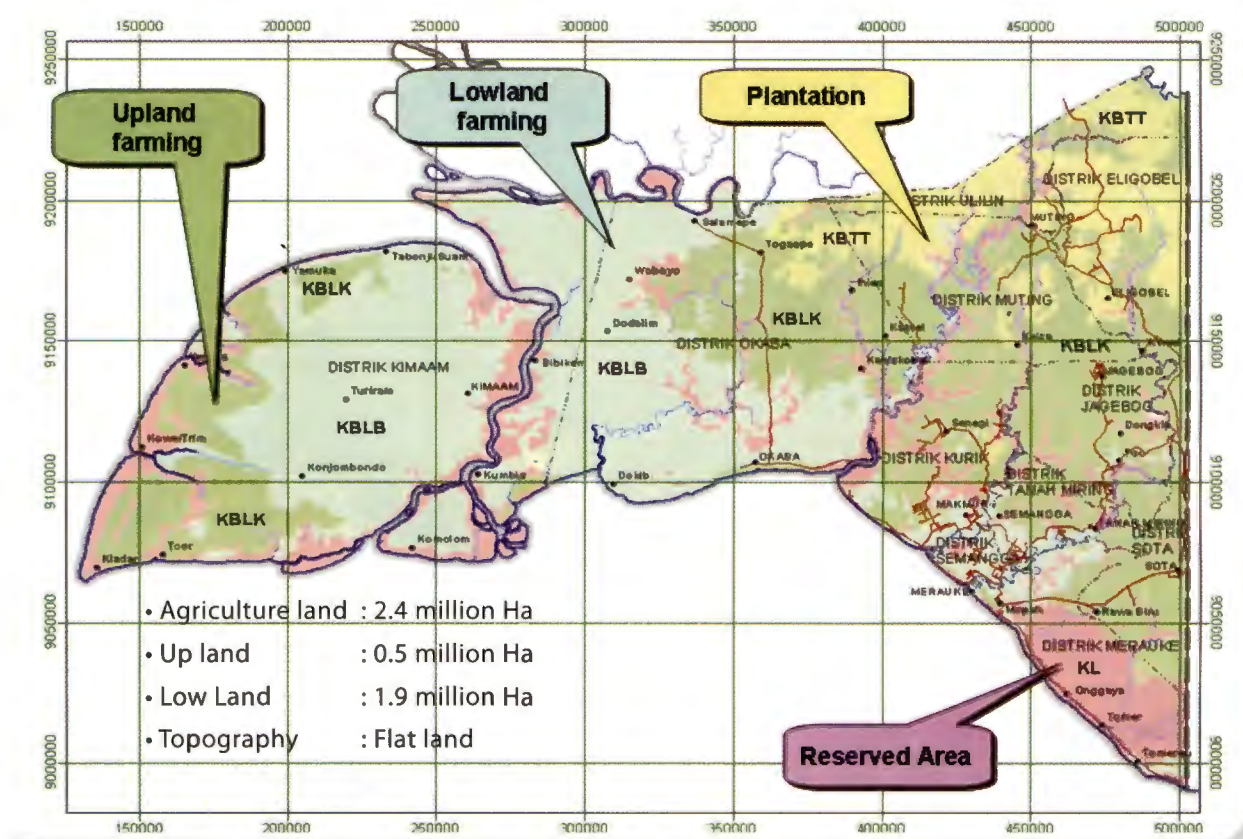


5 MAJOR COMMODITIES IN MERAUKE

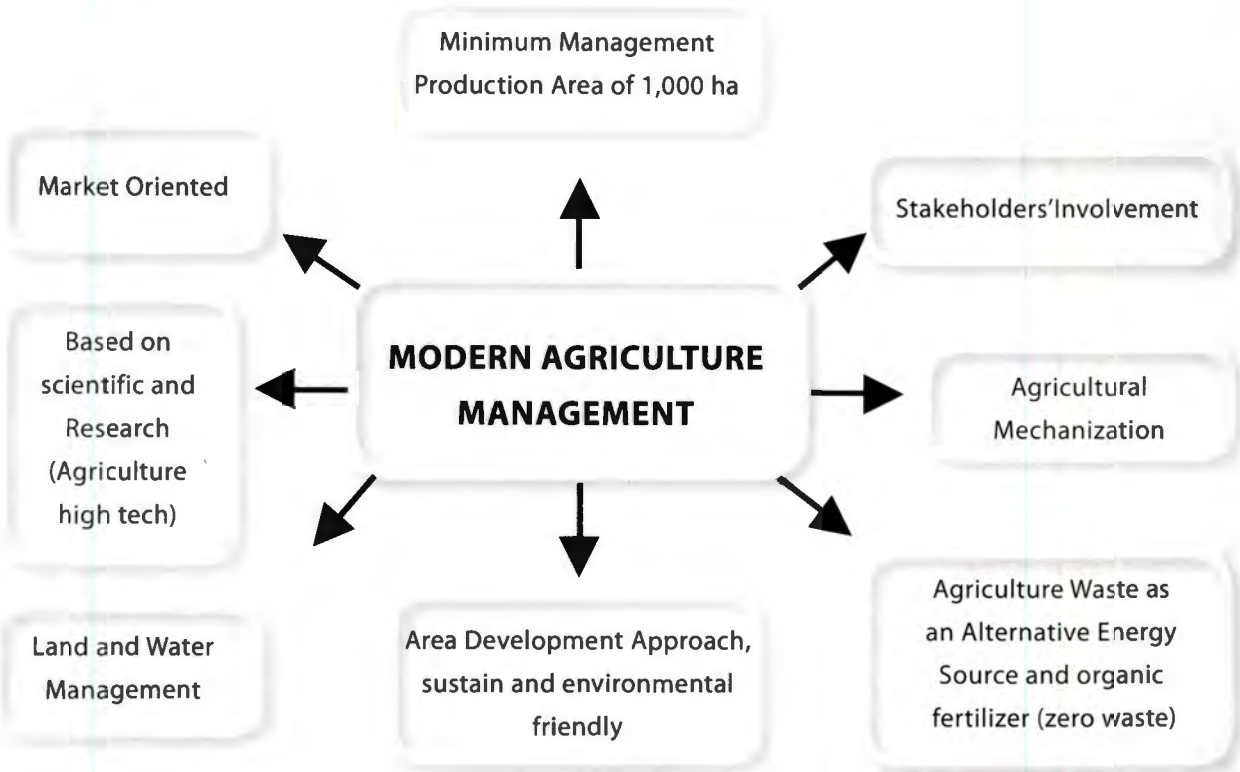
Commodity	Areas (Ha)	Production (Ton)	Real Yield (Ton/Ha)	Potential Yield (ton/Ha)
Paddy	19,318	69,332	3.6	7.5
Maize	126	217	1.7	2.2
Soybean	285	314	1.1	1.5

Commodity	Population	Potential Population
Beef Cattle (Head)	14,386	1,200,000

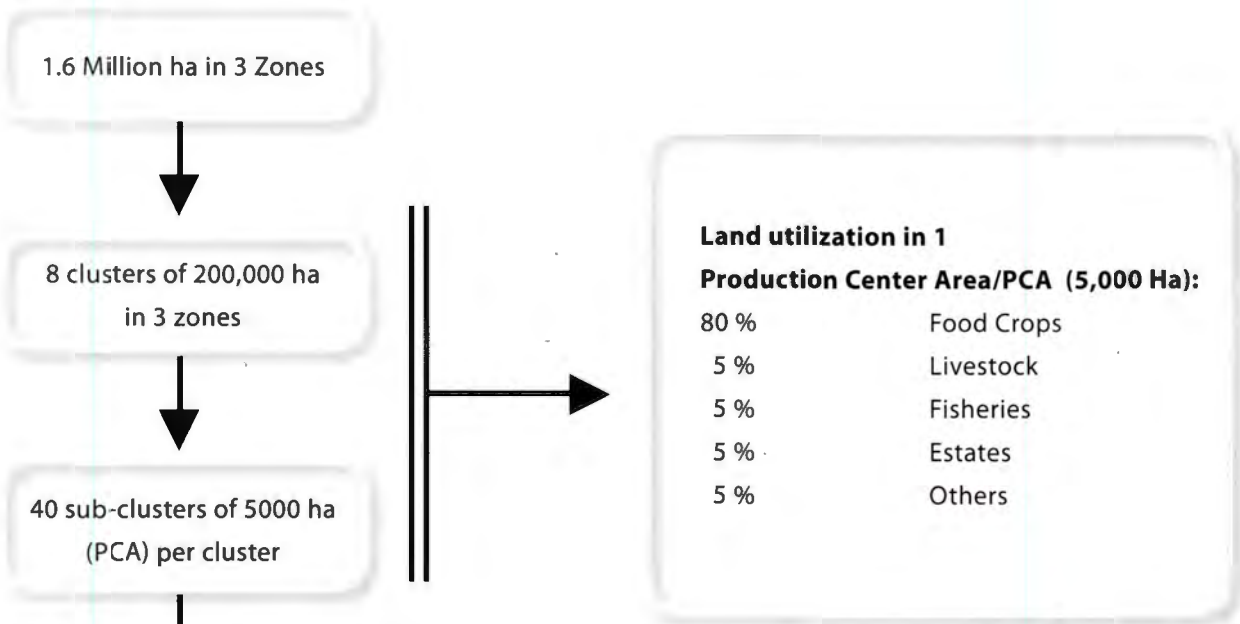
Sugar Cane Potential Yield 79.3 Ton/Ha



MIFEE CONCEPT



MIFEE LAND MANAGEMENT



In One PCA of MIFEE



Paddy 4.000 Ha



Seasonal Plants 100 Ha

**1 PCA
(5.000 Ha)**



Fish Pond 100 Ha



Estate 100 Ha



**Settlement and
public 100 Ha**



**Infrastructure (warehouse,
storage etc) 200 Ha**



Agro Industry 200 Ha

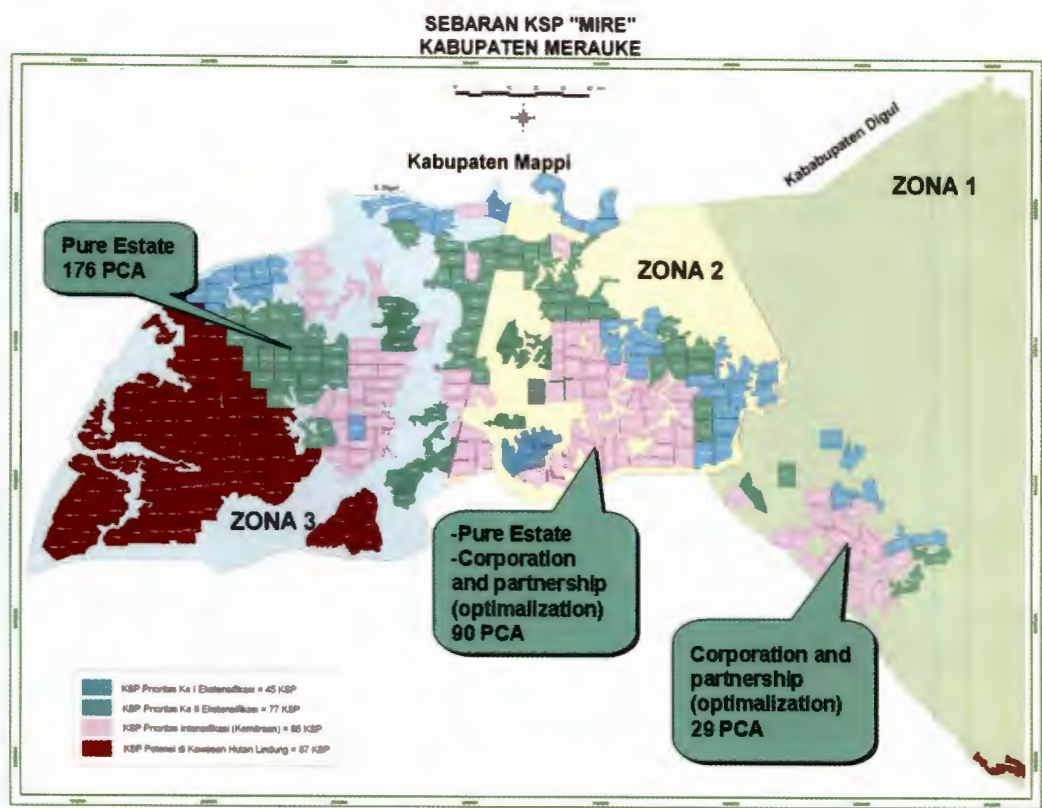


Livestock 100 Ha

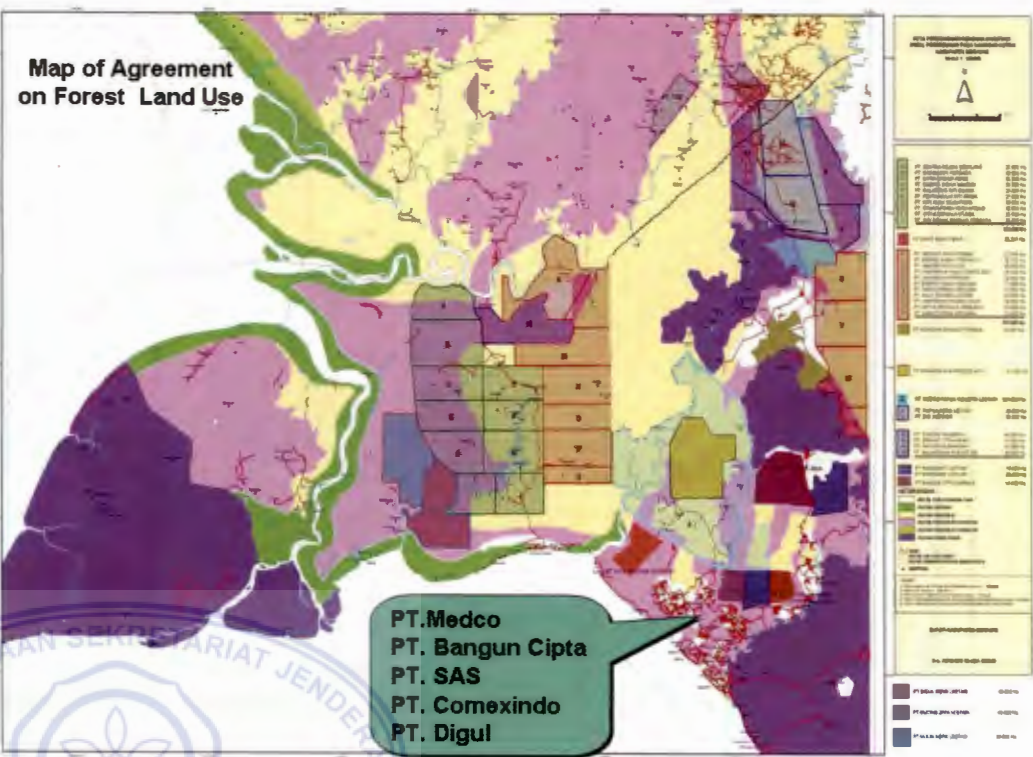


**Waste Processing/
Organic fertilizer 100ha**

MIFEE CONCEPT



MIFEE LAND MANAGEMENT



INVESTMENT NEEDED / OPPORTUNITY

Supporting Facilities

1. Infrastructures :

- National Road (50 M/7 M) 700 Km
- Provincial/District Road (30m/7m) 1,500 Km
- Sea - Port 3 Unit
- Digul Dam (Irrigation Canal : 400 Km)
- Water And Bio-energy Powered Electricity (500 Mw)



2. Skilled workers : 160.000 people.

3. Agroindustry Manufactures Development :

- Agricultural Machinery
- Food and Beverage Industry
- Seed Industry
- Bio Pesticide
- Etc.



Projected Investment Items and Cost for 1 PCA (5000 Ha)

Investment Items	Cost (000 Rp)	% against Invest
I. Infrastructure Development	178,615,000	45.4
II. Land Preparation and Production System	111,210,000	28.2
III. Housing and Public Facilities	37,000,000	9.3
IV. Agroindustry Areas	31,295,000	8.0
Agriculture Machineries	29,260,000	7.4
VI. Supporting Facilities and Transportation	6,190,000	1.7
Total	393,570,000 ~ US\$ 43.7 Million	100

Note : US\$ 1 = Rp 9,000

Investment- Economic Analysis 1 PCA (5,000 Ha) in 15 Years

- **BEP = 4th Year**
- **NPV = Rp 1.1 Billion ~ US\$ 124 Thousand**
- **R/C = 1.48**
- **IRR = 29.5**
- **ROI = 2.61**

Assumption

- Variable cost on food crops, livestock, fisheries and estate with production variable cost for paddy 3 million/ha, maize 2 million/ha, cattle 4.5 million/ha, fish Rp.200/fish
- Prices for 5% broken rice Rp.4,500/kg; Beef cattle Rp. 4 million/head; Maize flour Rp.8,000/kg; Fish for consumption Rp.8,000/kg
- US\$ 1 = Rp 9,000

Table 20. Total Need of Investment

NO.	COMPONENT OF INVESTMENT	VALUE (Million Rupiah)
1.	Fabric and waste disposable	895,570
2.	Building : <ul style="list-style-type: none">• Offices• Housing• Public Facility	14,304 59,540 39,729
3.	Land : <ul style="list-style-type: none">• Sold out of land• Land clearing• Estate layout	13,000 58,450 228,718
4.	Agriculture Equipment and Machinery	390,810
5.	Others	7,612
TOTAL		1,707,733

The total value of investment equal to US\$ 180 million

2) REVITALIZATION OF SUGAR INDUSTRY

Table 21. Plan of Sugar Industry Development

NO	PROVINCE	LOCATION	ACREAGE (Ha)	CAPACITY (TCD)
1.	South Sumatera	District of Ogan Komerling Hulu Timur	18,000	8,000
		District of Lematang Ilir Ogan Tengah	8,802	4,000
2.	Lampung	-	20,000	8,000
		-	20,000	8,000
3.	West Java	District of Garut	9,000	4,000
4.	East Java	District of Banyuwangi	9,000	4,000
5.	West Nusa Tenggara	District of Sumbawa	33,000	10,000
6.	Southeast Sulawesi	-	19,500	8,000
		-	16,000	8,000
		-	9,000	4,000
7.	Papua	District of Merauke	220,000	10,000

3) COCOA INDUSTRY DEVELOPMENT PLAN IN SOUTH SULAWESI

DESCRIPTION		DETAILS
Project Name	:	Cocoa Processing of Development Project in South Sulawesi
Project Type/Main Focus	:	Industry processing of raw materials (liquor, butter, powder, and cake) development
Location	:	Makassar City and Sub – Province of Bone
Budget (USD)	:	-
Time	:	5 (five) year operational
Investment Type	:	1. Partnership 2. Self capital/ direct – investment 3. Joint venture
Status	:	Cocoa beans in South Sulawesi were produced by smallholders estate crops in 2005, productivity 179,522 tonnes from total acreage as 224,745 ha in sub sector province of Luwu Utara, Luwu, Pinrang, Luwu Timur, and Bone
Contact Person	:	Estate Crops Services of South Sulawesi Province Jl. Urip Sumoharjo, Makassar – South Sulawesi Telp. 62-(411) 449918 ; 424869 Email : disbun@sulsel.go.id

4) LIVESTOCK INDUSTRY IN CENTRAL KALIMANTAN

DESCRIPTION		DETAILS
Project Name	:	Animal Husbandry Development Project in Central Kalimantan
Project Type/Main Focus	:	Beef Cattle Breeding Development
Location	:	In Regencies/City: Katingan, Gunung Mas and Seruyan
Work Scope	:	a. Supplying the beef cattle (inside and outside the country) b. Making the Stalls c. buying the stall equipment and livestock weight measurement tool. d. Making a hedge of fence (barbed wire) in the breeding place e. Planting livestock green food f. Seedling prime livestock green food g. Making livestock food storage h. Making water reservoir for livestock i. Making livestock waste processing place j. Supplying concentrate food k. Supplying medicine, vitamin and mineral

Budget (USD)	:	Rp. 867.000.000.000; or US\$ 102 millions
Time	:	5 (five) year operational
Investment Type	:	4. Partnership 5. Self capital/ direct – investment 6. Joint venture
Status	:	Ranch and beef cattle available in each location are detail as following: a. Katingan Regency Available land : 380.700 hectares Available cattle : 3.468 beef cattle b. Gunung Mas Regency Available land : 250.125 hectares Available cattle : 3.106 beef cattle c. Seruyan Regency Available land : 186.216 hectares Available cattle : 5.005 beef cattle
Contact Person	:	Veterinary Service of Central Kalimantan Province Jl. Willem A.S. No. 9 Palangkaraya 73112 Telp. 62-(0536) 21293, 27613, Fax 62-(0536) 27613

5) RUBBER INDUSTRY IN CENTRAL KALIMANTAN

DESCRIPTION		DETAILS
Project Name	:	Old rubber rejuvenation in small holder estate combined with intercropping plants/forest plants
Project Type/Main Focus	:	Rubber re-planting combined with forest plants on rejuvenated rubber land
Location	:	1. Barito Timur Regency (20.000 hectares) 2. Kapuas Regency (15.000 hectares)
Work Scope		Seedling and cultivating on old/damage rubber land for rehabilitation which combined with intercropping plants
Budget	:	US\$ 160 Million
Time	:	6 (six) year until productive
Investment Type	:	Partnership
Status	:	There are many unproductive land caused by old age
Contact Person		Estate Services of Central Kalimantan Province Jl. Jenderal Soedirman No. 18 Palangka Raya 73112 Telp. 62-(0536) 21363, 24763 Fax 62-(0536) 24763

6) DEVELOPING BUSINESS PARTNERSHIP AMONG FARMERS - PROCESSOR - EXPORTIR FOR ESSENTIAL OIL INDUSTRY

DESCRIPTION		DETAILS
Project Name	:	Developing Essential Oil Industry for Eksport
Project Type/ Main Focus	:	Fennel Oil, Vetiver Oil, Cubeb Oil, Alpinia Malaccensis Oil, Aetoxylon Oil, Agarwood Oil, Nutmeg Oil, Patchouli Oil, Ginger Oil, Massola Bark Oil, Cananga Oil, Citronella Oil, Sandalwood Oil, Clove Bud Oil, Clove Stem Oil, Clove Leaf Oil, Cinnamon Bark Oil, Black Pepper Oil.
Location	:	Garut, Bojonegoro, Lamongan, Tuban, Nganjuk, Malang, Trenggalek, Lampung Barat, Tanggamus, Manokware, Nusa Tenggara Timur, Maluku Barat, Mamasa, Buol.
Work Scope	:	a. Increase Production Area. b. Develop Processor Facilities/ Industry c. Improve Facilities for transport and export handling.
Budget	:	US\$ 5 Million
Time	:	5 (five) years
Investment Type	:	Partnership
Contact Person	:	PT Sumber Multi Atsiri. Telp/Fax: 0263-267739 Jl. Cianjur Bandung Km.8 No.268 Website: www.sumaessentialoil.com Email: eko@sumaessentialoil.com

7) FLORICULTURE INVESTMENT OPPORTUNITY

DESCRIPTION	DETAIL
Project Name	Development Floriculture Industry
Project Type / Main Focus	Foliage Plant, Ornamental Plant
Location	Tomohon, North Sulawesi, Bogor, Cianjur, Sukabumi - West Java, Malang - East Java, Ambarawa - Central Java
Work Scope for Investor	a. Increase Production Area b. Develop Seed Industry c. Increase Post Harvest Handling d. Increase Export Handling Facilities
Budget	US \$ 5 Million
Time	5 (five) Years
Investment type	Partnership ; Joint Venture
Contact person	Asosiasi bunga Indonesia - ASBINDO (Indonesian Flower Association) Komplek Liga Mas Indah - Perdatam Jl. Duren Tiga Indah Raya Blok I/12, Jakarta 12760 Phone : +62 21 7976442 Fax : +62 21 7976443 E-mail : asobunga@indosat.net.id

8) AGRICULTURAL PROMOTION CENTER

DESCRIPTION	DETAIL
Project Name	Agricultural Promotion Center in Indonesia
Project Type / Main Focus	Agricultural Promotion Center
Location	Cikampek - District of Purwakarta, West Java
Budget (USD)	US \$ 70 Million
Time	5 (five) Years
Investment type	1. Partnership 2. Self Capital/Direct Investment 3. Joint Venture
Status	1. Location of Agriculture Center from farmers, stakeholder, and private sector 2. Potencial various of agricultural products
Contact person	Directorate of International Marketing Directorate General of Processing and Marketing for Agricultural Products Ministry of Agriculture Republic of Indonesia Phone : +62 21 78832763 Fax : +62 21 78832763

4.3 Indonesian Attache of Agriculture

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Cell Phone : -
Email : attani@embassyofindonesia.org



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www.indonesianembassychina.com

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4.5 Indonesian Trade Promotion Center

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Fax. (49-40) 33313-377
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Within the period of 2008 - 2009 Government of Indonesia will establish it new ITPC in 22 cities Lagos, Santiago, Mexico City, Jeddah, Shanghai, Busan, Vancouver, Chicago, Chinnai, Lyon and Barcelona.

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