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Report Name: Food Processing Ingredients

Country: Indonesia

Post: Jakarta

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Report Highlights:

Indonesia currently imports 62 percent of raw materials for its growing food processing industry. The market presents significant opportunities for a range of U.S. agricultural products, including soybeans, wheat, dairy, distillers' grains, fresh fruit, and beef and beef products. De-spite tariff disadvantages, the U.S. remains Indonesia's largest supplier of agricultural products, exporting nearly $3 billion of products in 2020.

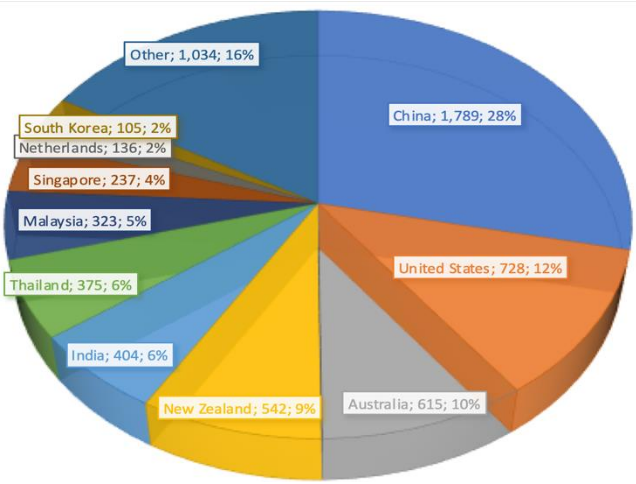
Post: Jakarta

Market Fact Sheet: Indonesia

Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 270 million in 2020. Fifty-six percent of the population is on Java island, one of the most densely populated areas in the world. In 2020, Indonesia's GDP reached $1,055 billion and GDP/capita reached $3,907(est.). Indonesia is a major producer of rubber, palm oil, coffee, and cocoa. In 2020, agricultural imports reached $19.4 billion ($6.3 billion was consumer-oriented products). In addition to consumer-oriented products, soybeans and wheat are top U.S. exports. Agricultural self-sufficiency is a stated goal of the Indonesian government and is often used to justify trade barriers and restrictions.

Import of Consumer – Oriented Products to Indonesia, 2020 ($million)



Food Processing Industry

The food industry is comprised of approximately 7,700 large and medium-sized producers and 1.7 million micro and small-scale producers. Most of the products are consumed domestically (mostly retail) and the market is considered highly competitive.

Food Retail Industry

Indonesian grocery retail sales reached $106 billion in 2020 (traditional grocery retailers held 80 percent share). There are four players in the hypermarket space (Carrefour/Trans Mart, Giant, Hypermart, and Lotte Mart), and six in the supermarket segment Alfa Midi, Hero, Superindo, Ranch Market & Farmers Market, Food Mart, The Food Hall). Major Convenience stores include Indomaret and Alfamart.

Food Service Industry

The foodservice sector's total contribution to GDP was about $23 billion (Rp319.5 trillion) in 2020. The sector is dominated by small restaurants and street-side restaurants known as *warungs*.

Quick Facts for 2020

Agricultural Product Imports: $19.4 billion
U.S. Share (16%) – $3.0 billion

Consumer-Oriented Product Imports: $6.3 billion
U.S. Share (12%) – $728 million

Edible Fish & Seafood Products Imports: $388 million
U.S. Share (10%) – $39 million

Top 10 Growth Products:
Dairy products, baked goods, baby food, confectionery, processed meat & seafood, savoury snacks, sauces, dressing & condiments, sweet biscuit, snack bars & fruit snack, and ice cream & frozen dessert

Top 10 Retailers
Indomaret, Alfamart, Alfa Midi, Transmart/Carrefour, Hypermart, Superindo, Giant, Lotte Mart, Farmer's Market, Hero

GDP/Population 2020
Population (millions): 270
GDP: $1,055 Billion
GDP per capita: $3,907

Economic Growth
2020: (- 2.07%)
2019: (+ 5.02%)

Source: Indonesia Statistics, GTA and Euromonitor

Strength/Weakness/Opportunities/Challenge	
Strengths	**Weaknesses**
Large Consumer Base	Inadequate infrastructure, including ports and cold storage facilities outside of the main island of Java
Opportunities	**Challenges**
Rapid growth of retail sector; Japanese, Korean, and Western restaurant chains; bakeries; expanding online sales platforms; growing export demand for processed products.	Challenging business climate, and unpredictable regulatory environment. Declining HRI and tourism sector due to COVID-19 travel restrictions

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COVID-19 Update

Background

Following the confirmation of its first case of COVID-19 in March 2020, the Government of Indonesia (GOI) implemented Large-Scale Social Distancing (PSBB) in most metropolitan areas to slow the spread of the disease. The GOI has since modified its policy on several occasions, most recently in February 2021 through the Restriction on Public Activities (PPKM). The updated policy allows 50 percent capacity for dine-in service at restaurants, a work-from-home policy for 50 percent on-site staffing levels, and limited operating hours for shopping malls. Indonesia began its vaccination program in January 2021. As of March 18, 4,838,752 people had received first dose vaccinations and 1,948,531 people had received a second dose.

Impacts

The second quarter of 2020 was a difficult period for food and beverage manufactures. The National Statistics Agency (BPS) noted minimal sector growth of 0.22 percent (year-over-year), following 3.94 percent growth during the first quarter. This slowdown directly correlates to the implementation of PSBB, which disproportionately impacted businesses in large cities, including Jakarta which is estimated to contribute nearly 40 percent of national retail food and beverage sales. According to the Indonesian Food and Beverage Association (GAPMMI), the growth of the food and beverage industry in the first half of 2020 was supported by the consumption of cooking oil, seasoning, milk products, breakfast foods, canned fish and meat, instant noodles, and biscuits. Despite challenges and an initial period of adjustment, the food and beverage industry grew by 1.58 percent in 2020. Large food producers have continued to launch new products to capitalize on increased in-home consumption and the industry has moved to smaller packaging sizes, which are better suited for retail consumers. For additional information on the impact of COVID-19 on the food processing sector, please see: Exporter Guide 2020, page 6.

SECTION I. MARKET SUMMARY

The Indonesian food processing industry serves a domestic population of 270 million and is increasingly seeking new export markets in the region and globally. Despite the economy contracting by just over two percent in 2020, as Southeast Asia's largest economy Indonesia continues to offer significant market potential for U.S. suppliers of food and ingredients. In 2020, about 40 percent of imported agricultural products by value were major inputs for food processing. Major U.S. products utilized in food processing include soybeans, wheat, milk powder and other dairy products, corn (wet milling), and beef.

The Ministry of Industry has reported that 62 percent of the food and beverage industry's raw materials come from imports[1]. Additionally, GAPPMI notes that the food and beverage industry requires imports for 80 percent of milk ingredients, 70 percent of soybeans, 100 percent of sugar, and 80 percent of certain salts. Strong demand is expected to continue as the industry expects to grow by 5-7 percent in 2021, supported by a stronger domestic economy and export sales, which increased by 15 percent since the onset of the pandemic.

[1] https://www.kompas.id/baca/ekonomi/2020/11/21/subtitusi-impor-mesti-dimulai-dengan-membangunhulu/

Much of the industry's domestic growth will be driven by middle and upper-income consumption, which constitutes 82 percent of national food consumption[2].

Table 1: Key Economic Data

Description	2016	2017	2018	2019	2020
GDP ($billion) **	931	1,014	1,042	1,120	1,055
GDP/Economic growth	5.03%	5.07%	5.17%	5.02%	-2.07%
Value of F&B industry ($billion)	55.6	62.3	65.0	71.7	72.3
Contribution F&B industry to GDP	6.0%	6.1%	6.3%	6.4%	6.8%
Investment realization in F&B sector ($billion)	4.5	4.8	4.0	3.9	3.5

Source: Bank Indonesia 2020, BPS 2020 & BKPM 2020
***GDP at market prices*

Major Food and Beverage expansions in 2020:

- Indonesian conglomerate Djarum group has entered the milk processing business through a new subsidiary, Global Dairi Alami. Under the *Milk Life* brand, they produce pasteurized milk and yogurt and currently operate farms with approximately 6,000 Holstein Friesian cows from Australia.
- The rising demand of frozen food in Indonesia has led Diamond Food Indonesia to launch a new brand *Riverland* to produce frozen chicken and meat sausage for retail and foodservice.
- Singapore-based ice cream company AICE has opened their third factory in North Sumatera, Indonesia. With this additional factory, the company aims to strengthening domestic market distribution and develop export markets within the Southeast Asia region. In 2019, the company built the largest ice cream factory in Indonesia, located in East Java. The total investment value for both factories is $36 million[3].
- Nippon Indosari Corpindo, a subsidiary of Indonesian conglomerate Salim Group, is ready to operate two new bakery factories in Pekanbaru and Banjarmasin with an estimated investment of $29 million. Currently, the company operates a total of 14 factories in Indonesia and Philippines[4].
- Wings Food Group has launched a new UHT milk, which represents the company's first ready-to-drink (RTD) milk. According to Wings Food, RTD milk is one the most promising products in the beverage category, experiencing 10 percent growth each of the last three years[5].
- Frisian Flag (a local subsidiary of the large Dutch dairy cooperative) will invest $293 million to build a new dairy plant to produce condensed and pasteurized milk with a focus on exports. Construction is expected to start in 2021[6].
- Through its local subsidiary PT Sorini Agro Asia Corporindo, Cargill has invested $100 million to construct a new corn wet mill and starch drying facilities to meet increasing demand for food and feed ingredients. The factory is in East Java and expected to begin operations in late-2021 or early 2022[7].

[2] https://industri.kontan.co.id/news/gapmmi-industri-makanan-dan-minuman-bisa-tumbuh-5-7-tahun-depan
[3] https://industri.kontan.co.id/news/bangun-pabrik-baru-aice-investasikan-rp-500-miliar
[4] https://industri.kontan.co.id/news/nippon-indosari-corpindo-roti-siap-mengoperasikan-dua-pabrik-baru-tahun-ini
[5] https://mix.co.id/marcomm/news-trend/masuk-pasar-rtd-milk-wings-food-luncurkan-milku/
[6] https://www.cnbcindonesia.com/news/20201120163114-4-203442/top-pabrik-susu-bendera-tambah-investasi-rp-4-t-mulai-2021
[7] https://industri.kontan.co.id/news/cargill-mengucurkan-investasi-us-100-juta-ke-sorini-agro-asia-corporindo

- Bungasari Flour Mills Indonesia has invested $90 million to open new factories in Makassar and Medan to meet increasing demand for flour Sumatra and Eastern Indonesia[8].

Advantages	Challenges
Large consumer base, dominated by millennials and Gen Z, which account for 54 percent of population[9].	Challenging to expand some U.S. products beyond middle and upper-income consumers due to price-sensitivities.
Indonesia does not produce/produce enough quantities of key ingredients or specific varieties (e.g., wheat, fresh milk, beef, dried fruits, grapes, apples, pears, almonds, raisins).	Import requirements for agricultural products are complex and change frequently. Registration processes for retail products and foreign establishments can be lengthy and costly.
Rising income and consumption has coincided with greater demand for meat and dairy products.	Strong competition from regional markets (Australia, New Zealand, China) with lower duties on meat, dairy, and fresh fruits
The GOI has recognized the United States' Food Safety Control System for 89 Fresh Foods of Plant Origin (FFPO).	Issuance of Import Recommendation (RIPH) and Approval Permit (SPI) are non-transparent and burdensome.
Upper middle-income consumers are more likely to purchase from modern stores due to convenience and quality.	About 93 percent of modern grocery retailers are minimarkets/convenience stores, which mostly sell local products[10].

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

Please see Exporter Guide 2020, page 3,4,10 for information on how to enter the Indonesian market, including market research, local business customs, import procedures and regulations, and information on trade shows in Indonesia.

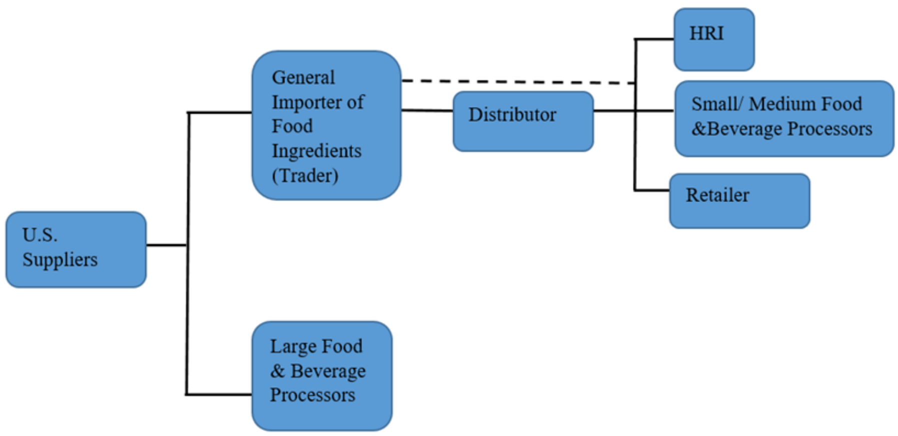
Distribution Channels

Large food manufactures who also export, such as Indofood or Mayora , prefer to import directly rather than source from local distributors or importers due to advantages received through export incentives, which waive import duty and value added tax. The diagram below provides an overview of common distribution channels.

[8] https://ekonomi.bisnis.com/read/20201222/257/1334427/bungasari-flour-mills-ekspansi-ke-sumatera-dan-makassar

[9] BPS data, millennials (24 – 39 years), Gen Z (8 – 23 years)

[10] Euromonitor data 2020



Market Structure

There are approximately 7,700 large and medium-sized food and beverage manufacturers and 1.7 million micro and small establishments in Indonesia. The number of Indonesian workers in the food and beverage processing industry stands at 4.6 million, or 28 percent of the total workforce in the manufacturing sector[11].

Large and medium-sized food processors in Indonesia source raw materials both locally and globally, with large food processors directly importing ingredients such as wheat, milk powder, cheese, meat, and horticultural products. Food Processors usually purchase small quantities of additives, flavors, or preservatives through general importers or distributors.

Share of Major Segments in the Food Processing Industry

Indofood continues to lead the packaged food market in Indonesia. The company has a wide-ranging product portfolio, including local and multinational brands. Other major processors include Nestlé and Royal Friesland Campina (Friesan Flag). Many of their products are sold through modern stores. The rapid expansion of convenience stores, which mostly stock locally produced products, has helped to expand the distribution of packaged food throughout Indonesia.

Table 2: Indonesia Sales of Packaged Food 2016 – 2020 (in US$ million)

Retail Packaged Food	2016	2017	2018	2019	2020	Share (2020)
Rice	6,625.4	7,089.2	7,514.5	7,988.0	8,587.1	25.13%
Dairy	3,018.9	3,284.8	3,586.6	3,890.0	4,244.4	12.42%
Noodles	2,491.4	2,569.9	2,767.2	2,944.6	3,152.2	9.22%
Baby Food	2,610.9	2,735.2	2,822.3	2,897.4	3,065.7	8.97%
Baked Goods	2,171.8	2,293.9	2,396.7	2,540.2	2,695.7	7.89%
Confectionery	1,896.5	1,915.8	1,997.7	2,134.1	2,138.7	6.26%
Edible Oils	1,370.7	1,468.7	1,644.6	1,842.6	2,066.3	6.05%
Savory Snacks	1,488.8	1,605.9	1,715.8	1,859.9	2,004.0	5.86%
Processed Meat and Seafood	1,516.1	1,625.3	1,481.4	1,687.8	1,980.8	5.80%
Sauces, Dressings and Condiments	1,437.0	1,565.1	1,651.2	1,749.6	1,862.6	5.45%
Sweet Biscuits, Snack Bars and	1,247.5	1,322.9	1,388.9	1,471.5	1,534.7	4.49%

[11] BPS - Statistics Indonesia 2021

Fruit Snacks						
Ice Cream and Frozen Desserts	371.9	386.7	398.8	426.5	451.0	1.32%
Sweet Spreads	137.2	152.3	163.1	175.6	192.5	0.56%
Breakfast Cereals	79.2	85.3	89.6	95.1	101.4	0.30%
Processed Fruit and Vegetables	38.1	40.5	42.2	44.3	46.9	0.14%
Pasta	24.4	26.1	27.4	28.8	29.8	0.09%
Ready Meals	10.6	11.3	11.8	12.4	13.2	0.04%
Soup	5.8	6.2	6.4	6.7	7.0	0.02%
Total Packaged Food	26,542.1	28,185.2	29,706.1	31,795.1	34,174.2	100%

Source: Euromonitor

Table 3: Top Company Profiles & Product (2020)

No	Global Company Name	Product Portfolio	Retail Sales Value (US$ million.)
1	Indofood Sukses Makmur Tbk PT	Dried ready meals, bouillon, dried sauces, pasta sauces, cooking sauces, ketchup, soy sauces, chili sauces, baby food, butter, and spreads, drinking milk products, ice cream, snacks, biscuits, noodles, pasta	3,752.5
2	Nestlé Indonesia PT (Nestlé SA)	Confectionery and chocolate, coffee, beverages (drinking milk and RTD beverages), breakfast cereals, condensed milk	1,460.2
3	(Frisian Flag Indonesia PT) Royal Friesland Campina NV	Drinking and condensed milk product	1,202.2
4	Sarihusada Generasi Mahardhika PT (Danone Group)	Baby food and maternal milk	1,107.4
5	Heinz ABC Indonesia PT (Kraft Heinz Inc)	Juices, condiments and sauces, baby food	642.5
6	Mayora Indah Tbk PT	Biscuit, beverages (coffee, tea, bottled water), candy, wafer & chocolate, coffee, cereal, instant food (noodles and porridge)	637.9
7	Unilever Indonesia Tbk PT	Soy sauce, drinking juice, ice cream, tea, mayonnaise, bouillon (seasoning)	613.7
8	Wings Group	Instant noodle, sauces, powdered drinks, RTD beverages (tea, juice, energy), coffee	607.9
9	Perusahaan Ceres PT (Delfi Ltd)	Chocolate, wafer, biscuits, candy, RTD chocolate beverages	433.6
10	So Good Food PT	Sausage, frozen meat (chicken), nuggets and other processed chicken meat	422.8
Others			10,880.7
Total			34,174.2

Source: Euromonitor and company website

Sector Trends

About 70 percent of Indonesians are considered "working age". Increasingly, many consumers research and shop for food products online, are social media savvy, and seek out products with nutritious ingredients. As awareness of a healthy lifestyle among consumers in urban areas increases (a trend prior to the pandemic that had only increased in the past year), more products are being offered which promote their health benefits. Recently launched examples of health-oriented products include Fitbar (snack bar), Tropicana Slim (milk, cookies, soy sauce, etc.), and Lemonilo (noodle and snack). Other market sector trends include:

Wheat flour-based products. Demand for wheat flour-based products is growing rapidly, both for domestic consumption and export of processed products. The export value of this category in 2020 reached $1.1 billion, an increase of 9 percent from the previous year, with the largest contribution coming from wafers, biscuits, and pasta. The local artisan bakeries are also on the rise as entrepreneurs establish small enterprises to sell baked goods online, which has become a booming business in the era of the pandemic. Additionally, brick and mortar cake and bakery shops continue to sprout up in larger cities, offering high-quality products by using premium ingredients such as imported butter, almonds, raisins, and cheese.

Frozen food. According to the Indonesian Cold Chain Association (ARPI), the COVID-19 pandemic has significantly boosted consumption of frozen foods, reaching 11.58 million tons in 2020 – a 17 percent increase from 2019. Seafood consumption alone accounted for 45 percent of frozen food consumption, followed by chicken (22 percent), meat (8 percent), with processed dairy products and fruits and vegetables comprising the balance. The Association predicts the frozen food business will grow between 25-30 percent in 2021[12].

Snack food. According to the State of Snacking 2020 survey released by Mondelez International, Indonesians snack on average three times a day (40 percent higher than the global average). Although savory snacks (potato chips, tortilla chips, puffed snacks, etc.) are very popular in Indonesia, the increased desire for healthy products that meet the convenience of busy urban consumers is shifting the preference to more nutritious snack foods.

SECTION III. COMPETITION

The United States remains the largest supplier of Indonesia's agricultural imports, with a 16 percent market share. Main competitors include China (garlic, apples, pears, and grapes), Brazil (soybean meal, cane sugar, cotton, corn), Australia (cane sugar, live cattle, beef, wheat, milk powder, fresh fruits), India (cane sugar and beef/buffalo), and Argentina (soybean meal, wheat, corn, whey, and cotton).

Indonesia has implemented trade agreements with ASEAN countries, China, Chile, South Korea, India, Japan, Hong Kong, New Zealand, Australia, and Pakistan in the form of Comprehensive Economic Partnership Agreements, Free Trade Agreements and Preferential Trade Agreements. Agricultural products from those countries, such as milk powder, beef, apples, grapes, cheese, and oranges enter the market at more competitive rates than U.S.

[12] https://www.kompas.id/baca/ekonomi/2021/02/17/bisnis-serba-beku/?_t=

products. However, many U.S. products continue to increase their market share based on price, quality, and availability.

Agricultural Imports in Indonesia (values in $million)

Partner Country	Calendar Year					%Δ 2020/2019	January	
	2016	2017	2018	2019	2020		2020	2021
United States	2,677	3,209	3,389	3,164	3,011	-4.8%	219	256
China	1,817	2,270	2,597	2,659	2,556	-3.9%	161	223
Brazil	1,708	1,492	1,360	1,311	2,025	54.5%	143	130
Australia	2,724	2,879	2,431	1,922	1,832	-4.7%	88	254
Argentina	1,334	1,132	1,397	1,768	1,708	-3.4%	144	64
Thailand	1,728	1,772	2,467	1,868	1,274	-31.8%	46	60
India	602	771	1,044	840	1,102	31.1%	61	131
Canada	487	525	631	792	769	-2.9%	67	91
Ukraine	510	429	604	730	732	0.2%	57	4
New Zealand	494	531	544	545	606	11.2%	35	32
Other Country	3,404	4,090	5,222	4,548	3,794	-16.6%	354	356
Total	17,484	19,100	21,687	20,148	19,408	-3.7%	1,375	1,602

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECT CATEGORIES

Indonesian Imports of Consumer-Oriented Products, 2020 ($million)

Product	2020	Average Annual Growth		Top Supplier Country
		2015 - 2019	2016 - 2020	
Dairy Products	1,611	6.4%	9.9%	New Zealand (28%), USA (23%), Australia (10%), Netherlands (5%)
Fresh Fruit	1,154	22.3%	10.2%	China (71%), Australia (7%), USA (7%), Thailand (5%)
Beef & Beef Products	718	35.7%	6.0%	Australia (44%), India (37%), USA (10%), New Zealand (5%)
Fresh Vegetables	690	8.0%	4.8%	China (88%), New Zealand (4%), India (3%), Netherlands (1%)
Soup & Other Food Preparations	509	3.0%	5.1%	USA (17%), Singapore (13%), Malaysia (13%), China (13%)
Processed Vegetables	260	-0.8%	-8.3%	Thailand (26%), China (24%), USA (18%), Belgium (9%)
Bakery Goods, Cereals, & Pasta	167	16.5%	5.1%	Malaysia (35%), Thailand (19%), South Korea (12%), China (11%)
Processed Fruit	137	16.0%	11.1%	Egypt (17%), Tunisia (16%), China (17%), UAE (8%), USA (8%)
Tree Nuts	41	20.9%	1.6%	China (29%), USA (29%), Vietnam (17%), Philippines (10%)
Fruit & Vegetable Juices	25	-1.4%	-3.7%	Brazil (27%), China (20%), USA (11%), UAE (9%)
Meat Products NESOI	11	-11.3%	-18.7%	Australia (76%), France (12%), China (4%), USA (2%)

Pork & Pork Products	8	11.4%	16.5%	China (56%), Spain (18%), USA (14%)
Wine & Related Products	5	62.8%	-9.9%	Australia (30%), France (18%), Chile (13%), Italy (11%), USA (8%)
Other Product	953			
Total Consumer-Oriented Products	6,288	12.0%	6.1%	China (28%), USA (12%), Australia (10%), New Zealand (9%)

Source: TDM

Products Present in the Market which have Good Sales Potential

Dairy Ingredients. Demand for U.S. dairy ingredients has been on the rise over the past four years, with a record volume and value exported in 2020. Indonesia's import demand for U.S. SMP is high and mostly used as an ingredient by large food and beverage manufactures. For more information, please see Indonesia: Dairy and Product Annual 2020.

Beef & Beef Products. The United States is the third largest supplier of beef to Indonesia after Australia and India (buffalo meat), with 10 percent of the import market share in volume. Indian buffalo meat gained access to Indonesia in 2016 and is currently only imported by state-owned enterprises (BUMN). Brazilian beef, which gained access in 2019 has also seen a steady increase in volumes, including BUMN purchases. According to the Indonesian Meat Importers Association (ASPIDI), the projected domestic consumption for beef in 2021 is around 696,000 tons. Of this amount, about 60 percent can be supplied domestically and 40 percent through imports. About 37 percent of imports are carried out by BUMN and 63 percent by the private sector. The need for beef reaches its peak during the Eid al-Fitr and Eid al-Adha Holiday[13].

In 2020, U.S. beef imports declined by 14 percent as HRI demand dropped due to the pandemic. However, overall retail and foodservice demand for U.S. beef remains strong, especially for sliced U.S. Beef Short Plate, which is used by a growing number of Japanese and Korean restaurants. U.S. beef is also used as ingredients in frozen food manufacturing e.g., sausage, meatball, ready-to-cook meals etc.

French Fries. Increasing urbanization, a growing middle-class dominated by the younger Indonesians and the expansion of fast-food chains have increased demand for frozen French Fries. Indonesia does not produce sufficient frozen French Fries to meet demand, relying on imported sources for the majority of consumption. Approximately 27 percent imported of frozen French Fries are U.S. origin. European countries are the main competitors for U.S French Fries, especially Belgium. For the past three years, Belgian potato producers have aggressively conducting marketing promotions to the Indonesian market through B2B and retail-oriented approaches in addition to exhibitions and other trade events. In 2020, Belgium replaced the U.S. as the largest supplier of French Fries to Indonesia.

Fruit Ingredients. Frozen/dried fruits, such as dates, coconut, raisins, prunes, apricots, blueberries, and cranberries have considerable market potential. Demand artisanal bread and

[13] https://industri.kontan.co.id/news/kata-aspidi-soal-impor-daging-yang-ditugaskan-pada-bumn

cake makers looking for high-quality ingredients and consumer preferences for healthy products combine to favor these ingredients. Demand for dates in particular is high during the month of Ramadan, when they're often consumed as part of breaking the daily fast.

Products with Limited Presence in the Market but which have Good Sales Potential

Wine, almonds, juices / concentrate, fresh cut flowers, cherries, avocado, peaches, raspberries, blackberries, blueberries, prepared luncheon meat, frozen meals, frozen bakery items, fresh cheese, and baby food.

Product Not Present Because They Face Significant Barriers
Poultry and egg products.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

FAS – U.S. Embassy Jakarta
Jl. Medan Merdeka Selatan 5 Jakarta
Web: www.usdaindoneisa.org
E-mail: AgJakarta@fas.usda.gov
Tel: +62 21 50831162

Food Standard and Registration
The National Agency for Drug and Food Control (BPOM)
Web: www.pom.go.id

Indonesian Food & Beverage Association
Web: www.gapmmi.or.id
Email: gapmi@cbn.net.id

Indonesian Fruit & Vegetables Exporters & Importers Association
Email: info@aseibssindo.org

Association of Indonesian Meat Importers
Email: asp_1984@cbn.net.id
National Meat Processor Association
Email: nampa@napa-ind.com

Dairy and Meat Approval Directorate General of Livestock and Animal Health Services
www.ditjennak.pertanian.go.id
Animal/Plant Quarantine and Inspection
Indonesian Agricultural Quarantine Agency
www.karantina.pertanian.go.id

U.S. Cooperators and MAP Participants
U.S Cooperators and MAP Participants
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Attachments:

No Attachments