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# **Report Name:** Retail Foods

**Country:** Indonesia

**Post:** Jakarta

**Report Category:** Retail Foods

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**Report Highlights:**

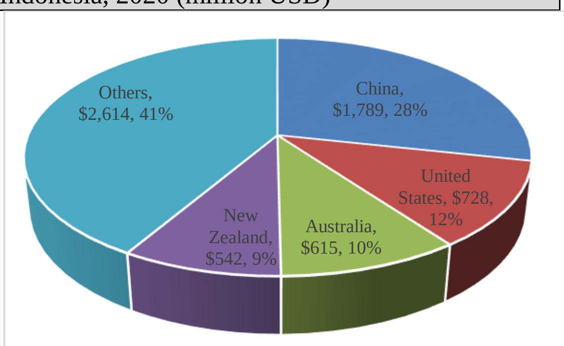
Social distancing measures related to COVID-19 are changing how Indonesian consumers shop, forcing retailers to seek more customers online and re-think store formats and location. After an initial increase following the onset of the pandemic, retail grocery sales ended 2020 down 13 percent at $97 billion.

**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 per 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 of which was consumer-oriented products). In addition to consumer-oriented products, soybeans and wheat are top imports. 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 USD)




## Food Processing Industry

The food processing 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 $97 billion in 2020 (traditional grocery retailers held 79 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 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 and Retail Market Update**

COVID-19 remains uncontrolled throughout Indonesia. The Government of Indonesia (GOI) began a nationwide vaccination effort in January 2021. As of June 2021, 13.18 million people are fully vaccinated (4.72 percent of the population). Cases have surged to record highs following the Eid-al-Fitr holiday in May 2021, leading the GOI to tighten existing policies of Micro Restriction on Public Activities (PPKM). From June 22 – July 5, new restrictions have been placed on shopping malls, restaurants, and other stores, limiting operational hours, and reducing customer capacity to 25 percent. The policy also extends to offices, where companies operating in non-essential sectors are required to adopt a work-from-home policy and limit on-site staffing to 25 percent.

Social distancing policies have negatively impacted several hypermarket and supermarket chains, especially those predominantly located within malls and lifestyle/shopping centers. Grocery retailer Hero Group (operator of Hero and Giant stores) saw 2020 sales decline by 33 percent to $418 million compared to 2019. Hero Group recently announced plans to close all Giant stores (approximately 75 hypermarket and supermarket stores across Indonesia) in July 2021. Other major retailers have faced similar challenges. Citing lower customer traffic, Matahari Putra Prima (operator of more than 130 stores under brand Hypermart, Hyfresh, Foodmart and Primo Supermarket) reported a 2020 sales decline of 22 percent, to $462 million.

The global pandemic and social mobility restrictions has forced retailers to seek new models for reaching consumers, including omni-channel sales, and collaborating with online market platforms and ride hailing companies. Matahari Putra Prima launched a strategy in August 2020 to collaborate with leading marketplace operators such as GrabMart, Shopee, and Tokopedia, aiming to achieve 8-10 percent of total sales online in 2021, compared to 4 percent in 2020 and less than 1 percent in 2019. The company is also considering transforming their hypermarket formats to smaller stores, in line with the current market trends where convenience stores have benefited from their many smaller locations closer to residential areas. Other retailers, such as Supra Boga Lestari (operator of Ranch Market, Farmers Market, the Gourmet and Day 2 Day), have launched their own online shopping applications to provide instant delivery to customers. The agility of some retailers has produced positive results. Supra Boga Lestari reported a sales revenue increase of 26 percent year-over-year, due to store expansion and increased efficiencies. Indonesia's second largest convenience store, Alfamart, also managed to generate growth of 2 percent in 2020, reaching sales of $3.5 billion.

Retail sales in 2021 are likely to see mixed performance, as Indonesia continues to balance social mobility restrictions to prevent the spread of the virus with the need to increase economic growth following significant declines in 2020. The GOI is prioritizing vaccination, however logistical challenges in receiving and distributing vaccines to an island nation of over 260 million have hampered efforts. The realization of forecasts to return to 4-5 percent growth in 2021 may ultimately depend on how vaccination efforts proceed.

## SECTION I. MARKET SUMMARY

Despite COVID-19 related setbacks, which led to a 13 percent decline in retail sales in 2020, Indonesia's grocery retail sector remains one of the most promising markets in Asia. Driven by a large population, growing middle class, and increasing urbanization, Indonesia presents opportunities for a full spectrum of consumer-oriented products.

Current trends in Indonesia's retail food industry include:

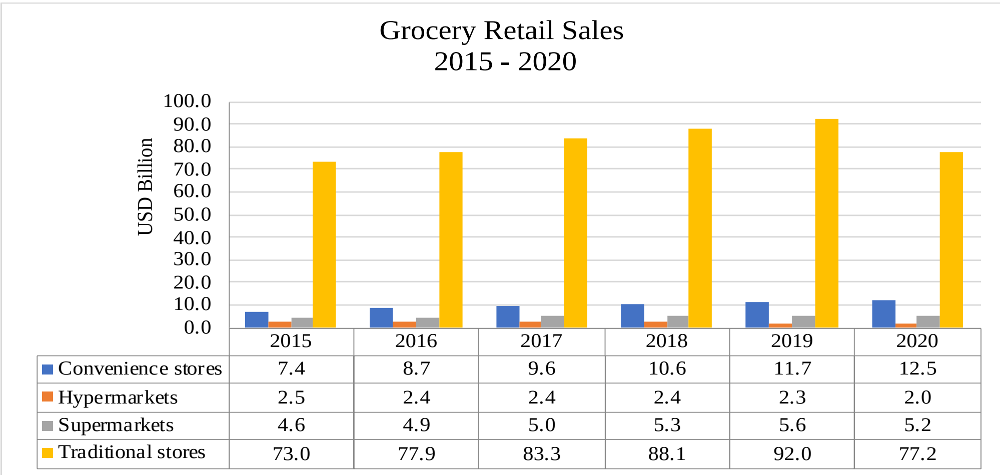
- **Online Shopping**. Modern retailers continue to expand their online presence to boost sales performance through e-commerce. Imported food products are widely available in online platforms such as Tokopedia and Shopee, which are sold by both importers and local retailers operating official stores within the platforms.
- **Specialty Stores**. In urban areas such as Jakarta, Bandung, and Surabaya, specialty stores are increasing in popularity. These stores offer high-quality imported products focusing on specific product categories, e.g., fruits, meat, seafood, organic products, premium poultry products etc. These specialty stores target upper-middle consumers and are often located near residential areas.
- **Small Format Stores**. Supermarket and hypermarket operators have recently launched smaller format stores to compete with large convenience chains and reach consumers closer to their homes. Examples include Supra Boga Lestari launching Day 2 Day and Matahari Putra Prima launching Hyfresh stores.
- **Supermarket Refrigeration Trends.** With increased demand for frozen food and fresh products, modern retailers have expanded their retail refrigeration capacity. According to The Indonesian Cold Chain Association (ARPI), the total national consumption of frozen food in 2020 increased by 17 percent to 11.58 million tons, and is expected to grow an additional 25-30 percent in 2021.
- **On-the-Go Packaging**. Convenience stores such as Indomaret and Family Mart have added imported fresh fruits in the form on-the-go packaging to their product portfolio, available in urban areas.
- **Health Foods**. The trend towards healthier lifestyle continues as urban consumers seek healthier alternatives to mainstay processed products. The trend has resulted in the newly launched supermarket Growell Whole Foods, which focuses on healthy and organic food products. The new outlet offers certified GMO-free products from the U.S., Japan, United Kingdom, and South Korea.

| Advantages | Challenges |
| --- | --- |
| The digital transformation in e-commerce and ride-hailing apps in Indonesia will provide opportunity for the retail sector to reach more customers who are increasingly relying on online shopping. | Slow technology adoption within the demographic groups who live in rural areas. |
| Healthy lifestyle trends are increasing opportunities for fresh products e.g., meat, fruits, and dairy. | Importing these products requires a lengthy and burdensome licensing process. |
| Younger consumers are driving demand for a variety of snack foods. | Imported snack foods are mostly available only in premium supermarkets |
| Modern grocery channels continue to increase the variety of products and locations, continuing a shift from traditional markets. | Indonesia's modern retail sector is still dominated by traditional outlets, accounting for 79 percent of total grocery retail sales. |

### Grocery Retail Outlets by Channel in Indonesia

| Category | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|---|---|
| Traditional | 4,593,483 | 4,589,788 | 4,574,208 | 4,546,222 | 4,512,891 | 4,474,316 |
| Convenience stores | 26,102 | 29,142 | 31,460 | 32,701 | 34,715 | 36,146 |
| Supermarkets | 1,319 | 1,341 | 1,377 | 1,400 | 1,428 | 1,457 |
| Forecourt | 550 | 611 | 651 | 685 | 728 | 730 |
| Hypermarkets | 299 | 314 | 333 | 330 | 336 | 337 |

Source: Euromonitor International




Source: Euromonitor International

## SECTION II. ROADMAP FOR MARKET ENTRY

### Entry Strategy

Please see this report: Exporter Guide 2020, page 3 for information on how to enter the Indonesian market, including market research and local business customs.

### Trade Shows in Indonesia

| Name of Event | Location | Dates of Event | Website |
|---|---|---|---|
| Food and Hotel Indonesia 2021 | Jakarta | 22 – 25 September, 2021 | www.foodhotelindonesia.com |
| SIAL Interfood 2021 | Jakarta | 10 - 13 November, 2021 | https://sialinterfood.com/ |
| Food, Hotel & Tourism Bali, 2022 | Bali | 17 – 19 March, 2022 | www.fhtbali.com |
| Hotelexpo Indonesia 2022 | Jakarta | 27 – 29 July, 2022 | www.hotelexpoindonesia.com |
| Food Ingredients Asia 2022 | Jakarta | 7 – 9 September, 2022 | https://www.figlobal.com/asia-indonesia/en/home.html |

### Import Procedure

Please utilize the links below for information on import procedures, regulations, tariffs, approved U.S. establishments and retail products:

- Retail Product Registration Guide for Imported Food and Beverages – This report provides guidance on the registration process for retail foods.
- Food and Agricultural Import Regulations and Standards - Export Certificate 2020– This report provides information on certificates required to export food and agricultural products to Indonesia.
- Food and Agricultural Import Regulations and Standards - Annual Report 2020- This report provides information on Indonesia's import requirements for food and agricultural products.
- Tariffs and FTAs Information - Based on HS Code
- List of U.S. Processed and Retail Products in Indonesia - this site provides an updated list of U.S. products that have received approval for retail sale in Indonesia.
- Approved U.S. establishments: Dairy Products, Meat Products, Pet Food
- U.S. Dairy Plant Registration Guidelines – this report provides information on the questionnaire/process required to apply for approval to export U.S. dairy products.
- Guide to Re-selling Containerized Cargo After Arrival

**Distribution Channels**

Distribution of imported products in Indonesia is limited to mostly urban areas and mostly through supermarkets, hypermarket, and specialty stores, especially for perishable productssuch as dairy, meat, and fresh fruits. Convenience stores benefit from their wide distribution centres, with warehouses located across Indonesia. However, they mostly sell local products and few imported products in small packaging which are affordable for middle-lower income consumers, such as confectionery and snacks. Wet markets in Jakarta and other, secondary cities may offer limited imported products such as lower quality fresh fruits and secondary cuts of beef and offal. Grocery retailers procure foreign products via local importers or distributors due to regulations prohibited them from importing directly. However, some supermarkets have designated affiliate companies established expressly for importing directly.

**Market Structure**

**Convenience Stores**

Indomaret continues to lead the category with more than 18,000 outlets across Indonesia, followed by Alfamart with nearly 15,000 outlets. About 90 percent of sales value for convenience stores in Indonesia is derived from these two companies, which have modern, integrated distribution systems and centralized procurement. Convenience stores are expected to continue to be the fastest growing grocery retail segment, with an average of 1,000 new outlet expansions each year. Convenience stores have demonstrated their resiliency and necessity during the pandemic, providing reasonably priced products closer to residential areas during periods of mobility restrictions.

**Hypermarket/ Supermarket Stores**

Hypermarkets and supermarkets are generally located in malls and shopping centers, and generally offer 5 to 30 percent imported food and beverage products. The percent of imported products can be as much as 60 percent for some premium or high-end stores. Those premium outlets target upper-middle income and high-income consumers with a large variety of imported products such as fresh fruits, meat, snacks, condiments, and dairy.

Superindo, Farmers, and Ranch Market are the top three supermarket brands in Indonesia, while the hypermarket category is led by Transmart Carrefour, Hypermart, and Giant. Major supermarkets and hypermarkets offer in-store bakeries, cafés and restaurants, and prepared meals, with grocery products typically contributing about 65 percent of total sales. Additional information on Indonesian supermarket/hypermarket chains can be found in this report: Retail Chain Overview and Product Survey

**Specialty Stores**
Increasing demand for healthy food options has led to the expansion of specialty stores focusing on fresh meat, fruit and vegetables, and seafood. Found mostly in major urban areas, outlets such as Total Buah, Rumah Buah, Frestive, and All Fresh offer high quality fresh produce to middle-upper income consumers. Meatshops have also expanded, as demand for quality meat and seafood has increased. Stores such as Indoguna Meatshop, Goodwins Butchery, Celine Meatshop, Bumi Maestro Ayu, and Stevan Meatshop sell premium cuts of beef, fresh and frozen seafood, and condiments.

**Traditional Stores**
This category consists of wet markets and independent grocery stores (mom and pop stores), which still account for about 79 percent of retail grocery sales. Some traditional markets sell imported products such as apples, mandarins, oranges, grapes, pears, and meat. Traditional small grocers do not carry the variety of products and services offered by minimarkets, instead selling affordable, mostly local food and beverage products familiar to local consumers. This differentiation, along with location, helps them remain competitive against modern retail outlets.

**Top Indonesian Food Retailers (2020)**

| No | Brand Name | Sales Value (USD million) | Number of Outlet |
|---|---|---|---|
| 1 | Indomaret (Salim Group) | 5,900 | 18,271 |
| 2 | Alfamart (Sumber Alfaria Trijaya Tbk PT) | 5,256 | 14,973 |
| 3 | Transmart Carrefour (Trans Retail Indonesia PT) | 954 | 137 |
| 4 | Alfa Midi (Sumber Alfaria Trijaya Tbk PT) | 863 | 1,761 |
| 5 | Hypermart (Matahari Putra Prima Tbk PT) | 414 | 98 |
| 6 | Super Indo (Koninklijke Ahold Delhaize NV) | 382 | 177 |
| 7 | Giant (Dairy Farm International Holdings Ltd) | 334 | 87 |
| 8 | Lotte Mart (Lotte Group) | 278 | 41 |
| 9 | Farmer's Market (Supra Boga Lestari Tbk PT) | 124 | 29 |
| 10 | Hero (Dairy Farm International Holdings Ltd) | 86 | 19 |

Source: Euromonitor 2020

**Retail Sales Value of Alcoholic Drinks, Soft Drinks and Packaged Food (US$ million)**

| Product | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|---|---|
| Alcoholic beverages | 527 | 589 | 637 | 651 | 719 | 510 |
| Soft drinks | 6,814 | 7,526 | 7,641 | 7,398 | 7,877 | 7,477 |
| Packaged food | 25,083 | 28,033 | 29,600 | 29,318 | 31,577 | 34,174 |
| Cooking ingredients and meals | 2,832 | 3,128 | 3,364 | 3,432 | 3,761 | 4,142 |
| Baby Food | 2,493 | 2,758 | 2,872 | 2,785 | 2,878 | 3,066 |
| Dairy | 2,867 | 3,188 | 3,450 | 3,540 | 3,863 | 4,244 |
| Baked goods | 2,094 | 2,294 | 2,409 | 2,365 | 2,523 | 2,696 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Breakfast Cereals | 72 | 84 | 90 | 89 | 95 | 101 |
| Processed fruit and vegetables | 37 | 40 | 43 | 42 | 44 | 47 |
| Processed meat and seafood | 1,385 | 1,601 | 1,707 | 1,462 | 1,676 | 1,981 |
| Noodles | 2,408 | 2,631 | 2,699 | 2,731 | 2,924 | 3,152 |
| Pasta | 23 | 26 | 27 | 27 | 29 | 30 |
| Rice | 6,181 | 6,998 | 7,445 | 7,416 | 7,933 | 8,587 |
| Confectionery | 1,674 | 1,943 | 1,956 | 1,919 | 2,069 | 1,907 |
| Ice cream and frozen desserts | 353 | 393 | 406 | 394 | 424 | 420 |
| Savoury snacks | 1,421 | 1,572 | 1,687 | 1,693 | 1,847 | 1,818 |
| Sweet biscuits, snack bars and fruits snacks | 1,184 | 1,378 | 1,463 | 1,467 | 1,626 | 1,634 |

Source: Euromonitor 2020

## SECTION III. COMPETITION

### Local Competition

Local companies have a strong presence in the food and beverage market. Locally produced noodles, biscuits, confectionery, savoury snacks, processed meat, processed dairy products (such as UHT milk, cheese and yoghurt), canned fish, and tropical fruits dominate retail shelves. In recent years, local producers have increased organic branding of fresh vegetables such as spinach and kale due to growth in demand from wealthier urban populations seeking healthier lifestyle products. Major multinational companies, including Nestle, Unilever, Friesland Campina, Danone, and Kraft Heinz, locally produce a variety of dairy-based products, ready-to-drink beverages, condiments, and baby food.

### Import Market Competition

In 2020, total Indonesia consumer-oriented products imports were valued at $6.2 billion. Imports from the United States totalled $724 million, an increase of 12 percent year-over-year. Indonesia mostly imports products that serve as inputs to food manufacturers or aren't produced in adequate volumes locally, such as milk powder, French fries, beef, fresh and processed fruits and vegetables, and wine. The United States competes with New Zealand, Australia, and the EU in the dairy products category, with China and Australia in the fresh fruit category, and with Australia and India in the beef products category. Consumers in Indonesia view U.S. beef as a high-quality, premium product which competes with Australian beef at high-end supermarkets and hypermarkets, whereas Indian beef (buffalo meat) is mostly sold in traditional wet markets.

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

| Product | Indonesia import from the world (value in million USD) | | | %Δ 2020/19 | Indonesia import from the U.S (value in million USD) | | | %Δ 2020/19 |
|---|---|---|---|---|---|---|---|---|
| | 2018 | 2019 | 2020 | | 2018 | 2019 | 2020 | |
| Dairy Products | 1,371 | 1,552 | 1,611 | 3.8% | 179 | 252 | 377 | 49.3% |
| Soup & Other Food Preparations | 511 | 504 | 509 | 1.1% | 91 | 91 | 95 | 4.5% |
| Fresh Fruit | 1,202 | 1,368 | 1,154 | -15.6% | 90 | 100 | 84 | -16.1% |
| Beef & Beef Products | 725 | 851 | 718 | -15.6% | 52 | 86 | 74 | -13.6% |
| Processed Vegetables | 355 | 371 | 260 | -29.8% | 48 | 61 | 46 | -25.1% |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Tree Nuts | 52 | 56 | 41 | -27.6% | 12 | 16 | 12 | -26.9% |
| Processed Fruit | 139 | 135 | 137 | 1.1% | 15 | 15 | 11 | -24.7% |
| Non-Alcoholic Bev. (ex. juices, coffee, tea) | 112 | 105 | 88 | -16.7% | 1 | 2 | 5 | 164.2% |
| Dog & Cat Food | 93 | 95 | 120 | 26.4% | 5 | 4 | 4 | -17.3% |
| Condiments & Sauces | 97 | 100 | 90 | -9.7% | 3 | 4 | 3 | -18.9% |
| Bakery Goods, Cereals, & Pasta | 192 | 193 | 167 | -13.6% | 2 | 2 | 3 | 48.7% |
| Tea | 52 | 64 | 46 | -28.2% | 1 | 2 | 3 | 44.7% |
| Fruit & Vegetable Juices | 22 | 25 | 25 | -0.7% | 3 | 2 | 3 | 17.2% |
| Coffee, Roasted and Extracts | 160 | 114 | 93 | -17.9% | 2 | 2 | 1 | -34.1% |
| Pork & Pork Products | 9 | 4 | 8 | 82.6% | 2 | 2 | 1 | -44.6% |
| Chocolate & Cocoa Products | 178 | 191 | 145 | -24.1% | 2 | 2 | 1 | -66.9% |
| Poultry Meat & Prods. (ex. eggs) | 0 | 1 | 1 | -50.6% | 0 | 1 | 1 | -42.9% |
| Fresh Vegetables | 590 | 626 | 690 | 10.2% | 1 | 0 | 1 | 398.0% |
| Wine & Related Products | 19 | 15 | 5 | -68.5% | 1 | 1 | 0 | -61.9% |
| Chewing Gum & Candy | 59 | 64 | 60 | -6.2% | 0 | 0 | 0 | -11.4% |
| Spices | 211 | 163 | 171 | 5.2% | 0 | 1 | 0 | -54.9% |
| Meat Products NESOI | 15 | 17 | 11 | -39.5% | 0 | 0 | 0 | -13.8% |
| Distilled Spirits | 19 | 11 | 5 | -52.2% | 1 | 1 | 0 | -83.4% |
| Eggs & Products | 12 | 11 | 12 | 6.0% | 0 | 0 | 0 | -4.9% |
| Beer | 3 | 2 | 0 | -77.5% | 0 | 0 | 0 | -80.6% |
| Nursery Products & Cut Flowers | 7 | 9 | 8 | -14.2% | 0 | 0 | 0 | 763.3% |
| Total | 6,206 | 6,647 | 6,174 | -7.1% | 513 | 648 | 724 | 11.7% |

Source: Trade Data Monitor

## SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Best Prospective U.S. Products for the Indonesian Food Retail Market

- Fresh fruits
- Beef
- Cheese
- Snack foods
- Frozen food
- Condiments

Top Consumer-Oriented Products Imported from the World

- Beef
- Garlic
- Food preparation: non-dairy creamer, food supplement etc
- Milk and cream powder
- Sauces
- Grapes
- Apples
- Pears
- Malt Extract
- Mandarin
- Whey and lactose
- Dog and cat food
- Butter
- Longan
- Coffee
- French fries

Top Consumer-Oriented Products Imported from the United States

- Milk and cream powder
- Food preparation: food supplement and flavouring
- Apples
- Frozen beef
- Grapes
- French fries
- Malt extract
- Whey and lactose
- Almonds
- Onion powder
- Cheese
- Raisins
- Oranges
- Dog and cat food

Products Not Present in Significant Quantities but which have Good Sales Potential

- Wine
- Cherries
- Plums
- Avocado
- Blueberries
- Strawberries
- Pistachios
- Fresh cut flowers
- Prunes
- Peaches
- Soups and broths

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

FAS – U.S. Embassy 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

**Attachments:**

No Attachments