



# The Indonesian TEXTILE AND CLOTHING INDUSTRY

## WHAT'S INSIDE

Textile and clothing industry is one of Indonesia's leading export commodities to earn foreign exchange. With growing world consumption, textile and clothing sector provides huge opportunities for producing countries, such as Indonesia, to supply world famous clothing brands. In addition to supplying well known fashion brands, Indonesia also has a major supplier for military uniform which comes with various specialized features.

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Dear Valued Readers,

Textile and clothing are one of human's primary needs which have evolved together with progresses in mankind. The Ministry of Trade has designated textile and clothing as one of the major Indonesian export commodities for the 2014-2015 period.

The habits of modern society have always affected the society's lifestyle, economics, social and culture which are reflected in the shifting market trends in textile and clothing products. Textile and clothing products usually consist of fibers, yarns, fabric and the end products.

May edition of Export News, brought to you by the Directorate General of National Export Development of the Ministry of Trade, talks about Indonesian textile and clothing products. This will include the export development and other important information international buyers need to know in buying Indonesian textile and clothing products. As usual, we also include the list of Indonesian textile and clothing exporters allowing foreign buyers to make a direct contact.

Thank You

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## *hot* issue

### The Indonesian textile and clothing industry

The Indonesian textile and clothing industry has become a major export commodities and employ a huge number of workers, partly thanks to the ever progressing technology. The product has a strategic role in industrialization process for producing various items from raw materials (fabrics) to end products (clothing and other finished products) and has linkages with other industry and economic sectors. Textile and clothing products in general can be applied in other industries, such as creative industry (fashion), agriculture, sector, infrastructure and construction development, and many others.

The ever-growing world's population has led to increased consumption and demands for textile and clothings. This can be an opportunity for producers to keep increasing their market share both at home and in the international markets. Indonesian manufacturers are well known worldwide for their ability to supply famous textile and clothing brands. Export of Indonesian textile and clothing products in 2013 reached some 8.5% from the total non-oil-and-gas export, proving that Indonesia has the potentials and excellence.



Textile and clothing sector is one of Indonesia's top industry because in addition to providing foreign exchange, the industry also employs huge number of workers. However, there are still lingering problems holding the industry back from even faster growth, such as expensive energy rates, inefficient seaports, old machineries and rampant illegal import products, especially from China. Despite such shortcomings, Indonesian textile and clothing products are still well received in the international market thanks to their relatively high competitiveness. In fact, the contribution from exported Indonesian textile and clothing products in earning foreign exchange keeps increasing each year.

Indonesian textile and clothing products are using both natural and artificial fibers. Most of the artificial fibers are already produced domestically while natural fiber, ie cotton, still has to be imported due to limited domestic production. As textile and clothing has been designated a priority export commodity, the Directorate General for National Export Development (DGNED) of Ministry of Trade is conducting various promotion activities to boost non-oil-and-gas export.

The Indonesian public in general is still familiar to ordinary textile products which are based on low to medium technology. Products based on high

technology, or advanced textile, are still under development. Advanced textile can be used in other applications other than garments, including agriculture, construction, infrastructure, health, defense and transportation.

Indonesia is exporting various textile and clothing products, including:

- Fibers: natural (silk, wool, cotton) and artificial;
- Yarn: silk, wool, cotton, filament, and staple fiber;
- Fabric: woven (silk, wool, cotton, filament, staple), felt, non-woven, woven file fabric, terry towelling fabric, gauze, tulle and others net fabric, lace, narrow woven fabric, woven badges and similar, braids in the piece, woven fabric of metal thread, embroidery, quilted textile product, impregnated, coated covered or laminated textile fabric, knitted fabric;
- Garment: knitted and non-knitted;
- Others: carpet (floor covering, tapestry), wedding, thread cord, label, badges, braid & similar, house/tube textile, conveyor belt, textile product of technical uses, others made up textile articles.

#### SOURCES:

- 1 Ministry of Trade : [www.kemendag.go.id](http://www.kemendag.go.id)
- 2 Directorate General for National Export Development : [djpen.kemendag.go.id](http://djpen.kemendag.go.id)
- 3 Ministry of Agriculture : [www.pertanian.go.id](http://www.pertanian.go.id)
- 4 Statistics Indonesia : [www.bps.go.id](http://www.bps.go.id)
- 5 International Rubber Consortium Limited (IRCo) : [www.irco.biz](http://www.irco.biz)
- 6 International Trade Centre: [www.trademap.org](http://www.trademap.org)
- 7 International Rubber Conference Organisation: [www.internationalrubberconference.org](http://www.internationalrubberconference.org)

# THE GROWING

Indonesian textile and clothing products

## Market Review

The development in today's society's modern lifestyle is often reflected through clothing, food and housing aspects. Various types of clothing, for example, need to be comfortable for a number of different usage according to the requirement. Clothing always change in a relatively short time leading to proliferating textile and clothing industry all over the world. Garment is one example of finished products from textile and clothing products.

Textile and clothing generally consists of natural and artificial fibers, fabrics, household textiles and carpets as well as textile being used in industrial application. The products are categorized under various Harmonized System (HS) codes, from HS 50 until HS 60 and HS 63 while garment is organized under HS 61 and HS 62.

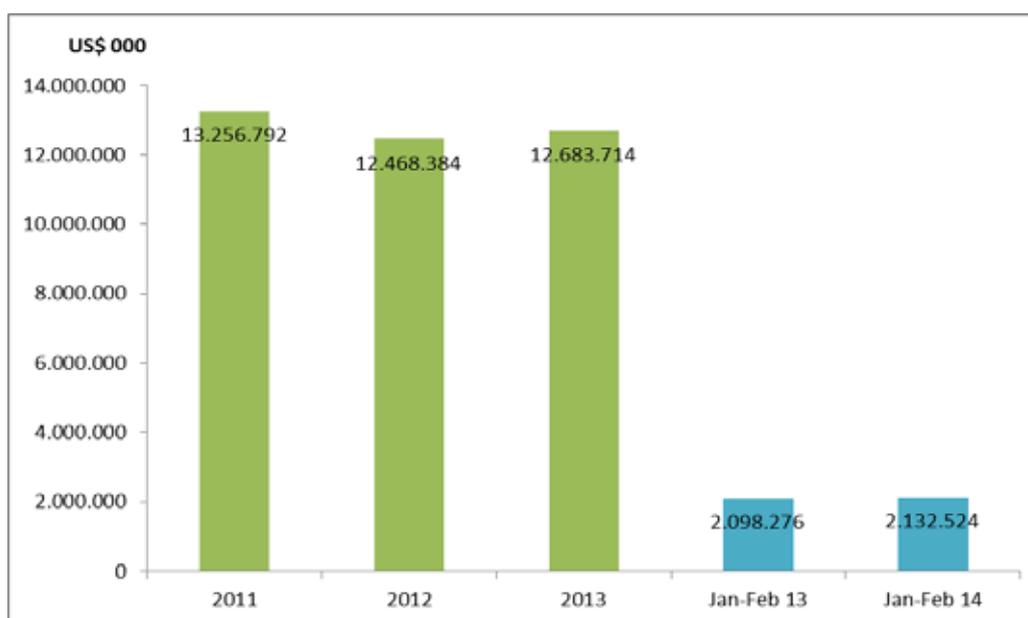
Based on data from the International Trade Centre (ITC), the world's import of textile and clothing products in 2012 was valued at US\$681 billion, decreasing by 2.57% when compared to US\$699 billion in the previous year. However, there was

an annualized growth of 5.35% in the 2008-2012 period.

China dominated the market with a market share of 33.31%, thanks to its high competitiveness, cheap price, abundant workforce with low wages, the availability of cotton locally, and government policies which benefit Chinese textile and clothing producers. Germany and Italy stood at the distant second and third places with market shares of 4.74% and 4.61% respectively. Both countries have developed their textile products and become the centers of world fashion.

Meanwhile, Indonesia's marketshare is still a low at 1.69% providing a huge opportunity to increase its competitiveness and optimize the country's presence in the international market. In the few past years, there have been emerging countries making textile and clothing products, such as Vietnam and Bangladesh, which have managed to supply the international markets with marketshares above 3%.

**Graph 1. Export of Indonesian Textile and Clothing in 2011-2014 (January-February)**



Source: Central Statistics Agency (BPS)

Based on data from the Central Statistics Agency (BPS), Indonesia suffered from fluctuating export value from textile and clothing products in the 2009-2013 period although it still had a positive annualized growth of 7.61%. The export value was US\$12.68 billion in 2013, or 8.5% from the total non-oil-and-gas export. The figure increased by 1.72% from US\$12.47 billion in 2012. In addition to increasing export value, the volume also increased steadily from 1.96 billion tons in 2012 to 2.10 tons in 2013, or an increase of 7.41%.

In the first two months of 2014, the export of Indonesian textile and clothing products showed an increase of 1.63% when compared to the same period year-on-year from US\$2.09 billion to US\$2.13 billion. The volume also increased by 9.09% from 324 tons in February and January 2013 to 353 million tons in the same period of 2014.

The Top 5 destinations for Indonesian textile and clothing products in 2013 were the United States with US\$4.1 billion and a share of 32.29% and Japan with US\$1.2 billion (9.33%) in the second place.

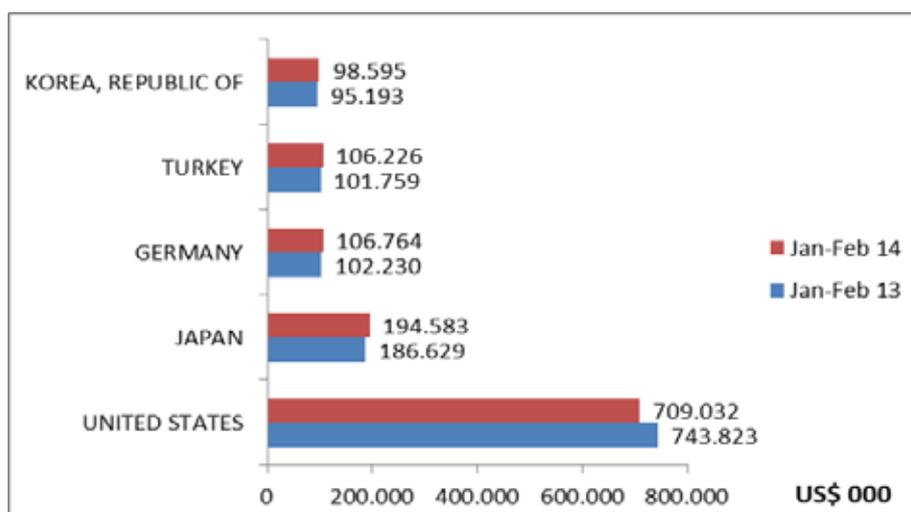
Turkey was third with US\$623 million (4.92%), Germany was fourth at US\$608 million (4.80%) and South Korea with US\$599 million (4.73%).

In the first two months of 2014, the Top 5 destinations remained the same consisting of the United States, Japan, Germany, Turkey and South Korea, as can be seen in the next Graph..

Indonesian export of textile and clothing to the said countries keep increasing year after year because in general the United States, the European Union and Japan are known for their latest fashion trend. Not to mention that Indonesia is one of the leading exporting countries in the ASEAN region.

In 2013, the Top 3 Indonesian textile and clothing export products were dominated by items grouped under HS5509 (yarn), HS 6110 (sweaters, pullovers, vests etc, knit or crocheted) and HS 6204 (women's or girls' suits, ensembles etc, not knit etc) with export values of US\$953 million, US\$924 million and US\$869 million respectively.

**Graph 2. Top 5 Destination Countries for Indonesian Textile and Clothing Products in January and February 2014**



Source: Central Statistics Agency (BPS)

### Trade associations

There are a number of international organizations related to textile and clothing products, such as the International Textile, Garment and Leather Workers Federation (ITGLWF), which is a federation of workers' unions with 217 affiliated organizations in 110 countries. In Indonesia, there are two workers' unions being affiliated with ITGLWF, F-Garteks SBSI and Serikat Pekerja Nasional. Meanwhile, the International Textile and Apparel Association (ITAA) is an organization for professionals and academics who have interests in textile and clothing sector. The association has some 800 members spread in numerous countries to guarantee the continuous exchange of values and knowledge on textile and clothing.

In Europe, which as main export destination for Indonesian textile and clothing products, the major business associations are the European Association of Fashion Retailers (AEDT), the European Man-made Fibres Association (CIRFS/BISA), and the European Apparel and Textile Organisation (Euratex).

Indonesia also has its own business association for textile and clothing, the Indonesian Textile Association (API) which covers both the upstream and downstream textile industries, consisting of producers of fibers and filaments, texturizers, weavers, mills and producers of woven, knitted and other textile materials. The association represents producers in dealing with the government to develop textile industry and trade in Indonesia. API claims that some 80% of global clothing brands have been made in Indonesia, showing the world's recognition on Indonesian textile products.

Currently, there are some 3,000 textile and clothing companies in Indonesia with half of them is export-oriented by producing well known brands such as Hugo Boss, Giorgio Armani, Guess, Mark and Spencer, Mango and Zara. Zara, for example, is made by PT Sri Rezeki Isman (Sritex) which produces clothing, blouses and shirts. The quality of fabric and clothing produced by Sritex has been recognized internationally. The Sukoharjo, Central Java-based largest textile company in Southeast Asia produces various global products.

Sritex has the capabilities to adapt with changing styles in a short time, once a week. Fashion products are considered ordinary, but not with military uniforms with special features such as bulletproof, fire retardant, anti-radiation and anti-infrared. So far at least 30 countries have procured their military uniforms from Sritex. Each country orders uniforms with various features. The United Arab Emirates and Kuwait, for example, have ordered anti-radiation uniform while Germany ordered anti-infrared uniform.

As for the Indonesian National Military (TNI). Sritex also produces uniform with great capabilities such as water resistant, fire retardant and even anti-mosquito. All the marvelous products were acquired through research and underwent special process to become uniform with high quality and outstanding performance. The composition between cotton and polyester is different for each uniform. Sophisticated machines are used in every production stage. Other than uniform, Sritex also produces other military equipment such as assault backpack which serves as float if the wearer is fallen into the sea, river or lake. Sritex also produces waterproof tents for the TNI as well as developing other military products.

Textile products manufactured by Sritex have met the North Atlantic Treaty Organization (NATO)'s standards allowing Sritex' products to be accepted by NATO country members,

Another major textile producer is PT Pan Brothers Tbk which is involved in industry apparel with its headquarters in Tangerang, Banten. Pan Brothers' products include cut and sewn knit garment such as polo shirts, golf shirts, track suits, sweat shirts and woven garment such as padded and light weight jackets, pants, shorts and casual pant using numerous types of materials. Established in 1990, the company and its subsidiaries have supplied their products to international brands such as Calvin Kelin, North Face, O'Neill, Guess, Spyder and Nikita. The company only markets its products for export destinations especially the United States, eastern Europe, Asia and Australia.



# LIST OF EXPORTERS



## SUMAPUTRA ANINDYA, PT

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D. K. I. Jakarta  
Phone : (62-21) 6128233  
Fax : (62-21) 6258145, 6109976, 6128360  
E-mail : marketing@sumaputra.net  
Website : www.sumaputra.net  
Products : Lampit of Rattan, Oth. Carpets & Oth. Textile Floor Coverings, Plaits & Similar Prod. of Oth. Materials

## MANGUL JAYA, PT

Jl. Cirebon No. 27, Menteng - 10310 D. K. I. Jakarta  
Phone : (62-21) 3908019 (hunting)  
Fax : (62-21) 31937309  
E-mail : mangul@cbn.net.id  
Products : Footwear with Uppers of Textile Materials

## UNION AJIDHARMA, PT

Graha Ajidharma, Jl. Danau Sunter Selatan Blok O IV  
Kav. 25-26 - Sunter Agung Podomo - 14350 D. K. I. Jakarta  
Phone : (62-21) 6511021, 6511684, 6509518  
Fax : (62-21) 6512911, 6510049, 6509524  
E-mail : gm@union.co.id, info@union.co.id  
Website : www.union.co.id  
Products : Detergents, Liquid, Liquid Washing Preparations, Including Bleaching For Retail Sale, Other Products And Preparations of organic Surface-Active, Preparation For The Treatment of Textile Material, Leather, Furskin or Other Material

## HADIPUTRA GEMILANG, PT

Jl. Karet Pendurenan, Gg. Sidik No. 93 - 12910 D. K. I. Jakarta  
Phone : (62-21) 5252885 (Hunting), 6493105, 6019172  
Fax : (62-21) 5221409, 6019184  
E-mail : kraton96@gmail.com, info@batikkraaton.com  
Website : www.batikkraaton.com  
Products : Batik, Saroong, Textile & Garment, Not Knitted or Crocheted

## INDO BHARAT RAYON, PT

Menara Batavia 16th Floor,  
Jl. K.H. Mas Mansyur Kav. 126 - 10220 D. K. I. Jakarta  
Phone : (62-21) 5722452  
Fax : (62-21) 5722417  
E-mail : ibrho@indoharatrasyon.com, jktoff@adityabirla.com, arun.khosla@adityabirla.com  
Website : www.indobharatrasyon.com  
Products : Textile & Garment, knitted or crocheted

## MEGAH SEMBADA INDUSTRIES, PT

Wisma Megah, Jl. Danau Sunter Barat Blok N2  
No. 2-3 - 14350 D. K. I. Jakarta  
Phone : (62-21) 6514250, 6514251, 6514252, 6514253, 651425  
Fax : (62-21) 6514241  
E-mail : marketing@megahsembada.com, export@megahsembada.com  
Website : www.megahsembada.com  
Products : Textile & Garment, knitted or crocheted

## GRAND TEXTILE INDUSTRY, PT

Wisma Argo Manunggal 15Th Floor, Jl. Gatot Subroto Kav. 22 -  
12930 D. K. I. Jakarta  
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E-mail : skurniady.gtx@argo.co.id, wrizal.gtx@argo.co.id, ftymngr@grandtex.co.id  
Website : www.grandtex.co.id  
Products : Textile & Garment, knitted or crocheted

## UNITEX Tbk, PT

Jl. Jend. Sudirman Kav. 9, Gelora Tanah Abang  
D. K. I. Jakarta  
Phone : (62-21) 7251925  
Fax : (62-21) 7251925  
E-mail : marketing@unitex.co.id, webmaster@unitex.co.id  
Website : www.unitex.co.id  
Products : Textile & Garment, knitted or crocheted

## PAN BROTHERS Tbk., PT

Jl. Siliwangi No. 178 Kel. Alamjaya,  
Kec. Jatiuwung - 15133 Banten  
Phone : (62-21) 5900718  
Fax : (62-21) 5900706, 5900717  
E-mail : iswardeni@pbrx.co.id, venny@pbrx.co.id, murali@pbrx.co.id, chin@pbrx.co.id  
Website : www.panbrotherstbk.com  
Products : Textile & Garment, Not Knitted or Crocheted

## BITRATEX INDUSTRIES, PT

Menara Kadin Indonesia 12th Floor, Jl. H.R. Rasuna Said Blok X-5 -  
Kav. 2 & 3 - 12950 D. K. I. Jakarta  
Phone : (62-21) 57903640  
Fax : (62-21) 57903641  
E-mail : bitrajkt@bitratex.com, emb@bitratex.com  
Website : www.bitratex.com  
Products : Multiple Yarn, Multiple Yarn of Artificial Staple Fibres, Multiple Yarn of Synthetic Staple Fibres, Oth. Single Yarn of Artificial Staple Fibres, Other Embroidery of Cotton, Other Embroidery of Man-made Fibres, Other Embroidery of Oth. Textile Materials, Single Yarn, Single Yarn of Artificial Staple Fibres, Single Yarn of Synthetic Staple Fibres, Yarn of Artificial Staple Fibres

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Website : www.kbri-canberra.org.au

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Website : www.indonesia-ottawa.org

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Email : atdag-jpn@kemendag.go.id  
Website : www.shoumubu.kbri.jp

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