

PROCESSED FOODS

FOODS PREP BY SWELL CEREAL,
CEREAL NESOI,
GRAIN FM

What Inside

Children need proper nutrition for their bodies to grow and develop well. However, currently there are various examples of unhealthy food with low nutrition available in the market but are being craved and loved by the children. Parents should be able to provide nutritious foods and low in sugar, such as cereals made from wheat and corn, for their children.

Advisor :
Gusmardi Bustami

Editor in Chief :
Indrasari Wisnu Wardana

Managing Editor :
RA. Marlana

Editors :
Sugiarti

Writer :
Karnaen Nafed

Design :
Karnaen Nafed

Editorial Addresses :
**DIRECTORATE GENERAL FOR
NATIONAL EXPORT DEVELOPMENT**
Ministry of Trade Republic of Indonesia
Jl. Ml. Ridwan Rais No. 5
Jakarta 10110 – Indonesia
Phone : +62 21 3858171
Fax : +62 21 23528652
Email : p2ie@kemendag.go.id
Website : <http://djpen.kemendag.go.id>

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Ministry of Trade Republic of Indonesia

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Dear Valued Readers,

Welcome to the January issue of Export News. As promised, we will continue to update you with the latest information on the best products of Indonesia. In this edition, we feature one of our best innovative creations in the field of Processed Foods.

The Directorate General of the National Export Development, Trade Ministry, always makes every effort to promote quality export products from Indonesia, through domestic and overseas promotion. We have numerous promotional media to introduce Indonesian products. One of them is Export News, an English-language bulletin.

In the January 2012 edition, Export News bulletin brings you the information on Cereal products. MULTIPLE healthy menu that can be used as a breakfast menu, bread, eggs, milk, fresh fruit is also diverse. But do you know in a study it, the menu cereal and milk are the best foods for breakfast. Cereal product is one of Indonesia's products that we will promote through the Export News bulletin. The bulletin will be distributed to all Indonesian representatives abroad.

Speaking about the pride of Indonesia Cereal products industry, recently we already have started to see and feel the progress. Along with that, we believe the increase the progress of the Cereal products industry will follow suit. Among Cereal products industry that are the pride of supplier of

Cereal is a new product in Indonesia, however, Indonesia has the raw materials that can be processed into cereal, brown rice, black rice, maize, sweet potatoes and cassava. Cereal product development has progressed, both in consumption and in the creativity of products derived from cereals other than wheat.

We hope that the information in this bulletin will be useful for our readers to get business partners in Indonesia. We wish you every success in your ventures to establish business relations with Indonesian business people.

Thank You



In *this* issue



To the best of our knowledge, the informations contained in this bulletin is accurate as of the date published. However, Directorate General of the National Export Development (DGNEDE), Ministry of Trade Republic of Indonesia, does not take the responsibility for actions readers may take based on the information contained herein. Readers should always conduct their own due diligence before entering into business ventures or other commercial arrangements. DGNEDE and Indonesian Trade Representatives worldwide can assist companies in these endeavors.

hot issue

There are wide varieties of healthy menu that can be served during breakfast, such as bread, egg, milk, and various fresh fruits. But do you know a study revealed that the best menu for breakfast are cereal and milk.

A breakfast cereal (or just cereal) can be defined as a food made from processed grains which is usually eaten cold, usually mixed with milk (such as cow's milk, soy milk, rice milk or almond milk), juice, water, or yoghurt, and sometimes fruit. Cereals, however, can also be eaten dry. Some companies promote their products for the health benefits from eating oat-based and high-fiber cereals. Cereals may be fortified with vitamins. In addition to the loose-type breakfast cereal, such as corn flake, there are also cereal bars which are essentially loose-type breakfasts cereal being pressed and baked into a bar shape.

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LIST PRODUCTS

- Oth prepared foods obtained of cereals or cereal products
- Rice preparations, including pre-cooked rice
- Prepared foods of mixtures of roasted or unroasted cereal flakes products
- Prepared foods obtained by the swelling or roasting of cereals/cereal products
- Bulgur wheat

Eating pattern in Indonesia, especially for breakfast, has changed. Some people are no longer dependent on rice and processed products for breakfast but have begun shifting to eat cereals. This shift has caused the number of cereal products available in the market to increase.

Many urbanites choose cereal for their breakfast. Unfortunately, many cereal products in the market contain very high sugar level but low on nutritional values. As a result, this would trigger fat accumulation in the body. Most of the time, people still feel hungry after eating cereal as it does not contain any significant fiber. It is better to choose cereals made of 100 percent whole wheat as a breakfast meal. In addition, oatmeal and fruit can also be added as parts of breakfast.

To supply the needs of your business can contact the company Indonesia on the last page of this edition.

INDONESIAN BREAKFAST CEREAL BARS PRODUCTS IN



WORLD IMPORT

WORLD IMPORT

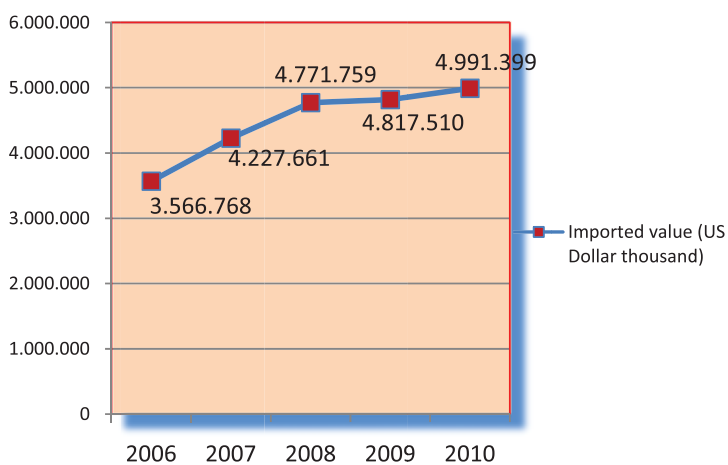
The imports of Breakfast Cereal and Cereal Bars in the world in the past 5 years from 2006 to 2010 showed a continuing increase. World cereal imports in 2006 was nearly US\$3.57 billion consisting of 100 countries. The Top 10 importing countries of Breakfast Cereals and Cereal Bars were: the United States, Canada, Italy, France, United Kingdom, Germany, Spain Ireland, Belgium and the Netherlands.



CEREAL & THE WORLD MARKET

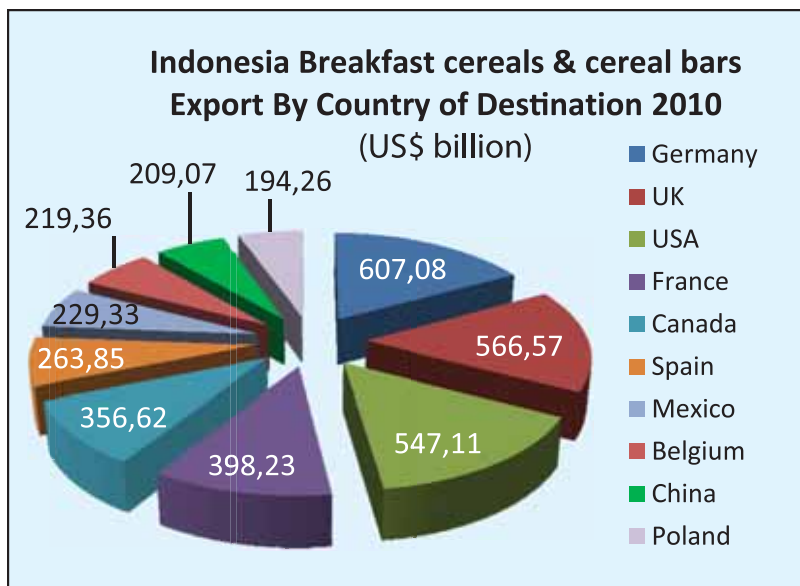


Breakfast cereals & cereal bars import by world 2006-2010



Sources : ITC calculations based on UN COMTRADE statistics.

In 2010, the breakdown of imported breakfast cereals and cereal bars by the Top 10 countries were as follow: the US imported US\$564.97 million or 11.32% of the world's total import, followed by Canada at the second place with an import of US\$404.22 million or 8.10%, and Italy was third with an import of US\$324 million or 6.49%. France was fourth importing US\$321.19 million or 6.43% and followed by UK forming the top half with US\$265.27 million or 5.31%



Sources : ITC calculations based on UN COMTRADE statistics.

In the sixth place was Germany with an import of US\$215.02 million or 4.31% of the world's total import followed by Spain at the seventh place importing US\$208.54 million or 4.18%, Ireland at eighth place with US\$172.58 million (3.46%), Belgium at the ninth place with US\$141.75 million (2.84%) and the Netherlands US\$110.94 million (2.22%).

Meanwhile, Indonesia was ranked 15th, importing breakfast cereals and cereal bars with a value of US\$13.19 million or 0.26% of the world's market in 2010.

In the Asia and Oceania region, the top importers of breakfast cereals and cereal bars included New Zealand which imported US\$48.45 million or 0.97% of the breakfast products followed by Hong Kong SAR at US\$34.20 million or 0.69% and China at US\$32.89 million or 0.66%. Among ASEAN countries, Thailand top the list with an import of breakfast cereals and cereal bars valued at US\$29.45 million or 0.59%, followed by Singapore at US\$27.61 or 0.55% and tailed closely by the Philippines at US\$27.53 million or 0.55% while Malaysia's import was US\$21.58 juta or 0.43%. Despite being a developed country, Japan's import was even lower than the four ASEAN countries at US\$17 million or 0.34% although still higher than Indonesia's import in 2010. Vietnam imported less than Indonesia in 2010, with an import of US\$5.36 million.

Imports of Asian countries in the 2007-2010 period showed an increasing trend, except for imports from New Zealand and Hong Kong which showed some fluctuation, as shown by ITC calculations based on UN Comtrade statistics. This means the market in Asia is prospective for breakfast cereals and cereal bars, as the consumption of these products has been increasing coupled with large number of population and growing economy. Increasing income per capita may induce a shift in the pattern of breakfast meals from traditional food to fast food and highly nutritious food.

WORLD EXPORT

Among the Top 10 exporters of breakfast cereals and cereal bars in 2010 were Germany with an export value of US\$607.08 million or 12.07% from the world's total export, UK was second exporting US\$566.57 million or 11.27%, and the US was third at US\$547.11 million or 10.88%.

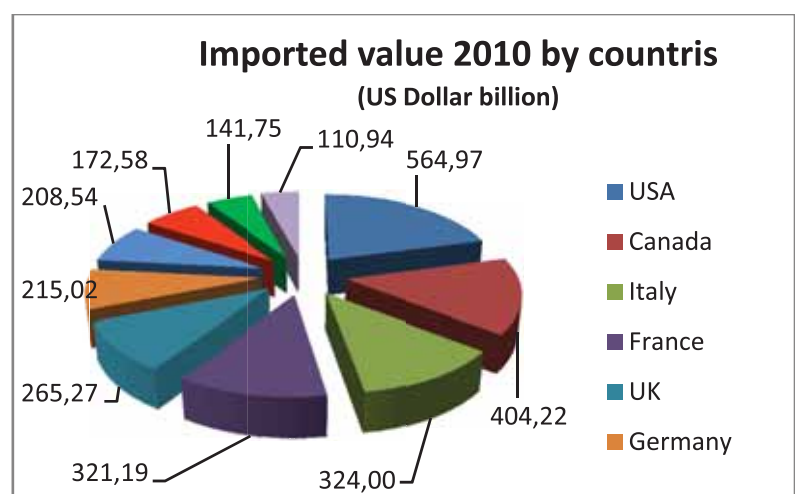
France was ranked fourth with an export of US\$398.23 million or 7.92%, followed by Canada at US\$356.62 million (7.09%), Spain exported US\$263.85 million (5.25%), Mexico sent US\$229.33 million (4.56%), Belgium shipped US\$ 219.36 million (4.36%), China delivered US\$209.07 million (4.16%) and Poland sold US\$194.26 million (3.86%).

It turned out to be that some countries exporting breakfast cereals and cereal bars to the world market is also importers of these products, as the following tables show. Germany, for example, is a major exporter of breakfast cereals and cereal bars but it still needs to import these products to cover both local and export market demands. Germany, however, still enjoyed a surplus of US\$392.06 million. Several other countries, on the other hand, suffered from deficit as their imports were larger than their exports, such as the United States, Canada and Italy with deficits of US\$17.86 million, US\$47.60 million and US\$231.84 million



respectively. It is safe to say that producers and exporters in these countries already have fixed market shares with their products are well recognized by consumers.

With an estimated population of approximately 313,847,465 as of July 2011, the United States has a huge prospect for breakfast cereals and cereal bar products. Many producing countries are trying to penetrate the US market, facing tight competition from each other and applying a variety of market penetration strategies.



Sources : ITC calculations based on UN COMTRADE statistics.

Market Review

Breakfast cereals & cereal bars Export By Country of Destination

No	Countries	Exported value (US 000)	Trend % (06-10)	Growth % (09-10)	Share % (2010)
		2010			
	All Countries	5,028,173	8.29	6.76	100
1	Germany	607,084	4.20	-3.07	12.07
2	UK	566,569	-0.03	-12.08	11.27
3	USA	547,110	10.18	5.76	10.88
4	France	398,233	-1.09	4.93	7.92
5	Canada	356,620	2.22	6.42	7.09
6	Spain	263,847	16.97	3.45	5.25
7	Mexico	229,325	24.35	25.73	4.56
8	Belgium	219,362	6.58	-9.10	4.36
9	China	209,068	19.88	33.70	4.16
10	Poland	194,257	23.12	12.58	3.86
11	Netherlands	131,622	6.04	3.61	2.62
12	Turkey	107,037	23.99	19.87	2.13
13	Italy	92,156	19.20	20.43	1.83
14	Chile	75,484	26.79	12.67	1.50
15	Indonesia	69,643	97.26	209.63	1.39

There are 60 countries supplying breakfast cereals and cereal bars to the US market with a total market value of US\$618.17 billion. Ten major supplier of these products to the US market are: Canada, Mexico, Spain, Dominican Republic, Korea,

Thailand, India, Germany, France and Brazil.

The main supplier countries of Breakfast Cereal and Cereal Bars supplied US\$595.90 billion of products or 90.40% of the total market for Breakfast Cereal and Cereal Bars products in the United States.





Breakfast cereals

Breakfast cereals & cereal bars Import By Country of Origin

No	Countries	Imported value (US 000)	Trend % (06-10)	Growth % (09-10)	Share % (2010)	Balance export-import
		2010				
	All Countries	4,991,299	8.36	3.61	100	36,874
6	Germany	215,017	10.87	-4.76	4.31	392,067
5	UK	265,268	9.77	-5.89	5.31	301,301
1	USA	564,970	10.65	10.90	11.32	-17,860
4	France	321,188	4.75	-10.02	6.43	77,045
2	Canada	404,224	11.94	1.27	8.10	-47,604
7	Spain	208,543	6.69	-6.53	4.18	55,304
16	Mexico	68,876	6.09	26.34	1.38	160,449
9	Belgium	141,749	3.57	-17.45	2.84	77,613
30	China	32,891	40.63	26.83	0.66	176,177
28	Poland	39,933	24.65	12.93	0.80	154,324
10	Netherlands	110,942	8.45	-15.73	2.22	20,680
31	Turkey	32,342	13.50	21.02	0.65	74,695
3	Italy	324,000	-0.38	15.47	6.49	-231,844
66	Chile	13,004	8.92	17.20	0.26	62,480
64	Indonesia	13,186	9.67	-5.51	0.26	56,457

Canada has a significant role in supplying Breakfast Cereal and Cereal Bars to the United States because at the same time Canada is also importing the products from the United States. The US is the largest supplying country of Breakfast Cereal and Cereal Bars products to the Canadian market. Other major supplying countries to Canada are the United Kingdom, Spain, the Netherlands, Mexico, Belgium, Chinese Taipei, Germany, Switzerland and China.

The United States and Canada are two complementarities in the world market for breakfast cereal & cereal bar products.

Similar situation is also found in Italy which imports Breakfast Cereal and Cereal Bars from 56 countries with the Top 10 are France, Spain, the United Kingdom, Germany, Austria, the Netherlands, Belgium, Romania, Switzerland and Czech Republic.

The 10 countries control 99.24% or US\$385.31 million of the total market for Breakfast Cereal and Cereal Bars in Italy. This leaves the remaining 46 countries to supply a mere US\$2.94 million or only 0.76% of market share.

LIST OF EXPORTERS



ARI INCOFOOD CORPORATION, PT

Jl. HOS Cokroaminoto No. 11, Sumatera Utara
Phone : (62-61) 4517139, (62-61) 4515214
Fax : -
Email :
Website :

DRAGON WALET PERKASA, PT

Jl. Muara No. 25 (Komp. Muara), Jawa Barat
Phone : (62-22) 5206017
Fax : -
Email :
Website :

KOBE & LINA FOOD, CV

Kawasan Industry Manis, Jl. Manis Raya
No. 15 – Banten
Phone : (62-21) 5918805, (62-21) 5918803
Fax : -
Email :
Website :

MUBAROKFOOD CIPTA DELICIA, CV

Jl. Sunan Muria No. 33, Jawa Tengah
Phone : (62-291) 432606, 432633,
(62-291) 446578
Fax : -
Email :
Website :

ANEKA FOOD TATARASA INDUSTRY, PT

Graha BIP 6rd Floor, Jl. Jend. Gatot Subroto
Kav. 23 Karet Semanggi – Jakarta
Phone : (62-21) 5229671, 5229672, 5229610,
5229670, (62-21) 5229610
Fax : -
Email :
Website :

SOPONYONO, CV

Jl. Kenjeran 303/ I, Surabaya - Jawa Timur
Phone : (62-31) 51501647, 51504985, 3816647,
3811741, (62-31) 51503280, 3817280
Fax : -
Email :
Website :

DOLPHIN, PT

Jl. Industri Raya III Blok AE Kav. 4 - 7 Desa Bunder
Kec. Cikupa
Phone : (62-21) 5902280, (62-21) 5902279,
59304246
Fax : -
Email :
Website :

MAYORA INDAH TBK, PT

Jl. Tomang Raya No. 21-23, Jakarta
Phone : (62-21) 5655315-9, (62-21) 5686570,
5655331
Fax : -
Email :
Website :



Australia (Canberra)

Indonesian Embassy 8, Darwin Avenue,
Yarralumia, Canberra Australia A.C.T. 2600
Phone : (02) - 62508654
Fax : (02) - 62730757
Email : atdag-aus@depdag.go.id,
tradesection@bigpond.com
Website: www.kbri-canberra.org.au

Belgium (Brussels)

Indonesian Mission to the European Union
Boulevard de la Woluwe 38
Brussels Belgium 1200
Phone : (322) - 7790915
Fax : (322) - 7728190
Email : atdag-blx@depdag.go.id,
atperindagbxl@chello.be

Canada (Ottawa)

Indonesian Embassy 55 Parkdale Avenue,
Ottawa, Ontario K1Y 1E5, Canada
Phone : 1 - (613) - 7241100 ext. 306
Fax : 1 - (613) - 7241105, 7244959
Email : atdag-can@depdag.go.id,
commerce@indonesia-ottawa.org
Website: www.indonesia-ottawa.org

China (Beijing)

Indonesian Embassy Dongzhimenwai Dajie
No. 4 Chaoyang District
Beijing China 100600
Phone : (00861) - 65324748,
65325488 - 3014
Fax : (00861) - 65325368
Email : atdag-chn@depdag.go.id,
moitbj@public3.bta.net.cn
Website: www.indonesia.cn,
www.indonesianembassy-china.com

Denmark (Copenhagen)

Indonesian Embassy Orehoj Alle 1,
2900 Hellerup,
Copenhagen Denmark
Phone : (45) - 39624422 ext. 215
Fax : (45) - 39624483
Email : atdag-dnk@depdag.go.id

Egypt (Cairo)

Indonesian Embassy 13, Aisha EL Temoria
St. Garden City P.O. BOX 1661 Cairo
Cairo Egypt
Phone : (20-2) - 7944698, 7947200/9
Fax : (20-2) - 7962495
Email : atdag-egy@depdag.go.id,
cairo-indag@hotmail.com,
atdagcairo@gmail.com

France

Indonesian Embassy 47-49, Rue Cortambert
Paris, France 75116
Phone : (33-1)-450302760 ext.418,
45044872
Fax : (33-1) - 45045032
Email : atdag-fra@depdag.go.id

Germany

Indonesian Embassy Lehter Strasse 16-17
D-10557 Berlin Germany 10557
Phone : (4930) - 4780700
Fax : (4930) - 47807209
Email : atdag-deu@depdag.go.id

India

Indonesian Embassy 50-A Chanakyapuri,
New Delhi India 110021
Phone : (09-111) - 6114100
Fax : (09-111) - 6885460, 6886763
Email : atdag-ind@depdag.go.id,
indoemb@nda.vsnl.net.in

Italy

Indonesian Embassy Via Campania, 55
Rome Italy 00187
Phone : (39-06) - 4200911, 42009168
Fax : (39-06) - 4880280, 42010428
Email : atdag-ita@depdag.go.id

Japan

Indonesian Embassy 5-2-9, Higashi Gotanda
Shinagawa-ku Tokyo Japan 1410022
Phone : (81-3) - 34414201, 34470596
Fax : (81-3) - 34471697
Email : atdag-jpn@depdag.go.id

Malaysia

Indonesian Embassy No. 233 Jalan Tun
Razak Kuala Lumpur, Malaysia 50400
Phone : (603) - 21164000, 21164067
Fax : (603) - 21167908, 21448407
Email : atdag-mys@depdag.go.id

Netherlands

Indonesian Embassy 8, Tobias Asserlaan
The Hague Netherlands 2517 KC
Phone : (31-70) - 310 8115
Fax : (31-70) - 364 3331
Email : atdag-nld@depdag.go.id,
atdag@indonesia.nl,
atdagdenhaag@yahoo.com

Philippines

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

Russia Federation

Indonesian Embassy Apt. 76, Entr. 3 Korovy
val 7, Moscow Russia Federation 117049
Phone : (7-495) - 2385281
Fax : (7-495) - 2385281
Email : atdag-rus@depdag.go.id,
atdag@sovintel.ru

Saudi Arabia

Indonesian Embassy Riyadh Diplomatic
Quarter P.O. Box 94343
Riyadh Saudi Arabia 11693
Phone : (966-1) - 4882800, 4882131 ext. 120
Fax : (966-1) - 4882966
Email : atdag-sau@depdag.go.id

Singapore

Indonesian Embassy 7 Chatsworth Road
Singapore 249761
Phone : (65) - 67375420, 68395458
Fax : (65) - 67375037, 67352027
Email : atdag-sgp@depdag.go.id

South Korea

Indonesian Embassy 55, Yoido-dong Young
deoung po-Ku Seoul South Korea
Phone : (0082-2) - 7835371 / 2, 7827750
Fax : (0082-2) - 7804280, 7837750
Email : atdag-kor@depdag.go.id

Spain

Indonesian Embassy 65, Calle de Agastia,
Madrid Spain 28043
Phone : (34-91) - 4130294
Fax : (34-91) - 4157792
Email : atdag-esp@depdag.go.id

Switzerland

Indonesian Mission on The United Nations
And Other International Organizations 16,
Rue de Saint Jean Geneva Switzerland 1203
Phone : (0041-22) - 3455733
Fax : (0041-22) - 3383397
Email : atdag-che@depdag.go.id

Thailand

Indonesian Embassy 600-602 Pitchburi
Road, Rajthevi P.O.Box 1318, Bangkok
Thailand 10400
Phone : (0066-2) - 2551264 ext. 123
Fax : (0066-2) - 2551264, 2551267
Email : atdag-tha@depdag.go.id

United Kingdom

Indonesian Embassy 38 Grosvenor Square,
London United Kingdom W1K2HW
Phone : (44-20) - 72909613, 74997881
Fax : (44-20) - 74957022
Email : atdag-gbr@depdag.go.id,
www.indonesiaembassy.org.uk

United States of America

Indonesian Embassy 2020 Massachusetts
Avenue, N.W. Washington DC United States
of America 20036
Phone : (202) - 7755350, 7755200 ext. 350
Fax : (202) - 7755354, 7755365
Email : atdag-usa@depdag.go.id,
commercial-tache@-embassyofindonesia.org

Indonesia Economic and Trade Office (KDEI)

Twinhead Bld 6 F No. 550 Rui Goang Road,
Neihu District, Taipei 114-China Taipei.
Phone : (886-2) 87526170 ext. 15
Fax : (886-2) 87423706
Email : ieto@ms8.hinet.net
Website : www.kdei-taipei.org

Indonesia Consulate General

127 - 129 Leighton Road , 6 - 8 Keswick
Street Causeway Bay, Hongkong
Phone : (852) 28904421, 28902481 (D)
Fax : (852) 28950139
Email : perindag@netvigator.com,
trade@indonesia-consulate.hk

Indonesian Trade Promotion Centre (ITPC)

WORLDWIDE

Barcelona

Calle Aribau 250 BJ, Lantai dasar 08006
Barcelona - Espana
Phone : +34 934111662
Fax : +34 934146188
Email : itpcbcn@yahoo.com
Website : -

Budapest

Bajcsy Zslnszky ut 12, 1st floor No. 101
Budapest 1051
Phone : (36-1) 3176382
Fax : (36-1) 2660572
Email : inatrade@itpc-bud.hu
Website : -

Busan

#103 Korea Express Building 1211-1
Choryang Dong, Dong-Gu Busan, South Korea
(Part Of 1st Fl, Korea Express Building)
Phone : 82-51 4411708
Fax : 82-51 4411629
Email : itpc-kor@depdag.go.id
Website : -

Chennai

Ispahani Center - 3rd floor 123/124,
Nungambakkan High Road, Chennai
India 600034
Phone : 91-44 42089196
Fax : 91-44 42089197
Email : itpcchennai@yahoo.com
Website : www.itpcchennai.com

Chicago

70 West Erie Street, 3rd Floor
Chicago, Illinois 60610 USA
Phone : +312 6402643
Fax : +312 6402648
Email : -
Website : -

Dubai

Al Masraf Tower 4th floor, # 403 Baniyas
Street Deira PO. Box 41664, Dubai UAE
Phone : (971-4) 2278544
Fax : (971-4) 2278545
Email : itpcdxb@emirates.net.ae
Website : www.itpcdxb.ae

Hamburg

Multi Buro Servise Glockengisserwall 1720095
Hamburg - Germany
Phone : (49-40) 33313333
Fax : (49-40) 33313377
Email : inatrade@itpchamburg.de
Website : -

Jeddah

The Consulate General of the Republic of
Indonesia Jeddah Al-Mualifin St. Al-Rehab
District / 5. Po Box 10, Jeddah 21411
Kingdom of Saudi Arabia
Phone : +966-2 6711271
Fax : +966-2 6730205
Email : itpc.jed09@gmail.com;
sahudi1@gmail.com
Website : -

Johanesburg

Suite 02/E1,2nd floor, Village Walk Sandton
PO. Box 2146, RSA Johanesburg X 9916
South Africa
Phone : (27-11) 8846240
Fax : (27-11) 8846242
Email : itpc@itpcjhb.ca.za
Website : -

Lagos

5, Anifowoshe Street, Victoria Island,
Lagos - Nigeria
Phone : +234-1 4619865/461 9860/2
Fax : +234-1 2613301
Email : -
Website : -

Los Angeles

3457, Wilshire Blvd, suite 101
Los Angeles, CA 90010, USA
Phone : (213) 3877041
Fax : (213) 3877047
Email : itpcl@sbcgloba.net;
itpc-usa@depdag.go.id
Website : www.itpcl.a.org

Lyon

L' European - 19 Bld Eugene Deruelle
69003 Lyon, France
Phone : +33 478 60 62 78
Fax : +33 478 60 63 14
Email : -
Website : -

Mexico City

Cenit Plaza Arquimedes, Office : 105
Arquimedes No. 130 Polanco, Del. Miguel
Hidalgo C. P 11570 Mexico, D. F
Phone : (52-55) 50836055 / 50836057
Fax : (52-55) 50836056
Email : -
Website : -

Milan

Via Vittor Pisani, 8 - 6^o Piano 20124
Milano (MI) Italia
Phone : +39 02 36598182
Fax : +39 02 36598191
Email : itpcmilan@live.it
Website : www.itpcmilan.com

Osaka

ITM-4-J-8, Asia and Pasific Trade Center
2-1-10 Nanko Kita, Suminoe-ku Osaka
Phone : (081-6) 66155350
Fax : (081-6) 66155351
Email : itpc@itpc.or.jp
Website : www.itpc.or.jp

Santiago

7th Floor WTC Building, Torre Sur Oficina 706,
Nueva Tajamar 481, Las Condes, Santiago, Chile
Phone : 56-2 4410494
Fax : 56-2 4410495
Email : itpc.santiago@123.cl
Website : www.itpcsantiago.cl

Sao Paulo

Edificia Park Lane Alameda Santos 1787
Conj III- 11 andar Cerqueira Cesar, Sao Paulo
Brazil 01419.002
Phone : (55-11) 32630472/ 35411413
Fax : (55-11) 32538126
Email : itpcsp@itpcsp.org
Website : www.itpcsp.org

Sydney

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

Vancouver

Georgia Business Centre 1400-1500 West
Georgia, Vancouver BC V6G 2Z6, Canada
Phone : 778 3734916/778 3734904
Fax : 604 7890078/604 6851520
Email : -
Website : -

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