

INDONESIAN *Coffee Beans*

HELP RECHARGING THE WORLD



What's Inside

Indonesia has various coffee varieties including the specialty varieties of Gayo, Java, Kintamani and Toraja. There is even Kopi Luwa, or Civet Coffee, which is dubbed as the world's most expensive coffee. Having the largest varieties of coffee in the world, Indonesia has more to offer to the world.

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Dear Valued Readers,

Welcome to the August 2013 edition of Export News where we will continue to present top export commodities from Indonesia. This time around we are bringing you quality coffee, in the hope that it will recharge your energy to reach your target in the rest of the year.

Indonesia is blessed with various types of coffees thanks to the diversity of its climate, land soil and environment which are important in growing coffee plants. A number of specialty coffees include the specialty varieties of Gayo, Kintamani, Toraja and Java. No wonder that even a computer program is named after Java, complete with its icon of a cup of coffee.

In 2012, Indonesia exported US\$1.24 billion made up 3.74% of the world's total export of coffee. Indonesia was the eighth largest exporter although it is the world's fourth largest coffee producer. This shows that there is still a huge potential to export more coffee to the world.

We do expect that this July edition of Export News could provide you with the information you need to buy black and white peppers from Indonesia. You are encouraged to directly contact the exporters we have listed in this edition.

Thank You



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hot issue

For most people, starting a day would not be complete without a sip of coffee. Dark, strong coffee can also recharge the energy after working all day or to start a long night. Coffee is one of the world's most widely consumed beverages.

Coffee brew is prepared from the roasted seeds of several species of an evergreen plant of the genus *Coffea*. The two most common coffee beans come from the highly regarded *Coffea arabica*, and the "robusta" form of the hardier *Coffea canephora*, which has a more bitter taste.

Coffee trees are cultivated in over 70 countries, primarily in equatorial Latin America, Southeast Asia and Africa. Once ripe, coffee "berries" are picked, processed, and dried to yield the seeds inside.



Hot Issue

The seeds are then roasted to varying degrees, depending on the desired flavor, before being ground and brewed to create coffee.

Cultivation of the coffee seed originated in Ethiopia, in approximately 850 A.D. The first cultivation outside of east Africa and Arabia was in Europe in 1616. Malabar in India first growing coffee in late 1600s while Java started even later in 1699. The Americas were first introduced to the plants around 1723. South America is now responsible for approximately 45% of the world's total coffee exports. Most of this coffee is grown in Brazil.

Coffee tree averages from 5 meters to 10 meters high. As the tree gets older, it branches less and less and bears more leaves and fruit. The tree typically begins to bear fruit 3–4 years after being planted, and continues to produce for 10–20 more years, depending on the type of plant and the area.

When the fruit is ripe, coffee growers have two options to harvest their coffee trees. The first option is to use “selective picking” method in which only the ripe fruits are picked while the second option is “strip-picking” where both ripe and unripe fruits are harvested.

There are also two methods of processing coffee berries, the wet and dry processing methods.

The “wet processing” is usually done in Central America and some parts of Africa. The seeds are removed from the berries before being fermented by soaking them in water for about two days. Soaking

the seeds will remove any pulp or sticky residue that are still attached to the seeds. The seeds are then washed and dried in the sun or using drying machines.

The “dry processing” method is cheaper and simpler, used for lower quality seeds in Brazil and much of Africa. Twigs and other foreign objects are separated from the berries and the fruit is then spread out in the sun on concrete or brick for 2 weeks to 3 weeks, turned regularly for even drying. The dried pulp is removed from the seeds afterward.

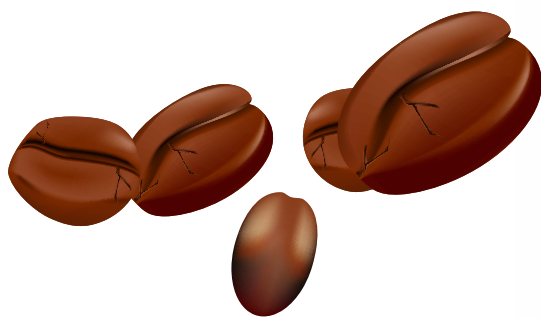
After processing has taken place, the husks are removed and the seeds are roasted, which gives them their varying brown color, and they can then be sorted for bagging.

About 80% of the coffee produced worldwide is Arabica and the remaining 20% is Robusta. Arabica seeds consist of 0.8-1.4% caffeine and Robusta seeds consist of 1.7-4% caffeine.

Coffee seeds are an important cash crop with many countries export the seeds to earn exchange earnings. The world's largest export destination for coffee is the United States which imported US\$6.75 billion worth of coffee in 2012, constituting 20.41% of the total exported coffee. Coffee consumption in the United States was 4.24 kg in 2011.

Coffee commodities are organized under the Harmonized System (HS) 0901 which is divided further into 10 sub-categories as can be seen in the table below:

NO.	HS	COMMODITY
1	0901111000	Arabica wib or robusta oib, not roasted not decaffeinated
2	0901212000	Coffee, roasted, not decaffeinated, ground
3	0901119000	Oth coffee,not roasted,not decaffeinated
4	0901222000	Coffee, roasted, decaffeinated, ground
5	0901211000	Coffee, roasted, not decaffeinated, unground
6	0901129000	Oth coffee, not roasted, decaffeinated
7	0901901000	Coffee husks and skins
8	0901121000	Arabica wib or robusta oib, not roasted decaffeinated
9	0901902000	Coffee substitutes containing coffee
10	0901221000	Coffee, roasted, decaffeinated, unground



INDONESIAN *Coffee Beans*

HELP RECHARGING THE WORLD

Indonesia is blessed with an ideal geographic location to grow coffee trees having the largest diversity of coffee seeds varieties. This is due to Indonesia being an archiplegic country providing various heights, climates, soil types and other factors that affect the taste of specific coffee planted in certain region. Famous coffee varieties from Indonesia include Sumatra Gayo, Sumatra Mandailing, Sumatra Lintang, Java, Bali Kintamani, Sulawesi Toraja, Flores Bajawa and Papua Wamena.

Java coffee is known to have a cocoa taste while Papuan coffee trees planted near fruit orchards tend to have fruity taste and the Aceh coffee is linked to a myth that it has the taste of marijuana.

Another specialty coffee from Indonesia is the Kopi Luwak, literally means the Civet Coffee. The coffee, dubbed as the world's most expensive coffee, has a

balanced acidity and thickness due to the chemical process inside a civet's stomach.

Coffee connoisseurs appreciated various specialty coffee from Indonesia such as Gayo and Kintamani as can be seen at the Specialty Coffee Association of America (SCAA) Exhibition recently.

Indonesia was represented by six coffee exporters in the SCA A Exhibition consisting of PT Kasus Mina Sejahtera, PT Coffindo, Bisnis Serbaguna Cooperative, CV. Bersama Harapan, PT. Gunung Lintang and PT. Sabani Internasional. Also participating were state-owned plantation company PT Perkebunan Nusantara (PTPN) XII, West Sumatra Plantation Agency, North Sumatra Plantation Agency, Papua Plantation Agency, the Indonesian Coffee Exporter Association (AEKI)



ARABICA COFFEE



ROBUSTA COFFEE

and the Indonesian Specialty Coffee Association (AKSI). The participants formed a joint Indonesian Pavillion.

Many coffee customers in the United States use the term “Java” to describe a high quality coffee. If they want to describe a high quality coffee from another country, let say Nicaragua, they will describe it as “Nicaragua Java”.

Coffee is one of Indonesia's top cash crops supporting more than 1.4 million of farmers in the country and contributed significant amount of foreign exchange. The Central Statistics Agency (BPS)'s data showed the export in 2011 worth some US\$1.03 billion and US\$1.24 billion in 2012.

According to data from the Agriculture Ministry's Plantation Directorate General, Indonesia produced 709,000 tons of coffee in 2011 consisting of 554,00 tons of Robusta and 155,000 tons of Arabica with some 446,000 tons are destined for export market. Indonesia is the world's fourth largest exporter of coffee after Brazil, Vietnam and Colombia.

AEKI said that in 1989 the domestic coffee consumption was 500 grams per capita per year, citing a survey held by the University of Indonesia.

In 2011, the association estimated that the consumption has reached 800 gram per capita per year. Several observers have called for the balanced supply of domestic consumption and export with the increased domestic consumption.

The current price of coffee is US\$3.6 per kilogram, lower compared to previous price which reached US\$7 per kilogram in the 2010-2011 period, which was the highest price in the past 34 years. The US\$3.6 price level is considered the normal price level, as it is similar to the price in the 2002-2009 period.



EXPORT

INDONESIAN *Coffee Beans*



The world export of coffee in the period of 2008-2012 showed a steady annual growth with an average of 15.44% although there was a 7.53% decrease from US\$36.15 billion in 2011 to US\$33.43 billion in 2012. The export value was US\$21.95 billion in 2008 but it slumped to US\$19.94 billion in the following year before picking up again with US\$24.29 billion in 2010.

Brazil is the world's largest coffee exporter with an export of US\$5.74 billion in 2012 constituting a market share of 17.17%, which was 28.48% lower than the export in 2011 of US\$8.02 billion. However, Brazil still enjoyed a healthy annual average growth of 14.92% in the period of 2008-2012.

The second largest producer was Vietnam US\$3.44 billion or 10.30% of the world's export in 2012, a 24.74% growth from



Market Review

US\$2.76 billion in 2011. This healthy growth defied the world's trend which saw many coffee producers suffered from a reduced export. In the five-year period between 2008 and 2012, Vietnam had an annual average growth of 15.53%.

In the third place was Germany with an export of US\$2.58 billion for a market share of 7.73%, followed by Colombia which exported US\$1.95 worth of coffee (5.85%) and Switzerland's shipment of US\$1.80 billion (5.40%) earned it the fifth place. Honduras was fifth with an export of US\$1.40 billion (4.21%) followed by Italy which sent abroad US\$1.30 billion (3.90%), Indonesia's export of US\$1.24 billion made up 3.74% of the world's total export and Belgium shipped US\$1.20 billion (3.61%). Ethiopia exported US\$1.18 billion for a market share of 3.55% to complete the world's Top 10 coffee exporters in 2012.

It is worth noting that Germany, Switzerland, Italy and Belgium are among the world's top coffee exporters although they are not coffee growers. Indonesia's export of US\$1.24 billion represented an increase of 20.53% from its export of US\$1.03 billion in 2011. In the period from January to May in 2013, the export was US\$439.07 million, increasing by 26.14% from US\$348.06 million worth of coffee being exported in the same period in 2012.

Indonesia showed a steady increase in coffee exports from US\$991.45 million although shipments dropped in 2009 and 2010 with a value of US\$824.01 million and US\$814.31 million respectively. Export picked up again in 2011 passing the US\$1 billion mark.

Most of Indonesia coffee export has always been consisted of the arabica or robusta, not roasted not decaffeinated sub-category. In 2012, the export of this sub-category reached US\$1.22 billion or 98.29% while the world's market share was only 70.09% at US\$23.43 billion.

The United States is Indonesia's major export destination, with a shipment of US\$331.22 million to the world's largest economy in 2012. The export

figure made up 26.51% of Indonesia's total export. Indonesia exported US\$274.55 million in 2011. Export, however, showed a slowing trend in the first five months of 2013 with US\$99.94 million or 22.76% of total export. The export decreased 21.24% from US\$126.90 million in the period of January-May in 2012.

Export to Germany, however, experienced a 293.09% increased from US\$12.23 million in the first five months of 2012 to US\$48.08 million in the same period in 2013 for a share of 10.95% from Indonesia's total export. The full year figure for 2012 was US\$116.92 million (9.36%) increasing from US\$70.51 million in 2011.

Japan was the third largest destination in the first five months in 2013 with US\$42.58 million for a share of 9.70% of total export. Export to Japan decreased by 28.17% from US\$59.28 million in the same period in the previous year. Indonesia exported US\$145.74 million (11.66%) to Japan in 2012, which was lower than the export in 2011 at US\$174.72 million.



IMPORTS

INDONESIAN *Coffee Beans*



The world imported US\$33.09 billion worth of coffee in 2012, an 8.69% decrease from US\$36.24 billion in the previous year. All in all, however, the annual average growth for the period of 2008-2012 was still healthy at 15.15%. The import was US\$21.92 billion in 2008 but dropped to US\$20.15 billion in the following year before climbing up again in 2010 with US\$23.96 billion.

The United States is the world's largest importer of coffee with an annual average of 17.69% in the 2008-2012 period. The United States imported US\$6.75 billion worth of coffee in 2012, a market share of 20.41% from the world's total import. The import in 2012 was 13.88% lower than the figure in 2011 of US\$7.84 billion.

Germany, the world's third largest exporter is also the world's second largest importer. The country imported 13.94% of the total import at US\$4.61 billion in 2012, or 12.46% lower than US\$5.26 billion it exported in 2011.

France was third with US\$2.34 billion (7.08%), world's seventh largest export is also its fourth largest importer with US\$1.88 billion (5.68%) while Japan imported US\$1.69 billion worth of coffee for a market share of 5.14% at the fifth place.

Canada imported US\$1.41 billion or a market share of 4.26% followed by Belgium, the world's ninth largest exporter, which imported US\$1.39 billion (4.20%), Spain imported US\$944.11 million (2.85%), the Netherlands bought US\$849.82 million (2.57%) and the United Kingdom completed the Top 10 of coffee importers with US\$846.49 million (2.56%).

Indonesia imported US\$117.19 million for a market share of 0.35% in 2012 at the 37th place.

LIST OF EXPORTERS

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nedcofeeindonesia@nedcoffeeindonesia.co.id
Website : www.nedcoffeeindonesia.co.id
Products: *Robusta Coffee*

MENACOM LTD, PT

Jl. Turi No. 22-24, North Sumatra 20217, Indonesia
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Fax : (62-61) 7867977, 8451625
Email : adm@ptmenacom.com
asulaiman@ptmenacom.com
mira.sulaiman@gmail.com
Website : www.ptmenacom.com
Products: *Coffee Beans*

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Jakarta 12130, Indonesia
Phone : (62-21) 73992211
Fax : (62-21) 72996085
Email : marketing@drindonesia.com
Website : www.drindonesia.com
Products: *Coffee, Tea*

SARI HASIL PUTERA, PT

Jl. Sungai Poso Lr. 77 No. 1,
South Sulawesi, Indonesia
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Fax : (62-411) 3612619
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Products: *Coffee Beans*

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bumi-karya@idola.net.id
bumi_ks@hotmail.com
Products: *Arabica Coffee, Coffee Beans,
Robusta Coffee*

SETIA JAYA, CV

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Aceh, Indonesia
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Website : www.kopibali.com
Products: *Coffee Powder*



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Indonesian Embassy 47-49, Rue Cortambert
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Fax. : (33-1) - 45045032
Email : atdag-fra@kemendag.go.id

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Fax. : (603) - 21167908, 21448407
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LOS ANGELES

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