

Women's and Girls' Overcoats

Indonesian potential commodity to underpin
the development of local garment industry

What's Inside

Fashion industry keeps growing rapidly in Indonesia. Amongst the potential products are women's and girls' overcoats. Furthermore, in this edition, we also describe the development of textile and textile products in general as part of garment industry in Indonesia.

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FROM EDITOR'S DESK

Dear Valued Readers,

Garment or Textile and Textile Products (TTP) is one of the foremost industrial sectors in Indonesia. This industry commenced many years ago. Thus, there is no wonder that this sector has experienced various conditions, both challenging and beneficial. Eventually, Indonesian TTP sector has now exhibited some achievements such as high export performance.

One of the potential commodities produced by garment industry in Indonesia is women's and girls' overcoats. Since the export value of this commodity is significant, Indonesia is acknowledged as one of the Top 5 producers of women's and girls' overcoats in the world. This achievement should be continuously underpinned by the Indonesian government by encouraging local entrepreneurs to keep manufacturing good products, which fulfill the requirements of international standards. Moreover, to maintain existing markets as well as penetrate new potential markets, local producers must have the creativity to produce innovative products for global consumers.

This May edition of Export News discusses the general development of Indonesian TTP sector with a focus on the export performance of goods categorized on the Harmonized System (HS) Code 6102. We also visit a number of production centers for women's and girls' overcoats in Indonesia. This edition also informs the challenges and benefits for Indonesian TTP sector that are generated by the latest global economic recession in a number of major countries in America and Europe. Both the challenges and benefits should be viewed as motivations to further enhance export performance and gain new opportunities to explore and win new markets.

To sum up, with the experience of more than eight decades, all stakeholders in the TTP sector are likely to have sufficient knowledge and capabilities to overcome various obstacles and challenges. Instead of blaming on the condition, the stakeholders are expected to transform those challenges and obstacles to become opportunities to be exploited. This kind of capabilities is the key success to sustainably develop the Indonesian TTP sector in and make this country as the most attractive place for foreign buyers and investors.

Thank You

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INDONESIAN GARMENT AND BENEFITTED BY THE GLOBAL ECONOMIC

After the latest global economic recession which took place in many, developed countries, many developing countries have felt the impact in the context of international trade. The export values to those major countries tend to decline. On the contrary, the global economic recession also benefits the developing countries in some extent. A number of companies in Europe has ceased production activities and dismissed the employees. Instead of bankrupt, those companies plan to relocate their business abroad with the consideration of lower production cost, and Asia has become the most attractive region including Indonesia. One of the sectors that will conduct this strategy is garment or Textile and Textile Products (TTP). Thus, the local entrepreneurs should be able to grab the business opportunities in an industry which started since 1929 in Indonesia.

Chairman of the Indonesian Textile Association (API), Ade Sudrajat, revealed that a number of European and American business owners have visited Indonesia in the first half of 2013 to establish business cooperation. This could be profitable for Indonesian companies to build cooperation with foreign companies and enlarge their businesses. The local companies can also learn how to produce more acceptable products for global consumers and how to penetrate new markets.

For the government, this condition is also beneficial to increase the values of exported textile and textile products, and support the vision to elevate Indonesia as the most credible garment producer in the world. Ade reveals that 54 percent of

INDONESIAN

TEXTILE INDUSTRY: RECESSION

Indonesian TTP export was shipped to the United States, 18 percent to Europe and 15 percent to Japan. In the US, Indonesia is called as the hidden secret in Asia, because American buyers argue that Indonesian garment makers are very competitive yet not well-acknowledged in the US.

Sukabumi, a city in West Java, is the most attractive place for foreign garment investors, since this city provides competent human resources. Other prospective cities are Bandung and Purwakarta, also in West Java, as well as Surakarta, Sukoharjo, Karanganyar, and Ungaran in Central Java. These cities have applied integrated system by building modern technology. Some factories have used the hanger system, which is imported from Switzerland, to upgrade the productivity. Hence, the Indonesian business players in TTP sector can expand their markets in America and Europe as well as in new non-traditional markets such as Africa, Latin America and Middle East.

Learning from cases in other developing nations where foreign investors decided to close their companies, it is important for Indonesian entrepreneurs to put forward the basic rights of their workers and apply environment-friendly working mechanism. Due to increasing consciousness of international consumers, low priority towards these two issues is the common consideration for foreign investors from major countries to shut down their businesses in developing countries. Ade further emphasized that bad management of textile industry is unacceptable.

ASEAN TEX 2013

AND STREETWARE ASIA 2013

ASEAN Tex 2013 and Streetware Asia 2013 will be organized on Nov. 14-16, 2013 at the Jakarta Convention Center. In addition to API, this event is also supported by the ASEAN Federation of Textile (AFTEX), the Indonesian Association of Garment and Accessories Suppliers (APGAI), and the Association of Indonesian Garment Producers (APGI). In addition to exhibition, the organizing committee is also arranging symposiums, business forums, discussion panels and other related activities.

ASEAN Tex 2013 focuses on textile products like fabrics and supporting elements such as buttons and zippers. Meanwhile, Streetware Asia 2013 will display urban fashion products including fashion accessories such as bags, shoes, hats, eye glasses. Other ancillary service on textile and garment industry, such as production machines and after-sales service, will also participate in this exhibition. ASEAN Tex 2013 and Streetware Asia 2013 are business-to-business (B2B) events which will bring together Indonesian exporters and foreign buyers to carry out business deals and transactions.



SHORT HISTORY

Looking back at a glance to the history, the Indonesian TTP sector began to grow in 1970 with the influx of investment from Japan. However, the development was still sluggish. The rapid and steady movement was began in 1986, with the supporting factors were: 1) conducive business climate such as effective regulations with non-oil and gas export-orientation, and 2) the capability to meet the high standard of qualified product for high-class consumers in international fashion markets. After passing through the survival era in 1998 to 2002, this sector experienced the outstanding rehabilitation and normalization period until 2006. The business players along with the government tried to overcome two difficulties that took place: financial problem and unfavorable business climate.

Therefore, in 2007, the Indonesian government conducted a restructuring program by applying machinery system in TTP industry in Indonesia. By improving the technology used in textile and garment industry, it was indicated that there were progresses in terms of mass distribution. The local entrepreneurs started learning the ready-to-wear business to meet the market demand of ready-

to-wear garments. Moreover, the development of the TTP industry in Indonesia was benefited by the current situation at that moment, in which Indonesian women started to have more opportunities to do many things outdoor and to earn more money at workplaces. To support their outdoor activities, they needed appropriate suits to upgrade their outlooks, particularly for working women.

Currently there are five biggest industrial areas for Indonesia's overcoats products: Jakarta, Riau, Central Java, Bali and East Java. Being the capital city of Indonesia, there is no wonder that Jakarta constitutes the center for garment industry including women's and girls' overcoats.

Jakarta has become the center of fashion industry where exporters or designers reside and create their products. One of the famous fashion events in the city is the Jakarta Fashion Week, which is annually organized by Femina Groups since 2011. This event is managed to transform Jakarta as one of the fashion centers in the world. The organizing of Jakarta Fashion Week is one of the indicators which illustrates that this sector is influential for Indonesian economy development. This sector also employs a great number of workers.

SHORT HISTORY



WOMEN'S AND GIRLS' OVERCOATS PARTS OF INDONESIA'S PROMISING FASHION INDUSTRY

The trend of Indonesian export for the goods categorized on the Harmonized System (HS) Code 6102, women's or girls' overcoats, knitted or crocheted, kept increasing from 2008 to 2011. This category is further divided into four sub-groups:

the world's fourth biggest exporter for HS 6102 commodities after China, Germany and Vietnam, and exceeding the export values from Bangladesh, the Netherlands, Hong Kong, Italy, United Kingdom and France.

**Indonesian Export of Women's or Girl's Overcoats Etc (Knit or Crochet) to the World
By Commodity (HS 10)**

NO.	HS	COMMODITY
1	6102200000	Female's wear of cotton, knitted/crocheted other than of head 6104
2	6102900000	Female's wear of other textile materials, knitted/crocheted other than of head 6104
3	6102100000	Female's wear of wool/fine animal hair knitted/crocheted other than of head 6104
4	6102300000	Female's wear of man-made fibres, knitted/crocheted other than of head 6104

In 2012, there was a slight decrease due to global economic recession in some developed countries. In general, the decreasing trends also occurred in many other countries. However, Indonesia was still

With a market share of 27.75%, China topped the list in 2011 with an export of US\$748.91 while Germany's export of HS 6102 goods was US\$305.39 million with a market share of 11.31% and Vietnam

**Export of Women's or Girl's Overcoats Etc, Knit or Crochet
to the World by Country Destination**

No	Countries	Exported value (US Dollar thousand)				
		2007	2008	2009	2010	2011
1	China	389,476	479,106	396,067	538,693	748,912
2	Germany	154,307	220,110	227,240	235,421	305,389
3	Viet Nam	131,041	148,222	125,740	149,734	236,752
4	Indonesia	82,853	122,017	136,913	159,610	227,397
5	Bangladesh	5,888	72,940	70,009	103,692	148,910
6	Netherlands	52,425	62,023	82,108	90,565	134,820
7	Hong Kong, China	93,910	139,156	126,793	144,425	114,371
8	Italy	60,404	77,494	73,543	81,461	99,610
9	United Kingdom	46,370	51,412	50,443	52,675	59,872
10	France	59,193	73,291	56,111	51,725	56,625

Sources : ITC calculations based on UN COMTRADE statistics.

Market Review

exported US\$236.75 million for 8.77% of market share. In 2011, Indonesia exported US\$227.39 million of HS 6102 goods for a market share of 8.43%. The 2011's figure was a 42.47% increase from export in 2010 with a value of US\$159.61 million. In the five-year period from 2007 to 2011, Indonesian export of women's and girl's coats recorded an average annual growth of 25.71%.

In the first 11 months of 2012, Indonesia exported US\$114.56 million to the world, suffering from a contraction of 47% from the export figure in the same period in 2010 of US\$216.12 million. The full year figure in 2011 was US\$227.39 million with a healthy annual average growth of 25.71% in the 2007-2011 period.

The 10 biggest markets for Indonesian women's and girls' overcoats were the United States, Germany, the Netherlands, Russia, Canada, the United Kingdom, South Korea, China, Spain and France.

In general, Indonesia's performance under HS 6102 was slowing down in the first 11 months of 2012 when compared to the same period in 2011, possibly due to several austerity measures taken by the developed countries which affected their purchasing power. The export to the United States, for example, suffered from a 43.91% contraction from US\$133.32 million in the first 11 months of 2011 to US\$74.78 million in the same period in 2012. Indonesian export to the United States for the full year of 2011 was US\$136.54 million. Indonesia enjoyed a strong annual average growth of 22.74% in its export to the United States in the 2007-2011 period.

BENEFICIAL ENVIRONMENT

Despite having a rather dismal performance in 2012, the TTP sector in Indonesia has received strong supports from both the government and private sectors.

In the government side, the Directorate General of National Export Development (DGNED) at the Ministry of Trade, takes the responsibility to promote Indonesian non-oil-and-gas commodities abroad and to increase the export value year by year.

This sector is also supported by financial institutions and industry groups. Financial institutions or banks

are offering loan for small and medium enterprises (SMEs) to assist the exporters coping with financial needs of their businesses.

On the other side, industry groups such as the Indonesian Chambers of Commerce and Industry (KADIN) also plays a useful role in accurately mapping the sector's development direction, such as by selecting potential markets and determining the appropriate strategy to enter potential markets. KADIN is convinced that the TTP industry will always be the biggest contributor to Indonesian non-oil-and-gas exports, since there are high global demands and appreciations toward Indonesian textile products.

Another supportive institution is the Indonesian Textile Association (API), which collects the data of all business players in TTP sector and builds networks among the members. API particularly helps local exporters to promote their products by delivering information about exhibitions, seminars and other trade events that are related with TTP industry. API also provides useful data for exporters such as prospective international markets to enter. In addition to workers availability, the huge number of Indonesian population has also attracted the opportunities of science- and technology-based industry. Thus, many foreign investors come to Indonesia to expand their companies. As a consequence, the Indonesian government has an obligation to improve the infrastructure and supporting services such as highways, ports, transportation, warehouses, energy, clean water, telecommunications and many others. Improved conditions of those infrastructure is the basic foundation that supports the development of TTP industry in Indonesia.

Furthermore, as the realization of the government's commitment to continuously support the development of garment sector, a lot of trade centers, shopping malls, hypermarts and department stores have been built in order to facilitate producers for business transactions and displaying the products. Most of the space is often used for fashion parades, exhibitions and conventions. Hence, this kind of facility will enable producers or designers to introduce, promote and market their products in a more practical and economical way.

BINONG JATI KNITTING INDUSTRIAL CENTER



Binong Jati Knitting Industrial Center in Bandung, West Java, is an area where hundreds of houses produce thousands of knitting products each month. Those knitted products are regularly distributed to almost all cities in Indonesia such as Jakarta, Medan, Palembang and Lombok. Many of knitting products being displayed at shopping malls, factory outlets and department stores are supplied from the Binong Jati cluster. Binong Jati is a famous knitting center and has become one of tourism destinations in Bandung.

The establishment of Binong Jati as a knitting center by the Bandung city administration is an effort to implement city branding strategy. This strategy is important to guide and facilitate consumers or buyers in finding the products they look for. Many cities in other countries also conduct similar strategy where each city has a particular, specific product. This strategy is commonly called the One Village, One Product (OVOP).

It is clear the the city administration and business players in Bandung have had clear visions and missions, synergistic purposes, same style and dreams in building Binong Jati with a certain brand image. By branding Binong Jati as a knitting center, it is expected Bandung can attract more buyers from both domestic and international markets to come and purchase the products or do other business transactions.

From another perspective, Bandung's branding strategy is also one of the concrete strategies to deal with the implication of free trade agreements

(FTAs) between Indonesia and its trading partners. The implementation of FTAs have brought about increasing number of foreign products in Indonesian markets. In order to keep the market share, the government encourages local producers to improve the quality of their products while at the same time still offering them at affordable prices.

The huge numbers of Small Medium Enterprises (SMEs), in Binong Jati for instance, benefits Indonesia in terms of micro economy. In practice, SMEs provide job opportunities for residents to earn money. In other words, their existence has become the foundation to strengthen the residents' prosperity by providing them with a source of income. Continuous production also makes it possible for producers and workers to, among other things, improve their creativity, maintain local culture and increase the capability to manage an organization.

On the other hand, the SMEs' capabilities to supply good products provide an opportunity for DGNED, as a government entity, to enhance the export value of non-oil-and-gas sector. Therefore, sustainable assistance from related institution – such as the government, financial intermediaries and business associations – is important to achieve the mission to generate SMEs as a reliable economic foundation to increase domestic wealth on one hand and export value on the other hand. Undoubtedly, Binong Jati Knitting Industrial Center is a credible place for international buyers to find women's and girls' overcoat and other females' outfits.

SOURCES:

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- Kompas Daily: www.kompas.com
- Tempo: www.tempointeraktif.com
- Kontan Online: www.kontan.co.id
- Neraca: www.neraca.co.id
- Swa Online: www.swa.co.id
- Wikipedia: www.wikipedia.org

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