



Indonesian *Cacao* to become the world's second largest producers



WHAT'S INSIDE

Cocoa is one of the mainstay commodities of plantation whose role is quite important for the Indonesian economy, especially as a provider of employment, sources of income and foreign exchange.

editor's desk



Dear valuable readers,

Cocoa (cocoa), or *Theobroma cacao* in latin, is a tree plant originating from South America. This plant seeds produced processed products known as chocolate. Chocolate has many health and psychological benefits. One of the benefits is to lower blood pressure, if consumed regularly. Chocolate contains theobromine, fenetilamina, and anandamida which belongs to the type of alkaloids that can increase serotonin hormone levels into the brain. In addition, certain types of chocolate (eg, dark chocolate) contain high levels of antioxidants that are useful for counteracting free radicals.

Cocoa (*Theobroma cacao* L.) is one of the mainstay commodities of plantation whose role is quite important for the Indonesian economy, especially as a provider of employment, sources of income and foreign exchange. Not only that, cocoa also plays a role in encouraging regional development and agro-industry development. In 2002, cocoa plantation has provided employment and income sources

for approximately 900 thousand heads of farm families mostly located in Eastern Indonesia (KTI) and contributed the largest foreign exchange to the three plantation sub-sectors after rubber and palm oil valued at US \$ \$ 701 million.

In this Export News edition, bulletin will reviews the information about the Indonesian cocoa products and prospects that are increasingly in demand by world markets and efforts to increase the sector's exports in this challenging globalization era.

Finally, although the information contained in this Export News is very simple, we hope it may be useful for the readers.

Thank You

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Promotion Center (ITPC)**



HOT ISSUE

Indonesian *Cacao* to become the world's second largest producers



Indonesia aims to become the world's second largest cocoa producer. Indonesia's cocoa production will be increased to 1.5 million tons per year. This was stated in the Sulawesi Regional Development Meeting led by Vice President Jusuf Kalla (JK) in Makassar, South Sulawesi. According to Jusuf Kalla, Sulawesi is the largest cocoa producer with a value of 70% of the national scale. The government decided to make a rejuvenation of the people's plantation.

The cost of rejuvenating cocoa plantations in Sulawesi will use the citizen's business credit (KUR) which is expected to encourage productivity. In addition, the provision of KUR will ease the cost of the state budget so that funds can be allocated APBN for seeds.

Based on data from the Indonesian Cocoa Plantation Statistics report 2015-2017 released by the Directorate General of Plantation of the Ministry of Agriculture said cocoa donated the

country's foreign exchange through exports of 1.15 billion US dollars in 2013, rose to 1.244 billion US dollars in 2014, 1.307 billion US dollars in 2015, and 895 million US dollars through September 2016.

Indonesia's cocoa production tends to fluctuate from 720,862 tons in 2013, 728,414 tons in 2014, then drop to 593,331 tons in 2015, and increase to 656,817 tons in 2016, and is predicted to reach 688,345 tons in 2017 but this is still far from the potential that can be reach Indonesia with an area of 1.7 million hectares that should be able to achieve production above 1 million tons. However, cocoa commodity is still able to contribute foreign exchange up to US \$ 1.05 billion last year.

Based on that data matter, it would be necessary to establish a BPDP- Cocoa Plantation Fund Management Agency because today many of the community's plantation are old and lack of production. The government is expected to be concerned not only with the interests of oil palm, and that it should be remembered that cocoa is a crop that is more than 95 percent owned by the community. So it will need much support for the community.

Not only that, through the BPDP- Cocoa, government may set citations on commodity exports whose funds can be used directly for human resource development, research and development, plantation promotion, and rejuvenation. This policy has been applied to oil palm and should be applicable to cocoa commodities.

In the future, cocoa farmers are expected to be able to market premium cocoa beans at more attractive prices and get added value from processed products.

MARKET REVIEW



Indonesia's Trade Performance of Cacao

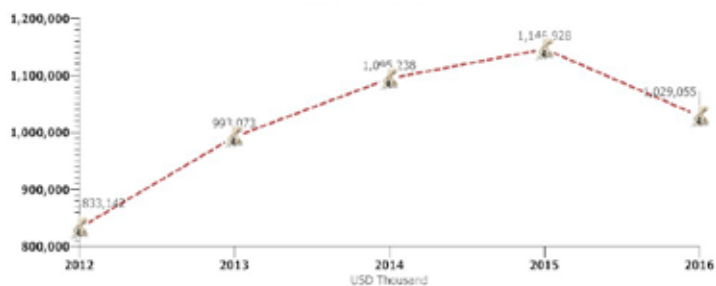
Since 2004, the cocoa plantation area is over one million hectares and continues to increase until 2012 and 2012 is the highest area during the period of 1980-2015. According to its cultivation status, cocoa plantations in Indonesia are divided into three, namely Perkebunan Rakyat (PR), Perkebunan Besar Negara (PBN) and Private Plantations (PBS). From these three business status, the increase of the area is quite high in the PR where in the period 1980-2011 the area increased by 18.28% per year, the NER of 3.86% per year and PBS 7.20% per year. The decrease of national cocoa area in the period 2012-2016 is due to the PBN area decreased by 16.52% and PBS decreased by 8.38% while the area of public relations increased 0.52% per year. In terms of contribution, Indonesia's cocoa area in the 1980-2016 period was dominated by PR with an average contribution of 91.30% while the NER of 5.71% and PBS 6.18% of the total area of Indonesian cocoa. In the period of 2012-2016 (last five years), the contribution of public cocoa area increased slightly to 97.42% while the NER of 1.41 and PBS 1.92% of the total cocoa area in Indonesia. In 2009-2011 the Ministry of Agriculture through the Directorate General of Plantation launched the National Movement Program for Increasing Production and Quality of Cocoa (Gernas Kakao). This program refers to the results of field identification in 2008 that approximately 70,000 ha with old crop conditions, damaged, unproductive, and exposed to attacks of pests and diseases with severe levels of attacks that need to be rejuvenated. In addition, there are 235,000 ha of cocoa farms with less productive crops and are exposed to pest and disease attacks with moderate levels of rehabilitation, and 145,000 ha of cocoa plantations with untreated and under-maintenance crops. Therefore, Gernas Kakao program is done through 3 methods of rejuvenation, rehabilitation and intensification.

During 2012 to 2016, Indonesia's cocoa trade reached the highest sales value in 2015 with an export value of USD 1.14 million. Although overall during that period the value of Indonesia's exports fluctuated. In international trade, Indonesian cocoa has a comparative advantage in cocoa beans, cacao paste, cocoa butter and cocoa powder. Of the four cocoa products exported by Indonesia, cocoa is in the form of the seed that has the highest competitiveness, while the cocoa butter has the lowest competitiveness. On the other hand, we have internal competitiveness for other exported commodities, Indonesia's cocoa competitiveness in the world is still low compared to other cocoa exporter countries in cocoa beans and processed markets.

For the top 5 Indonesia cocoa export by destination countries can be seen in the following table:

No.	Country	Value 2016	Share (%)
1	United States	244,144	23.73
2	Malaysia	209,526	20.36
3	Netherlands	39,585	3.85
4	China	49,756	4.84
5	Canada	44,301	4.30

Indonesia Export of Cocoa to World 2012 - 2016



MARKET REVIEW

The Indonesia's production of cocoa beans and derivatives is exported to various countries. Most are absorbed by Malaysia as a raw material for the global chocolate food industry.

According to the Indonesian Cocoa Association (ASKINDO), Malaysia absorbs quite a lot of Indonesian cocoa products. Processed chocolate and chocolate industries in Malaysia grow very rapidly. Askindo noted in 2016 the total export of Indonesian cocoa products to Malaysia reached 74,000 tons or about 32% sent to the surrounding country.

From the quality of the results, cocoa farmers in Sulawesi generally understand about fermentation. However, farmers in Sumatra, Bali and Java have relatively little knowledge of fermentation, except those who have become partners of cocoa processing companies.

Only in some areas, cocoa farmers are threatened with conversion. For example, in Sumatra, in some districts, farmers began to change old cacao plants with palm. Of course consideration is the economic reason. Unlike palm oil, cocoa trading still opens up speculation space

No.	Country	Production (Ton)						Share (%)	Cumulative Share
		2012	2013	2014	2015*	2016**	Average		
1	Sulteng	144.358	149.071	161.469	153.033	175.252	156.637	21,69	21,69
2	Sulsel	146.840	117.672	118.329	100.807	115.326	119.795	16,59	38,27
3	Sultra	122.960	120.243	125.079	105.434	120.421	118.827	16,45	54,72
4	Sulbar	76.158	71.823	72.037	65.667	75.713	72.280	10,01	64,73
5	Sumbar	48.113	58.740	56.675	52.917	62.623	55.814	7,73	72,46
6	Lampung	23.765	25.507	34.689	32.251	38.902	31.023	4,30	76,75
7	Sumut	36.188	31.789	19.380	17.281	19.380	24.803	3,43	80,19
8	Lainnya	142.131	146.016	140.755	133.853	152.813	143.114	19,81	100,00
Indonesia		740.513	720.862	728.414	661.243	760.430	722.292	100,00	

Source : Directorate General of Plantation, processed by Pusdatin
Notes : *) Temporary
**) Estimated

According to Askindo, export earnings in the form of seeds and half of processed cocoa is relatively very low. So there should be industrialization of processed cocoa products to finished products such as ready-to-eat chocolate foods. Cocoa that has been processed into chocolate food has a huge added value.

The government is targeting to increase Indonesia's to become the world's second largest cocoa producer. Currently, Indonesia is ranked fourth as a cocoa-producing country.

The government encourages increased productivity of cocoa or cocoa plantations to meet the needs of domestic industries. Increased productivity is done by rejuvenation in a number of cocoa plantations, especially those in Sulawesi. Most of the cocoa plantations in Sulawesi are smallholder plantations that require better seeding and technology support.

Rejuvenation of cocoa plantations is expected to increase productivity and increase the supply of raw materials for industry. The capacity of the domestic cocoa processing industry is increasing but the shortage of raw materials has to be imported. The increase in the industry following the existence of export duty policy so that the industry to grow. With the rejuvenation of cocoa plantations is expected Indonesia can crawl up to second place as a cocoa producing country.

Sulawesi remains the largest cocoa producer in Indonesia. 60 percent of Indonesia's cocoa area is found in Sulawesi, which contributes up to 500 million tons of national production. Then the second sequence is Sumatra with an area of approximately 300 thousand ha, contributing up to 150,000 tons of production, concentrated in NAD Province. The rest is spread on the island of Borneo, Bali, Maluku, and Papua.

and still allows new traders to enter the market. In addition, price variations between districts and even between villages can be very significant.

Otherwise, for manufacturers, such conditions are not then used to get cheap cocoa beans. The reason, in the future, with the BK policy, encouraging foreign companies to invest in establishing cocoa plant in Indonesia. Preferably, cocoa processing companies start building partnerships with the farmer.

Cocoa development continues to increase from year to year, seen from the average growth rate of cocoa area during the period of 2010-2016 amounted to 14.48% and production of 14.01%. Based on the average data for 2012-2016 (the last five years), the cocoa plantation area reaches 1.74 million hectares with an average plantation area of 1.68 million ha (96.70%), large state plantations 27.27 thousand ha (1.40%), and large private plantations of 33.04 thousand ha (1.90%). In terms of its form of cultivation, public estates (PR) contributed dry seed production of 682.54 thousand tons (96.70%), state-owned plantation (PBN) of 16.80 thousand tons (1.40%), and large estates private (PBS) of 22.95 thousand tons (1.90%). The production is achieved at the level of smallholder plantation productivity of about 0.81 tons / ha, large state plantations of 0.87 tons / ha, and large private estates of 0.87 tons / ha. This cocoa production is generally spread in Central Sulawesi of 156.63 thousand tons (21.69%), South Sulawesi of 119.79 thousand tons (16.30%) Southeast Sulawesi 118.82 thousand tons, West Sulawesi 72.28 thousand (10.01%), West Sumatra with 55.81 thousand tons (7.73%), Lampung with 31.02 thousand tons (4.30%), North Sumatra with 24.80 thousand tons (3.43%) and other province 143.11 thousand tons (19.81%).

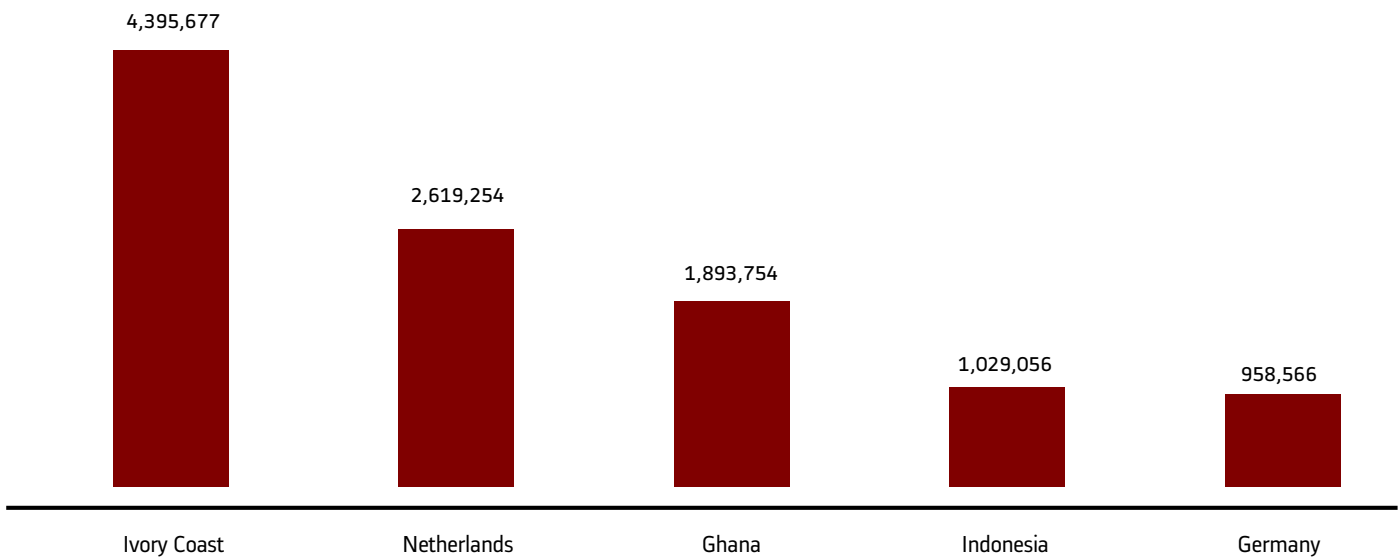
CACAOPOEDER
CACAO EN POWDRE
COCOA POWDER
KAKAOPULVER
CACAO EN POLVO



Poids net
Net weight
Nettogewicht
Peso neto

25 kg
55.11 lbs

Indonesia Export Of Cacao Product To World



Source : Trademap

In global trade, Indonesia becomes the fourth largest cocoa producer in the world with total export value of USD 1, 02 million in 2016 or in other words Indonesia contributes 5.81% to world cocoa needs. The world cocoa market share dominated by the Ivory Coast who controls the world cocoa market of 24.83%.

To improve the competitiveness of Indonesian cocoa in the international market, it is necessary to take several steps, among others, through the improvement of human resources by encouraging the increase of added value from local resources. Several influential factors in the effort to improve the competitiveness of Indonesian cocoa include the condition of factors, demand conditions, related industries and supporters, strategy and competition structure, government policy and opportunities and opportunities for cocoa development in Indonesia. The influential actors in the effort to increase competitiveness are government, industry, supplier industry, association, financial institution (banking), competitor state standard institution.

The largest producers of cocoa and cocoa products are African Countries such as Ivory Coast, Ghana, Cameroon, Nigeria, Togo and others. Other areas are Latin America such as Brazil, Ecuador and Dominican Republic. For the Asian region, Indonesia is the largest supplier followed by Malaysia and Papua New Guinea. Besides Africa, Latin America and Asia, market participants who have a big role to demand cocoa and cocoa products are the Swiss state, as the country has many food and beverage products, as well as several other European countries.



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