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Report Highlights:

For marketing year 2025/26, Indonesian sugarcane and plantation white sugar productions are forecast to further increase to 35.0 million metric tons (MMT) and 2.6 million metric tons (MMT) respectively. This is due to harvested area expansion as well as the impact of La Nina, which is predicted to last until April 2025. Due to the expected higher production of domestic plantation white sugar, the Government of Indonesia (GOI) issued no import allocations for plantation white sugar for 2025/26 and slightly reduced the raw sugar import allocation for refineries. In line with population growth and growing demand from the food and beverage industry but hindered by an increased health focus, 2025/26 sugar consumption is forecast to reach to 7.7 MMT of raw sugar equivalent.

Glossary:

API-P	: Producer Importers Identification Number
ASEAN	: Association of Southeast Asian Nations
ATIGA	: ASEAN Trade in Goods Agreement
BMKG	: The Indonesian Meteorology, Climatology, and Geophysics Agency
GOI	: Government of Indonesia
HET	: Maximum Retail Price
HFCS-55	: High Fructose Corn Syrup with 55% fructose content (HS Code 170260)
ICUMSA	: International Commission for Uniform Methods of Sugar Analysis
ID	: Import Duty
IU	: International Unit
MOI	: Ministry of Industry
MOT	: Ministry of Trade
NFA	: National Food Agency
OECD	: The Organization for Economic Cooperation and Development
Sembako	: Nine staple foods
SBH	: Profit Sharing Scheme
SPT	: Sugarcane Purchasing Scheme
TCD	: Tons of Cane per Day
TPD	: Tons Per Day
VAT	: Value Added Tax

General Summary

As one of the so-called *"Sembako"* or essential food products along with rice, corn, soybeans, cooking oil, beef, poultry meat, shallots, and eggs per Ministry of Trade (MOT) Regulation No. 27/2017, sugar is strictly regulated. Ministry of Industry (MOI) Regulation No. 47/2024 on Assurance of Fulfillment of Raw Material Needs for the Sugar Industry which was issued on October 15, 2024, classifies domestic sugar into three categories:

Table 1. Sugar Classification

Category	Purpose	HS Codes
Raw cane sugar	Raw material for sugar refineries or sugar mills	1701.12.00, 1701.13.00, 1701.14.00
Plantation white sugar	Household consumption	1701.91.00, 1701.99.90
Refined sugar	Raw material for food and beverage industry as well as pharmaceutical industry	1701.99.10

Source: Ministry of Industry No. 47/2024.

The regulation also states that the sugar industry, which consists of sugar mills and sugar refineries, must prioritize using domestically produced raw materials. They may only import raw materials when domestic supplies are not sufficiently available in terms of volume or quality or if the raw material is not produced domestically. In 2022, the Government of Indonesia (GOI) also included sugar as one of the first five commodities whose import volume allocation would be based on the Commodity Balance policy (please see ID2024-0046, Section IX: Import Procedure, page 50 for more information on Commodity Balance).

Sugar mills are only permitted to produce white sugar (plantation white sugar), and refineries are only permitted to produce refined sugar. Sugar mills use domestically produced sugarcane as their raw material while refineries use imported raw sugar as their raw material. However, since domestic demand for white sugar far outpaces local production, significant volumes of imports are sometimes required to also fill the idle capacity of sugar mills. Using the Commodity Balance policy, the GOI tightly controls the timing, import volume, and distribution of import quotas. Additionally, if refined sugar with certain technical specifications is unavailable in the local market, food and beverage companies might be authorized to import these special sugars. National demand for both plantation white and refined sugar continues to increase along with population growth and an expanding food and beverage industry.

Sugar consumption for 2024/25 is expected to increase to 7.6 MMT of raw sugar equivalent from 7.5 MMT of raw sugar equivalent in 2023/24. In line with population growth and growing demand from the food and beverage industry, 2025/26 sugar consumption is forecast to reach to 7.7 MMT of raw sugar equivalent.

Production

Sugarcane

In Indonesia, white sugar is produced from domestically produced sugarcane and is primarily for direct human consumption. Refined sugar is made from imported raw sugar, which is generally used for processing by the food and beverage industry. Refined sugar produced from imported raw sugar is prohibited from being distributed to retail markets for direct human consumption.

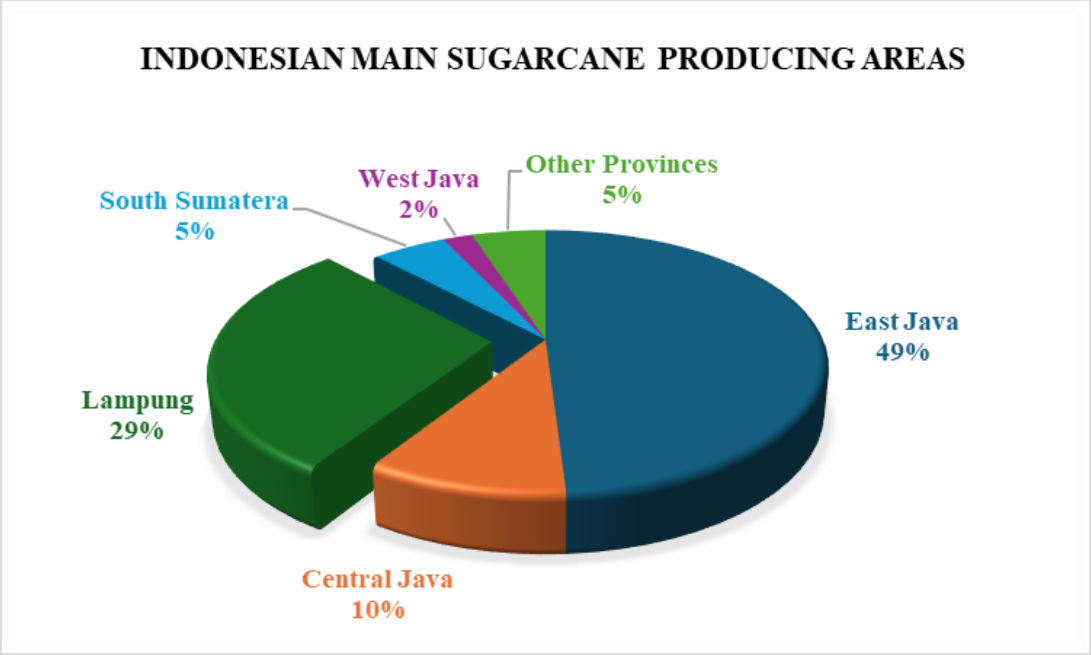
Table 2. PSD: Sugarcane for Centrifugal

Sugar Cane for Centrifugal	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	510	510	510	510	0	520
Area Harvested (1000 HA)	504	504	500	505	0	515
Production (1000 MT)	31000	31000	28000	32000	0	35000
Total Supply (1000 MT)	31000	31000	28000	32000	0	35000
Utilization for Sugar (1000 MT)	31000	31000	28000	32000	0	35000
Utilization for Alcohol (1000 MT)	0	0	0	0	0	0
Total Utilization (1000 MT)	31000	31000	28000	32000	0	35000
(1000 HA), (1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note: The last column of each Marketing Year is not official USDA data.

Currently, a total of 62 sugar mills are operating in Indonesia, with a national installed capacity of 316,950 tons of cane per day (TCD). Of these mills, 43 mills are administered by state-owned companies and 19 are privately-owned. According to the most recent publication on sugarcane by the Indonesian Statistics Agency (*BPS, Badan Pusat Statistik*), in 2023, Indonesia's main producing areas of sugarcane are as follows:

Chart 1. Indonesia's Main Sugarcane Producing Areas



Source: BPS, 2023

In 2023, BPS reported that smallholder farmers accounted for approximately 63 percent of the total sugarcane area, while the rest is managed by state-owned enterprises (10 percent) and private companies (27 percent). The area managed by smallholder farmers is on the decline due to rapid infrastructure development on Java as well as competition with other food crops, such as corn and paddy, which can provide higher margins. However, as more sugar mills change their payment scheme from a profit-sharing scheme (*SBH, Sistem Bagi Hasil*) to a sugarcane purchasing scheme (*SPT, Sistem Pembelian Tebu*), more farmers are incentivized to grow sugarcane. Through the SPT payment scheme, sugar mills purchase farmers' sugarcane directly at a purchase price set by the government according to the quality of the sugarcane. With the new system, farmers do not have to wait for months until the plantation white sugar produced from their sugarcane is sold to receive payment. On the other hand, private companies' area expansion, which reached 1.3 percent outside of Java and 3.8 percent on Java Island, offset the decline in smallholders' area. As a result, harvested area in 2024/25 is estimated to increase slightly to 505,000 hectares from 504,000 hectares in 2023/24. Harvested area in 2025/26 is forecast to continue increasing to 515,000 hectares from area expansion outside of Java Island.

Despite the issuance of Presidential Decree No. 15/2024 on April 19, 2024, on the Formation of Task Force for Accelerating Sugar and Bioethanol Self-Sufficiency in Merauke Regency, South Papua Province, no significant sugarcane area expansion on Merauke Food Estate land is projected to materialize soon. The Food Estate Program is one of President Prabowo's flagship programs and aims to open a total of 541,094 hectares of new land for sugarcane plantations in Merauke Regency, South Papua Province. The program is part of the National Strategic Projects to achieve self-sufficiency in food and energy. Approximately 30 percent of the targeted new area expansion is located in pristine forests and peatlands. A lack of infrastructure and problems in opening new land related to property rights and the displacement of indigenous people remain the main obstacles to achieve the target.

In March 2025, Java, the most populated island in Indonesia and the largest contributor to Indonesian sugarcane production, received significant rainfall despite the Indonesian Meteorology, Climatology and Geophysics Agency's (*BMKG*) previous prediction that the 2024/25 rainy season would peak from January to February 2025. BMKG predicts that Java and Bali will continue to receive above normal rainfall for the next few months. The agency stated that the arrival of rain in March 2025 was caused by Kelvin and Low Frequency atmospheric waves, Tropical Cyclone Seed 98S in the Indian Ocean southwest of Bengkulu, and cyclonic circulation in the Indian Ocean west of North Sumatra, in addition to the weak La Nina that is already predicted to last until at least April 2025. Consequently, the 2025/26 dry season on these islands is predicted to start late. A total of 57.7 percent of area in Indonesia is predicted to enter the dry season from April to June 2025 with the Nusa Tenggara area predicted to experience the dry season earlier than other areas. The onset of 2025 dry season in Indonesia is predicted to start on time or later in 59 percent of total. Accumulated rainfall during the dry season in most areas is predicted to be normal (not wetter or drier). The peak of the 2025 dry season is predicted to occur in August 2025 in most areas of Indonesia, which is considered normal. No extreme climatic conditions are predicted for the second half of 2025.

Due to the effect of the weak La Nina in 2024/25, sugarcane still received rain during the dry season which led to longer stalks as crops could grow longer segments during the vegetative period. Therefore, yields are estimated to increase to 63.4 metric tons (MT) per hectare compared to 61.5 MT per hectare achieved in 2023/24. Yield is forecast to further increase to 67.9 MT per hectare in 2025/26 as plantations continue to receive sufficient rainfall. Considering the larger harvested area and higher yields, 2024/25 sugarcane production is estimated to increase to 32.0 MT. Sugarcane production is forecast to further increase by 9.4 percent to 35.0 MT in 2025/26.

Plantation White Sugar and Refined Sugar

Table 3. Profile and Characteristics of Indonesian Sugar Industry in 2024

No.	Description	Sugarcane Based	Raw Sugar Based
1.	Number of companies	18	11
2.	Number of plants	62	11
3.	Processing capacity	316,950 TCD Avg. 5,100 TCD per mill	5.016 MMT of installed capacity (initial permit) 4.228 MMT of installed capacity (actual)
			3.668 MMT of running capacity (84.14 percent)
4.	Raw material	Sugarcane from mills' own plantations and farmers as well as annually authorized amount of imported	Imported raw sugar

		raw sugar to fill idle capacity.	
5.	Number of processing day	Avg. 160 days per year	Avg. 320 days per year
6.	Annual production potential	2.5-3.0 MMT	3-4 MMT
7.	Age of existing mills	5-188 years old	7-16 years old
8.	Influence of climate on production	Strong	Almost none
9.	Overseeing agency	Ministry of Agriculture (GOI Regulation No. 17/1986)	Ministry of Industry (Law No. 5/1984)

Source: MOA, MOI, MOT, compiled by FAS/Jakarta

Smallholder farmers supply sugarcane to both state-owned enterprises and private sugar mills. Indonesia's state-owned sugar mills are aging, with approximately 37 out of 43 being over 100 years old. State-owned sugar mills' contribution to total production is on the decline as private companies with more efficient machinery and technology produce more. Nonetheless, with new sugar mills coming online, state-owned companies' ownership of sugarcane plantations is increasing. From 2020 to 2024, plantation area of state-owned companies increased by 5.76 percent per annum while private companies' areas grew by 5.43 percent per annum. In 2024, state-owned sugar mills made up 54.2 percent of total national plantation area while white sugar production totaled 47.8 percent of area, a slight increase compared to 45.4 percent in 2023. As a result of aging machines, the average 5-year recovery rate across the entire industry is estimated to reach only 7.5 percent in 2024/25. In addition, higher moisture content from more rainfall is estimated to reduce the recovery rate in 2025/26 to 7.45 percent.

Table 4. PSD: Centrifugal Sugar

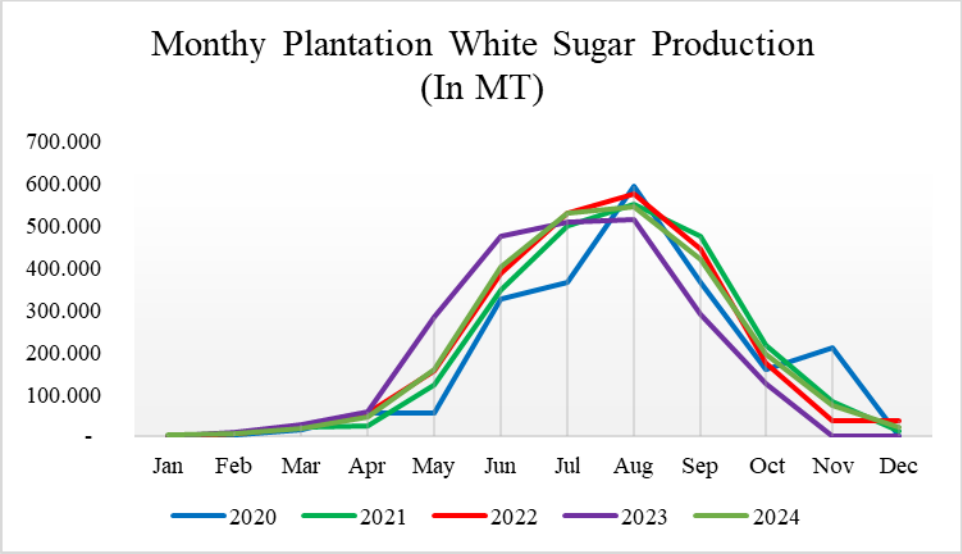
Sugar, Centrifugal	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	2330	2330	1950	1950	0	1750
Beet Sugar Production (1000 MT)	0	0	0	0	0	0
Cane Sugar Production (1000 MT)	2300	2300	2000	2400	0	2600
Total Sugar Production (1000 MT)	2300	2300	2000	2400	0	2600
Raw Imports (1000 MT)	4700	4700	5400	5000	0	5000
Refined Imp.(Raw Val) (1000 MT)	300	300	150	200	0	100
Total Imports (1000 MT)	5000	5000	5550	5200	0	5100
Total Supply (1000 MT)	9630	9630	9500	9550	0	9450
Raw Exports (1000 MT)	0	0	0	0	0	0
Refined Exp.(Raw Val) (1000 MT)	180	180	100	200	0	150
Total Exports (1000 MT)	180	180	100	200	0	150
Human Dom. Consumption (1000 MT)	7500	7500	7600	7600	0	7700
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	7500	7500	7600	7600	0	7700
Ending Stocks (1000 MT)	1950	1950	1800	1750	0	1600
Total Distribution (1000 MT)	9630	9630	9500	9550	0	9450

(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note: The last column of each Marketing Year is not official USDA data.

The Muslim fasting month of Ramadan started in early March 2025, with Eid continuing through mid-April. Like the past two years, to avoid less efficient operations due to worker holiday travel, most mills are expected to begin the milling season in May 2025 and will conclude by November 2025. Few mills on Java Island started the milling season in April 2025 as these mills started planting earlier in March or April 2024. Considering the abovementioned factors, 2024/25 plantation white sugar production is estimated to increase to 2.4 MMT from 2.3 MMT in 2023/24. Plantation white sugar production in 2025/26 is forecast to further increase to 2.6 MMT due to larger harvested area and higher sugarcane yield.

Chart 2. Indonesia: Monthly Plantation White Sugar Production



Source: Industry

There are 11 sugar refineries processing imported raw sugar into refined sugar, with a total installed capacity of 5.016 MMT. The running capacity of these refineries varies depending on the GOI's issuance of raw sugar import permits. In 2024/25, running capacity increased to 84.1 percent, compared to 78.8 percent in 2023/24 due to increased authorized raw sugar imports. In line with the forecasted growth of the food and beverage industry, demand for refined sugar in 2025/26 is expected to increase by 6 percent. Accordingly, 2025/26 refinery running capacity is forecasted to reach approximately 89.0 percent.

Table 5. Capacity of Indonesian Sugar Refineries

No	Year	Number of Refineries	Unit (1,000 MT)		Running Capacity (%)
			Installed Capacity	Processed Raw Sugar	
1	2	3	4	5	6
1	2016	11	3,608.19	3,348.49	92.80
2	2017	11	4,227.88	3,333.38	78.84
3	2018	11	4,227.88	3,265.06	77.23
4	2019	11	4,227.88	3,335.90	78.90
5	2020	11	4,227.88	3,263.99	77.20
6	2021	11	4,227.88	3,311.55	78.33
7	2022	11	4,227.88	3,500.96	82.81
8	2023	11	4,227.88	3,331.15	78.79
9	2024	11	4,227.88	3,667.51	84.14
10.	2025*	11	4,227.88	215.56	5.10

Source: Nusantara Sugar Community
*Note: *as of January 2025*

Consumption

Weakened global demand for Indonesian manufactured goods exports, which subsequently have caused massive layoffs in the labor-intensive manufacturing sectors such as the footwear and textile industries, has led to worsening Indonesian economic conditions. The deflation that Indonesia has been experiencing since the middle of 2024 reflects depressed consumer purchasing power.

Chart 3. Indonesia Inflation Rate

Despite these conditions, the Indonesian Food and Beverage Industry Association (*GAPMMI, Gabungan Perusahaan Makanan dan Minuman Indonesia*) estimates that the food and beverage industry will continue to grow by 6 percent driven by technological innovations, changing consumption patterns, and increasing awareness of sustainable supply chain. This will drive an increased demand for sugar. However, due to Indonesia's high rates of obesity, diabetes, hypertension, and other non-communicable diseases stemming from the high consumption of salt, sugar, and fat, on November 4, 2024, Indonesia notified the World Trade Organization (WTO) of its draft measure to control salt, sugar, and fat (SSF) content in processed foods and beverages including fast food. The GOI is preparing to implement measures such as mandatory front-of-package labelling and a sugar excise on sweetened packaged beverages (please see ID2024-0043). In line with increased health awareness, in its October 2024 publication, the OECD projected that Indonesia's consumption of sugar will grow at a slower pace of 1.16 percent per year from 2024 to 2033 compared to 1.64 percent per year during the period of 2014 to 2023. Therefore, it is estimated that Indonesian per capita consumption of sugar in 2025 will reach approximately 27.3 kg, increased from 27.0 kg in 2024. Considering the above factors, sugar consumption in 2024/25 is estimated to marginally increase by 1.1 percent to 7.6 MMT of raw sugar equivalent, consisting of 4.1 MMT of sugar for direct consumption and 3.5 MMT of sugar for food and beverage industry use. In line with population growth, sugar consumption in 2025/26 is forecast to further increase to 7.7 MMT of raw sugar equivalent.

Corn milling capacity is continuing to grow. Industry's installed capacity is estimated to increase to 4,500 MT per day in 2024/25, compared to 4,000 MT per day in 2023/24. The industry consists of four major players and remains the main importer of corn due to food safety requirements for corn in the wet milling process. The four corn wet mills produce corn starch, HFCS-55, glucose syrup, and maltodextrin from imported corn. As wet mills choose to no longer produce HFCS-55 for export markets due to lackluster profits, production of HFCS 55 in 2023/24 is estimated to have declined by 20 percent to 84,000 MT of HFCS-55 (equal to 69,536 MT of raw sugar equivalent) compared to 106,000 MT of HFCS-55 (equal to 86,920 MT of raw sugar equivalent) produced in 2022/23. In addition, imports of HFCS-55 in 2024/25 have significantly increased by 206 percent to 14,224 MT of raw sugar equivalent compared to 4,642 MT of raw sugar equivalent imported in 2023/24. During the period of May 2024 to January 2025, imports of HFCS 55 increased by 301 percent to 32,934 MT of raw sugar equivalent compared to 8,205 MT of raw sugar equivalent during the same period of the previous marketing year. The significant increase is due to the end of the implementation of Ministry of Finance Regulation No. 126/2020 on the Imposition of Safeguard Duty on Imports of Fructose Syrup effective from September 9, 2020 to September 9, 2023 which placed a 20+ percent duty on all HFCS imports. With the removal of the safeguard duty, there remains only an MFN duty of 5 percent. From May 2024 to January 2025, Indonesia imported HFCS 55 from China (55 percent) and Turkey (45 percent).

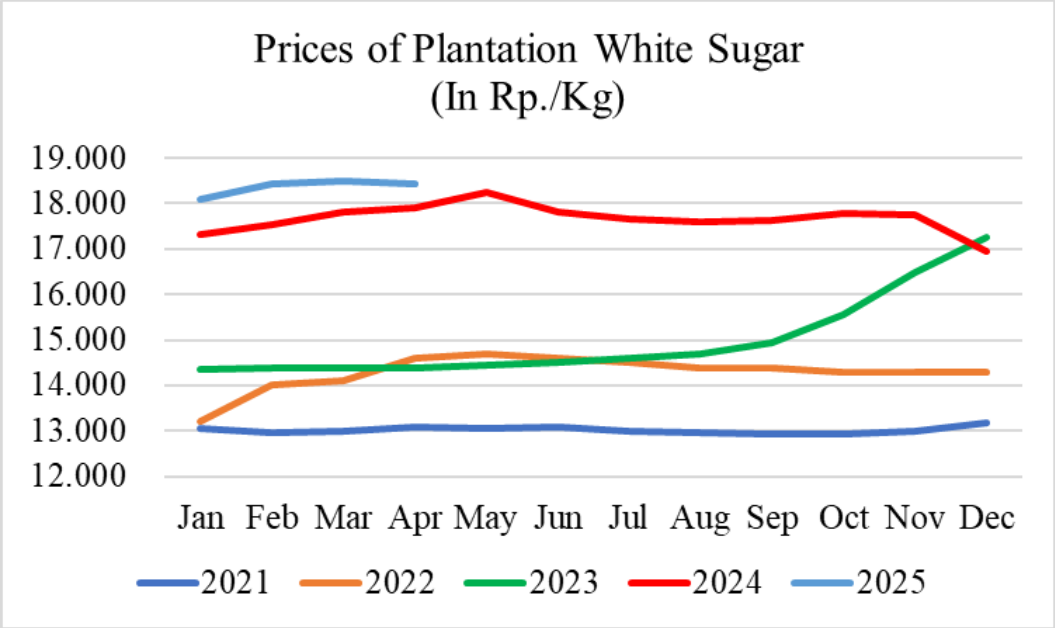
Prices

The National Food Agency (NFA) issued Regulation No. 12/2024 establishing reference purchasing and selling prices for plantation white sugar to ensure stable supply and prices of plantation white sugar at the farm gate and for retail. In accordance with the regulation, NFA increased the reference price of plantation white sugar at the producer level to 14,500 IDR/kg

($856/MT) from the previous price of 12,500 IDR/kg ($738/MT) in order to incentivize farmers to produce more sugar to meet national production targets. NFA also increased the reference price of plantation white sugar at the retail level to 17,500 IDR/kg ($1,032/MT) from 16,000 IDR/kg ($944/MT) for consumers in western and central provinces of Indonesia. For consumers in Indonesia's eastern provinces and in most outskirt and border areas, the NFA increased the price to 18,500 IDR/kg (USD 1,092/MT) from the previous prices of 17,000 IDR/kg (USD 1,003/MT).

Whenever farm gate prices fall below the reference purchasing price, the Head of NFA may assign Indonesia's national logistics agency BULOG or other state-owned companies to procure sugar from farmers at the reference price. When sugar retail prices increase above the reference prices, the Head of NFA may also assign BULOG or state-owned enterprises to conduct market operations by selling sugar from the GOI's reserves in collaboration with wholesalers at the reference price level to dampen prices. As the milling season just has started, the average retail price for plantation white sugar is currently still above the reference price.

Chart 4. Indonesia: Jakarta Monthly Average Retail White Sugar Prices (Rp. /Kg)



Source: Ministry of Trade, data since 2023 are from National Food Agency (NFA).

Stocks

Despite higher domestic plantation white sugar production, lower imports are expected to reduce 2024/25 ending stocks to 1.750 MMT of raw sugar equivalent compared to 1.95 MMT of raw sugar equivalent in 2023/24. Stocks are forecast to decline further to 1.60 MMT of raw sugar equivalent in 2025/26 in line with population growth, growing food and beverage industry demand, and lower imports of plantation white sugar. Approximately 43.3 percent of plantation white sugar stocks is being held by sugar mills, 5.5 percent by farmers, 50.7 percent by wholesalers, and the rest (0.4 percent) by the GOI.

Trade

MOT Regulation No. 36/2023, amended by MOT No. 8/2024 covers the approval process for imported sugar. The regulation defines sugar specifications that are allowed for import as follows:

Table 6. Ministry of Trade Regulation No. 8/2024 on Sugar Imports

No.	HS Code	Description	Allowed for Imports
A		Raw Sugar	
	17.01	Cane or beet sugar, pure chemically sucrose, solid form	
		-does not contain additional color or flavor	
1.	1701.12.00	-- beet sugar	With ICUMSA ≥600 IU
2.	1701.13.00	-- cane sugar	
3.	1701.14.00	-- other cane sugar	
B.		Refined Sugar	
	17.01	Cane or beet sugar, pure chemically sucrose, solid form	
		-Other	
	1701.99	--other:	
4.	1701.99.10	---purified sugar	With ICUMSA ≤75 IU
C		White Sugar	
	17.01	Cane or beet sugar, pure chemically sucrose, solid form	
		-others:	
5.	1701.91.00	--containing additional color or flavor	With ICUMSA 81 – 200 IU
	1701.99	--others:	
	1701.99.90	---others	With ICUMSA 81 – 200 IU

Source: Ministry of Trade Regulation No. 8/2024

In addition to MOT Regulation No. 8/2024, MOI Regulation No. 47/2024 further stated that imported raw sugar must only be used as raw material for sugar mills to produce white sugar for household consumption or for refineries to produce refined sugar for food and beverage industry use. Refined sugar may only be imported as a raw material by the food and beverage industry with an MOI recommendation. Only importers who hold importer-producer identification numbers (*API-P*, *Angka Pengenal Importir-Produser*) can import raw or refined sugar. White sugar can only be imported to build up national stocks and stabilize prices. Only state-owned enterprises and API-P importers can import white sugar upon authorization from the government.

In addition to receiving an import recommendation from the Ministry of Industry, white sugar importers must obtain an import recommendation from the Ministry of State-Owned Enterprises and the Ministry of Agriculture to obtain an import license from the Ministry of Trade. Import licenses for white sugar are valid for one year from the issuance date. However, the GOI expects

sugar mills, sugar refineries, as well as the food and beverage industry to consume domestically produced refined sugar. However, companies with specific refined sugar technical requirements that domestic producers cannot meet may still import a limited amount of refined sugar to meet their needs.

Import allocations for sugar mills: Therefore, due to the forecast increase in plantation white sugar production for 2024/25, during the Commodity Balance interministerial meeting held on December 9, 2024 to determine 2025 import volume quotas for sugar, the GOI stated that it will not issue any import licenses for sugar mills to import raw sugar for plantation white sugar production. However, because the main 2024/25 milling season has been delayed until May 2025 to accommodate labor shortages during Ramadan while plantation white sugar stocks have already begun to be depleted, in early February 2025, the Head of NFA announced the decision to import 200,000 MT of raw sugar for sugar mills to process into plantation white sugar. The agency stated that the decision was based on the increasing retail prices for plantation white sugar, and that the plantation white sugar produced from the imported raw sugar will be earmarked to strengthen the government's food reserves.

Import allocations for sugar refineries: During the same 2025 Commodity Balance interministerial meeting for sugar, the GOI set the total 2025 import allocation for refineries at 3.5 MMT of raw sugar, a decline of 2.8 percent compared to 3.6 MMT of raw sugar imports authorized for refineries during the 2024 Commodity Balance interministerial meeting. Considering the increasing demand for refined sugar by the food and beverage industry, despite the already set allocation, the GOI allows industry to propose additional import permits when needed. In 2024, sugar refineries imported a total of 3.7 MMT of raw sugar despite a total allocation of 3.45 MMT. The surplus was carryover from the GOI's 2023 import allocation of 3.61 MMT. This sugar must be refined and may only be distributed to the domestic food and beverage industry.

As mandated by Law No. 7/2021 concerning Harmonization of Tax Regulations and referring to Ministry of Finance Regulation No. 43/2022, which serves as one of the implementing regulations under the ASEAN Trade in Goods Agreement (ATIGA), the GOI sets sugar import duties and taxes as follows:

Table 7. Indonesia: Sugar Import Duty (ID) and Value Added Tax (VAT), 2024

No.	Commodity	ID non-ASEAN		ID ASEAN	VAT (%)
		(Rp./Kg)	(US$/ton)	(%)	
1	Raw cane sugar	550	35	5	11
2	White sugar	790	50	10	11
3	Refined sugar	790	50	10	11

Source: Ministry of Finance (MOF) Regulation No. 26/2022, MOF regulation No. 43/2022.

Based on the aforementioned factors, combined with a weakened exchange rate which will hinder the growth of imports, 2025/26 raw sugar imports are forecast to remain stable at 5.0

MMT as in 2024/25. In line with forecasted increased domestic plantation white sugar and refined sugar production, 2025/26 refined sugar imports are forecast to further decline to 100,000 MT of raw sugar equivalent from 200,000 MT of raw sugar equivalent estimated to be imported in 2024/25.

Despite Thailand's higher sugar production in 2024/25, Brazil remains the main supplier of raw sugar to Indonesia. From May 2024 to January 2025, Indonesia's raw sugar imports originated from Brazil (68 percent), Australia (18 percent) and Thailand (13 percent). For refined sugar imports, Vietnam took over Thailand's position as the largest supplier to Indonesia with a total market share of 36 percent, followed by Thailand (22 percent) and Brazil (18 percent).

TRADE MATRICES

Table 8. Import Trade Matrix, Raw Sugar 2023 -2025

Import Trade Matrix			
Country	Indonesia		
Commodity	Sugar, Raw		
Time Period	May-Apr	**Units:**	1,000 MT
Exports for:	2023/24		**2024/25***
United States	0		0
Others		Others	
Brazil	2,444	Brazil	2,425
Thailand	1,389	Australia	642
Australia	855	Thailand	459
South Africa	34		
Malaysia	3		
Total for Others	4,725		3,526
Others not Listed	0		0
Grand Total	4,725		3,526

Note: *) Only for the period of May 2024 to Jan 2025
Source: Trade Data Monitor

Table 9. Import Trade Matrix, Refined Sugar 2023 -2025

Import Trade Matrix			
Country	Indonesia		
Commodity	Sugar, Refined		
Time Period	May-Apr	**Units:**	1,000 MT
Exports for:	2023/24		**2024/25***
United States	0		0
Others		Others	
Thailand	99	Thailand	25
India	84	Brazil	21
Malaysia	27	India	15
South Korea	4	Ukraine	9
Brazil	1	South Korea	3
Total for Others	215		73
Others not Listed	15		44
Grand Total	230		117

Note: *) Only for the period of May 2024 to Jan 2025
Source: Trade Data Monitor.

Table 10. Export Trade Matrix, Refined Sugar 2023 -2025

Export Trade Matrix			
Country	Indonesia		
Commodity	Sugar, Refined		
Time Period	May-Apr	**Units:**	1,000 MT
Exports for:	2023/24		**2024/25***
United States	2		1
Others		Others	
Vietnam	83	Vietnam	71
Thailand	36	Thailand	35
China	20	China	35
The Philippines	12	The Philippines	29
Malaysia	10	Malaysia	7
Total for Others	161		177
Others not Listed	17		25
Grand Total	180		203

Note: *) Only for the period of May 2024 to Jan 2025
Source: Trade Data Monitor

Table 11. Exchange Rate (IDR/USD)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	14,084	14,229	14,459	14,453	14,292	14,452	14,548	14,306	14,321	14,171	14,320	14,278
2022	14,392	14,369	14,306	14,480	14,592	14,848	14,990	14,853	15,232	15,596	15,668	15,619
2023	14,992	15,240	15,418	14,661	15,003	15,000	15,026	15,237	15,487	15,897	15,587	15,439
2024	15,803	15,630	15,624	16,276	16,251	16,394	16,199	15,473	15,144	15,732	15,942	15,892
2025	16,312	16,575	16,575	16,943								

Source: Bank of Indonesia.
Note: Exchange rate is 16,943 IDR/USD $1, as of April 10, 2025

Attachments:

No Attachments