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Report Name: Drivers and Trends of US Agricultural Trade with Indonesia Opportunities and Challenges

Country: Indonesia

Post: Jakarta

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Report Highlights:

Following a lengthy period with a trade surplus, the U.S. trade balance with Indonesia in agricultural products began to reverse in 2021. Largely driven by increased palm oil exports, the highest trade deficit was recorded in 2022 at $1.8 billion. If the product scope is expanded to agricultural related products, including seafood and wood products, the deficit is even higher, valued at $3.7 billion in 2024. Overall, several factors substantially contributed to the U.S. agriculture trade deficit. These include increased competition (e.g., via tariff preferences and lower prices), non-tariff barriers (e.g., import licensing), and high U.S. demand for select Indonesian products. However, significant opportunities remain in this promising, albeit challenging, market, especially if the tariff and non-tariff barriers can be addressed.

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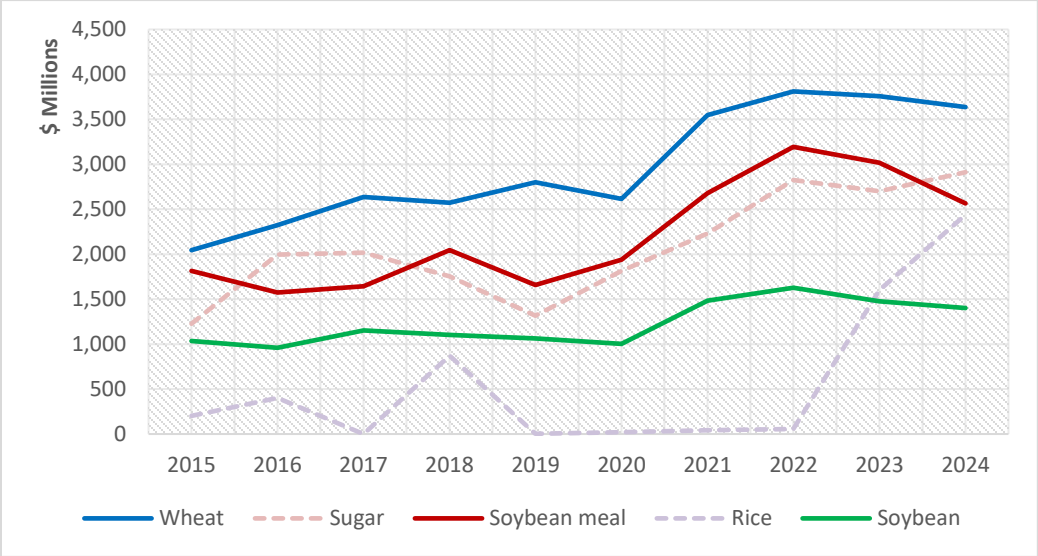
OVERVIEW: INDONESIA'S AGRICULTURAL IMPORTS

Indonesia imports significant volumes of agricultural products annually, including wheat, sugar, soybean meal, rice, and soybeans (see Figure 1). The factors that impact the U.S. market share for each is outlined by commodity in the below report. Indonesia has signed or is in the process of finalizing free trade agreements with most of its major trading partners (see Figure 2). Throughout the report, tariff preferences and their impact on market share are discussed.

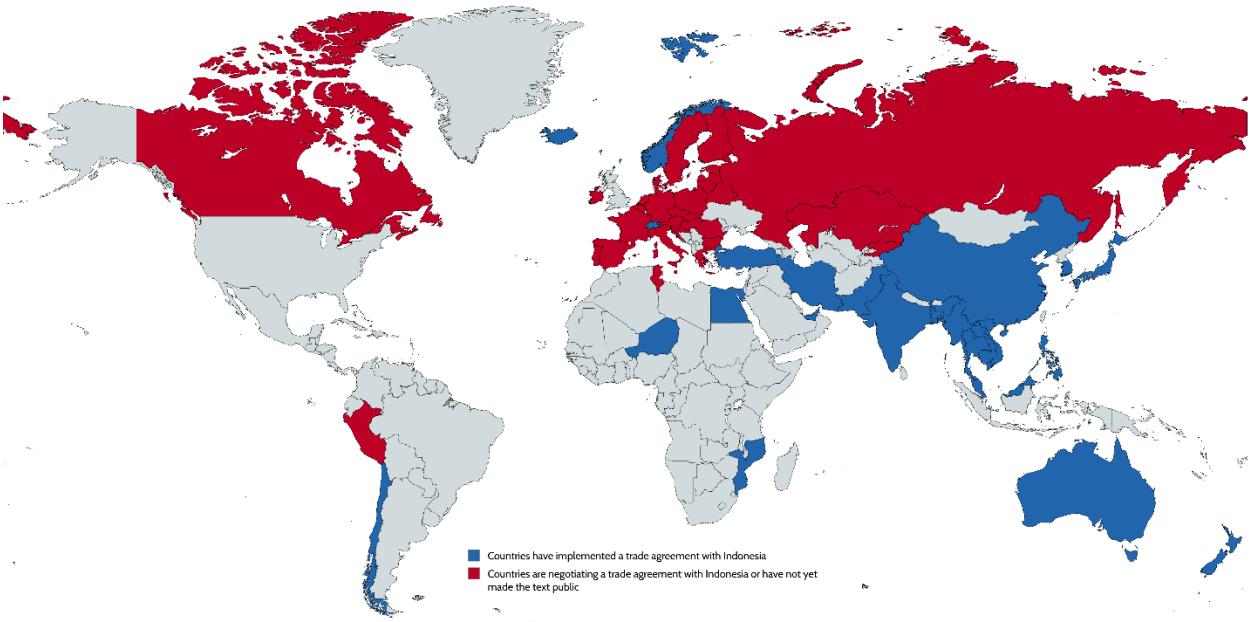
Figure 1. Top Indonesia Agricultural Imports from All Sources 2015-2024



Source: Trade Data Monitor, LLC

The ongoing U.S.-China trade dispute, intensified by fluctuating tariffs in 2025, is likely to affect upcoming trade and global supply chains. This includes agricultural trade between Indonesia and the United States. Both Indonesia and the United States are key markets and key producers of agricultural commodities. In 2024, Indonesia was the 11th largest destination for U.S. agriculture products and the United States was the 4th largest agricultural supplier for Indonesia.

Figure 2. Countries with Trade Agreements and Negotiating with Indonesia



OVERVIEW: U.S. AGRICULTURAL EXPORTS TO INDONESIA

Indonesia is an important market for U.S. agricultural products, thanks to having the fourth largest population in the world, an immense middle class, and consistent economic growth in the post-pandemic years. With over 270 million people, the demand for food and agricultural products is rising. The middle class, despite shrinking somewhat between 2018-2024, maintains its disposable income and drives higher consumption of high-quality food products. Top U.S. agricultural exports to Indonesia include soybeans (used primarily to make tempeh and tofu), feed ingredients, dairy products, cotton, wheat, and beef.

In 2024, U.S agricultural exports to Indonesia reached $2.9 billion, a 3 percent decrease from previous year as higher wheat exports were unable to offset decreased exports of combined feed ingredients, dairy products and cotton, trends which are discussed further below. However, U.S. agricultural exports to Indonesia increased on average from 2010 - 2024 due to continued demand from various sectors.

Bulk products: Under the bulk category, U.S. soybean exports increased 56 percent over this period due to increasing demand for tempeh and tofu and strong local industry preference for U.S. soybeans. U.S. soybeans enter Indonesia duty-free. While U.S. wheat export to Indonesia grew 14 percent to $199 million in the same period, U.S. market share of wheat moved up and down between 4 percent and 14 percent, due to user's preferences on variety and specification, price competitiveness, and geographic proximity among competing origins. Demand from food sectors such as the soy-based food industry, wheat millers, and bakeries were the main drivers for U.S. soybean and wheat imports. However, weakening purchasing power in 2024 and 2025 to date has reduced demand for some of these food items.

Intermediate products: In the intermediate products category, exports of three U.S. feed ingredients combined increased 41 percent from 2010 to reach a combined $616 million in 2024; this includes dried distillers' grains with soluble (DDGS), soybean meal, and other feeds and meals/fodder. This substantial increase is due to

expansion of the Indonesia's poultry sector and the use of these commodities in the aquaculture sector. Despite this expansion, Indonesia's feed industry suffered contraction during the pandemic year of 2020 and limited growth in 2024.

Consumer-oriented products: In the consumers-oriented products category, dairy and beef products are the top U.S. commodities exported to Indonesia. Their combined values reached $337 million in 2024, up 82 percent from 2010 of $185 million. However, tariff preferences granted to other countries limit exports in both categories, especially since most competitors' exports enter duty-free under free trade agreements.

OVERVIEW: INDONESIAN AGRICULTURAL EXPORTS TO THE UNITED STATES

Overall, most Indonesian agricultural exports to the United States are products that are not produced domestically. Key Indonesian agricultural and related exports to the United States in 2024 were vegetable oils (notably palm oil, of which Indonesia is the largest producer and exporter), seafood, and wood products. When combined, these accounted for 69 percent of total U.S. agricultural imports from Indonesia, valued at $6.6 billion. In addition, Indonesia is a significant supplier of coffee and cocoa; U.S imports were valued at $697 million combined in 2024.

Palm oil: Palm oil has historically played an important role in the U.S. food sector in the United States, offering competitive prices among other vegetables oils. Exports of Indonesian palm oil to the United States are expected to soften in 2025 on continued higher prices. In 2024, the United States imported $1.5 billion of Indonesia palm oil; 2025 imports are expected to remain between $1.2 billion and $1.5 billion.

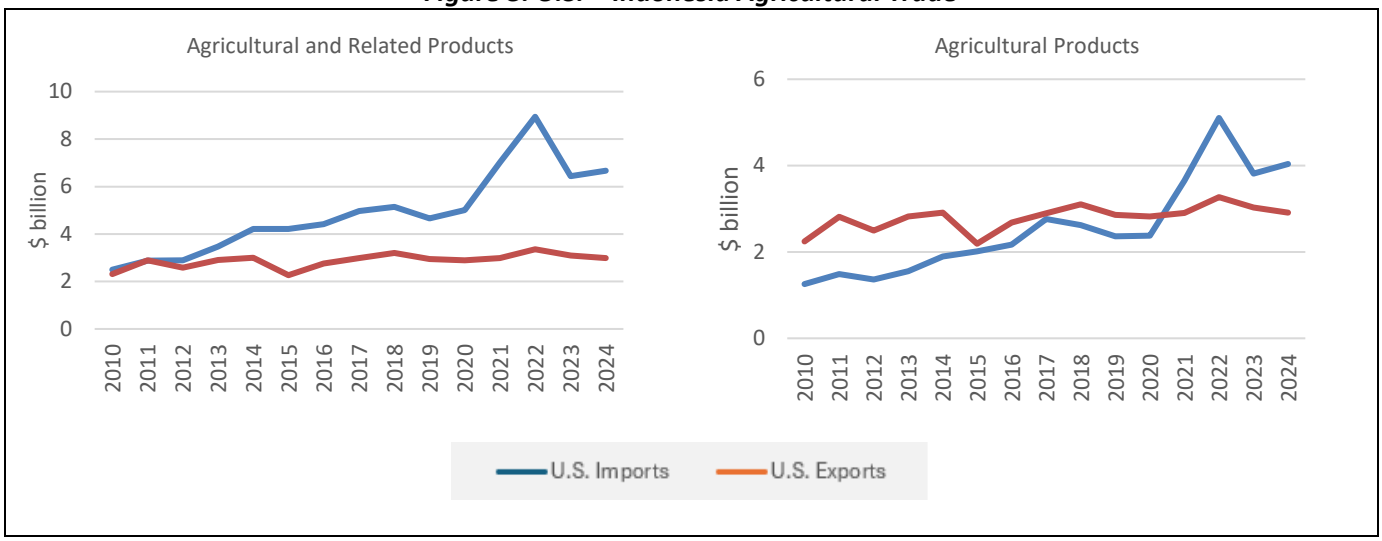
Seafood: Indonesian seafood exports to the United States were valued at $1.9 billion in 2024, mostly consisting of shrimp, crab, and tuna. The United States is the primary destination of Indonesia seafood exports, representing 35 percent of total seafood export value in 2024. Seafood exports have grown rapidly over the past decade, driven by robust consumer demand and competitive prices. In December 2024, the U.S. Department of Commerce issued an antidumping duty order on Indonesian frozen warmwater shrimp which impacts all but one shrimp exporter.

Wood: Exports of Indonesian hardwood plywood, wood windows and frames, doors, and lumber collectively accounted for $716 million in 2024. Indonesia's wood processing industry is the second largest in Southeast Asia after Vietnam, with its competitive labor and abundance of tropical wood resources. The wood industry is export-oriented and requires non-tropical wood from various regions, including from the United States, for raw materials.

TRADE BALANCE

The total agricultural trade between Indonesia and the United States had an average rate of growth of 6 percent annually between 2010-2024. However, while U.S. agricultural exports to Indonesia had an average annual growth rate of 3 percent, imports from Indonesia increased 200 percent from $1.3 billion in 2010 to $4 billion in 2024. Largely driven by increased palm oil exports, Indonesia's increased exports contributed to a deficit of $1.1 billion in 2024 for agricultural products (44 percent higher than in 2023). If the product scope is expanded to agricultural related products, including seafood and wood products, the deficit is even higher, valued at $3.7 billion in 2024.

Figure 3. U.S. – Indonesia Agricultural Trade



Source: GATS

Opportunities and Challenges for U.S. products

Opportunities: Opportunities remain for U.S. agricultural exports to Indonesia due to its population growth, shifting preferences towards more diverse and healthy diets, and expanding food and industrial demands via the retail and food processing sectors. Indonesia's population is projected to increase 4 percent from 2025 to reach 296 million in 2030, with the expectation of a significant middle class remaining. According to the Indonesian statistic agency (BPS), despite indications of that the middle-class contracted by 9 percent between 2018 and 2024, the number of aspiring middle-class consumers increased slightly[1]. Both aspiring and middle-class consumers represented 66 percent of population in 2024. In March 2025, a report[2] suggests that the size of Indonesia's middle class grew by 3.5 million people per year, a slowdown compared to 5 to 6 million people per year before 2018.

In addition, the full implementation of President Prabowo's flagship Free Nutritious Meals Program (MBG), which aims to serve 82.9 million beneficiaries, would create opportunities for U.S. exports. MBG meals are required to meet the nutrition standards set by the Ministry of Health, which include carbohydrates (largely from rice), protein (from side dishes), and vitamins and minerals (from fruit and vegetables). Milk is currently served optionally due to budget restrictions and reduced availability. If fully implemented, the MBG is expected to increase demand in several commodities, including soybeans, dairy products, poultry meat, eggs, fish, feed ingredients, vegetables, fruit, cooking oil, and wheat flour. However, the program is currently operating in the pilot phase, with only about 3 percent of the planned kitchen units in operation. While the program is prioritizing domestically produced commodities, opportunities remain for U.S. ingredients which would be further processed in Indonesia.

Challenges: Both tariff and non-tariff barriers significantly impede U.S. agricultural exports to Indonesia. U.S. agricultural products are subject to the Most Favored Nation (MFN) tariff rates, while many of our major

[1] BPS defines middle class as people with expenditures between 3.5 – 17 times of World Bank's poverty line standards. The aspiring middle-class expenditure is 1.5 to 3.3 time of the poverty line.

[2] The report found that consumption of middle class has lagged behind overall consumption growth, but still remains positive growth. It uses World Data Lab methodology that accounts for missing spending.

competitors benefit from tariff preferences via free trade agreements which eliminate or reduce tariffs. In addition to import duties, imported goods are subject to a range of additional taxes. These include a Value Added Tax, which varies between 0 percent and 12 percent, and an Import Income Tax, which generally ranges from 2.5 to 7.5 percent depending on the product classification and prevailing regulations. These taxes are assessed based on the customs value of the goods and, together with import duties, contribute to the total import cost for goods entering the Indonesian market.

In addition, wide-ranging and complex non-tariff barriers significantly impact U.S. agricultural exports. For example, U.S. and other agriculture products face complicated import licensing restrictions, including delayed issuance, slashed import quota allocations, and a growing role for state-owned enterprises. U.S. exports substantially affected by import license issues include beef, corn, seafood, and fresh fruit. For additional information on non-tariff barriers, please refer to the 2025 National Trade Estimates Report.

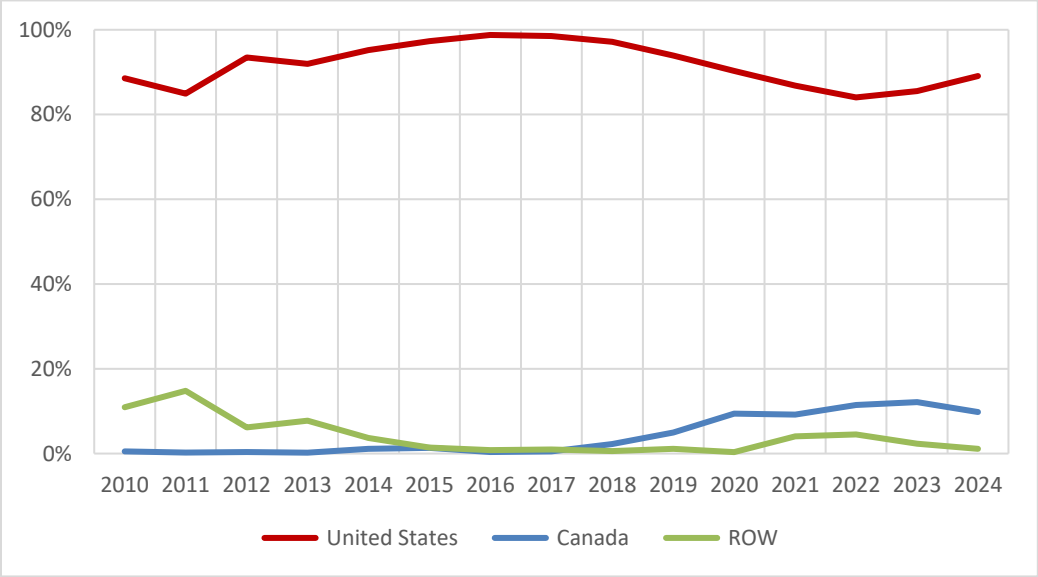
MARKET SHARE: ANALYSIS BY COMMODITY

Key commodities with significant exports and/or opportunity are summarized below:

Bulk Products

Soybeans: Indonesians rely on inexpensive protein sources made from soybeans, such tofu and tempeh. Indonesia is the largest market for U.S. soybeans in Southeast Asia and the third largest in the world. Primarily for food use, export volumes ranged from 1.9 million metric tons (MMT) to 2.6 MMT between 2015 and 2024. U.S. soybeans, largely due to local preferences and zero percent MFN import tariffs, are expected to remain dominant in supplying the soybean food processing industry in Indonesia. On expected competitive prices with decent Indonesia rupiah depreciation, U.S. soybean exports are projected to contribute between $1 billion and $1.3 billion in exports this year. In 2024, the market share for U.S. soybeans was 89 percent.

Figure 4. Indonesia Soybean Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

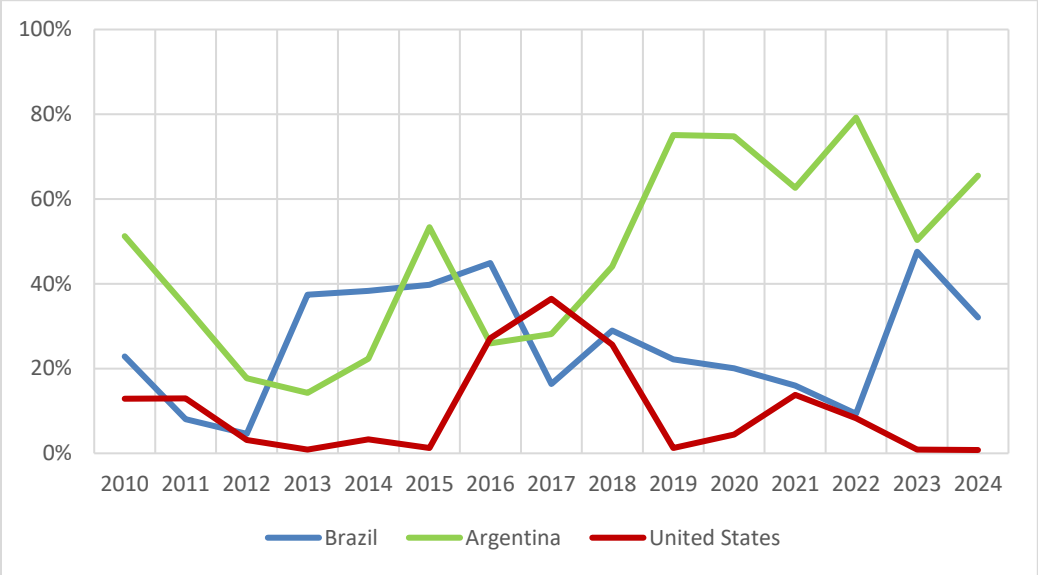
Table 1. Soybean Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	744	1,059	1,131	1,013	1,121	1,006	947	1,134	1,072	1,000	906	1,287	1,367	1,262	1,249
Canada	4	3	5	3	13	14	4	6	25	53	94	136	187	179	138
Malaysia	50	116	47	15	10	8	3	6	6	5	3	2	3	4	3
ROW	41	68	28	71	33	7	5	5	0	7	0	58	70	30	12
Total	**840**	**1,246**	**1,211**	**1,102**	**1,177**	**1,034**	**959**	**1,151**	**1,103**	**1,065**	**1,003**	**1,483**	**1,627**	**1,475**	**1,403**

Source: Trade Data Monitor, LLC

Corn: Indonesia is a significant producer of corn for feed but is import-dependent for food-grade corn products due to the aflatoxin content in local corn. Argentine and Brazil have been major suppliers for food grade corn in Indonesia, with price competitiveness being a key factor. In 2024, food-grade corn imports valued at $450 million, a 22 percent increase from 2023, with Argentina and Brazil having a 66 percent and 22 percent market share respectively. U.S. corn is subject to a five percent MFN duty. In 2024, the market share for U.S. corn was almost zero but U.S. corn exports have already reached $36 million January – April 2025.

Figure 5. Indonesia Corn Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

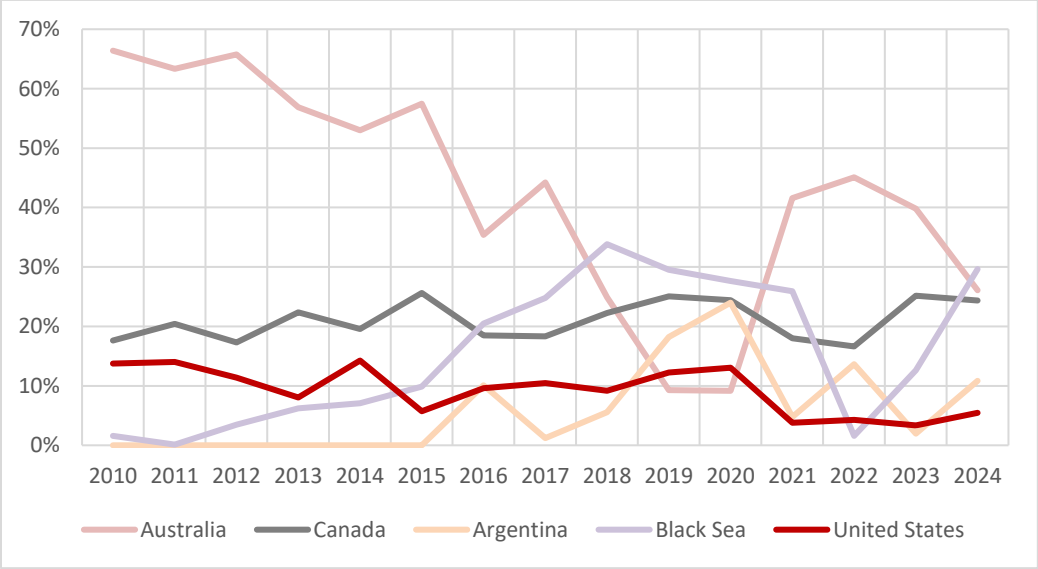
Table 2. Corn Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Brazil	84	83	23	344	311	277	104	19	46	47	35	48	37	175	144
Argentina	189	357	89	131	181	372	60	32	70	160	129	186	312	185	295
United States	48	134	16	8	27	9	63	42	41	3	8	41	33	3	4
ROW	48	455	374	436	292	39	5	22	2	3	1	22	12	4	7
Total	**369**	**1,029**	**502**	**919**	**810**	**697**	**231**	**114**	**160**	**213**	**173**	**297**	**394**	**368**	**450**

Source: Trade Data Monitor, LLC

Wheat: Indonesia is import dependent on wheat with almost no local production. Indonesia's wheat imports reached $3.6 billion in 2024, rising about 155 percent from 15 years ago. Australia has historically been the largest supplier despite declining trends with an increasing market share for Canada, Argentina, and the Black Sea region. Indonesia's instant noodle industry, which is a primary driver for wheat imports, has a strong preference for wheat from Australia, Canada, and the Black Sea region for its color, elasticity, processing suitability, and competitive price. Due to its price and specifications, the food industry uses U.S. wheat mainly for premium noodle products, blended options with other wheat types, and bakery products. Wheat enters duty-free from all origins.

Figure 6. Indonesia Wheat Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

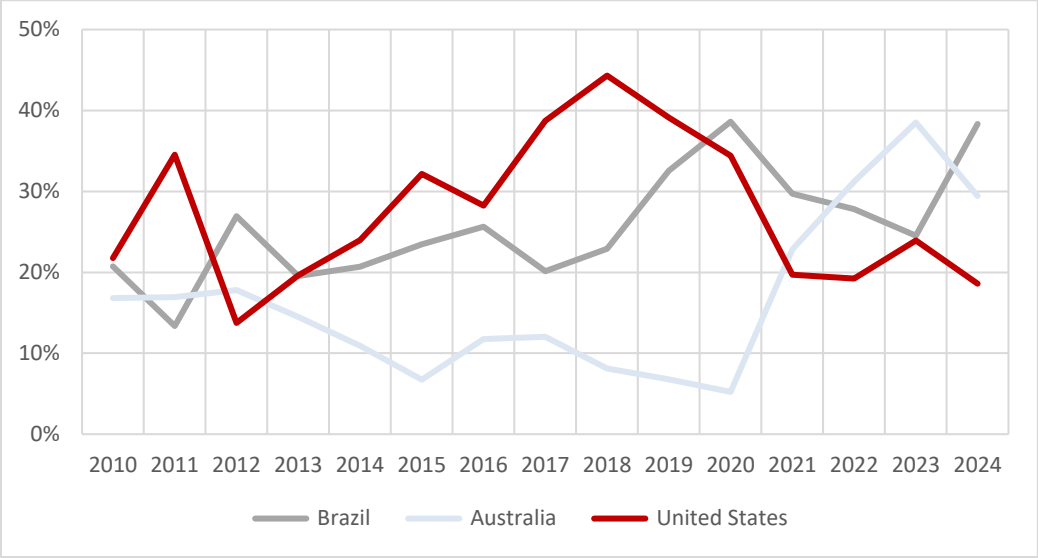
Table 3. Wheat Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Australia	946	1,389	1,482	1,387	1,266	1,197	852	1,171	640	260	240	1,475	1,718	1,497	948
Canada	251	448	389	546	466	534	446	485	572	702	639	639	634	947	885
Argentina	-	-	-	-	-	-	243	31	144	510	628	170	520	75	393
Russia	18	2	13	65	79	62	0	246	292	128	16	1	-	275	376
Ukraine	4	1	66	87	91	144	493	410	578	699	708	919	61	199	700
United States	196	307	256	196	340	119	231	277	236	343	342	135	163	126	198
ROW	9	47	47	158	145	27	143	27	110	158	44	209	714	641	134
Total	**1,424**	**2,194**	**2,253**	**2,440**	**2,387**	**2,083**	**2,408**	**2,648**	**2,571**	**2,799**	**2,616**	**3,548**	**3,810**	**3,758**	**3,635**

Source: Trade Data Monitor, LLC

Cotton: Indonesia is import dependent for cotton with no local production, with total imports reaching $811 million in 2024. The United States is currently the third largest supplier of cotton to Indonesia, reaching $138 million in 2024. However, Indonesia's textile industry is experiencing a sustained downturn, resulting in reduced cotton imports in 2025 to date. Reduced industry performance is due to lower demand from both global and domestic markets for Indonesian textiles and textile products, combined with tight competition in the local market, a weakening rupiah, increased labor costs, and the lack of a clear and consistent regulatory framework (see ID2025-0017). Cotton from all sources enters Indonesia duty free but is price sensitive.

Figure 7. Indonesia Cotton Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

Table 4. Cotton Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Brazil	238	239	359	263	290	255	279	267	330	364	299	328	371	200	311
Australia	193	302	237	195	153	73	128	159	117	76	40	252	416	314	239
United States	250	617	183	264	336	350	307	513	639	437	267	218	256	195	151
ROW	467	628	554	624	622	410	374	386	356	241	168	306	290	106	111
Total	**1,148**	**1,786**	**1,333**	**1,346**	**1,401**	**1,088**	**1,087**	**1,325**	**1,442**	**1,118**	**775**	**1,104**	**1,332**	**815**	**811**

Source: Trade Data Monitor, LLC

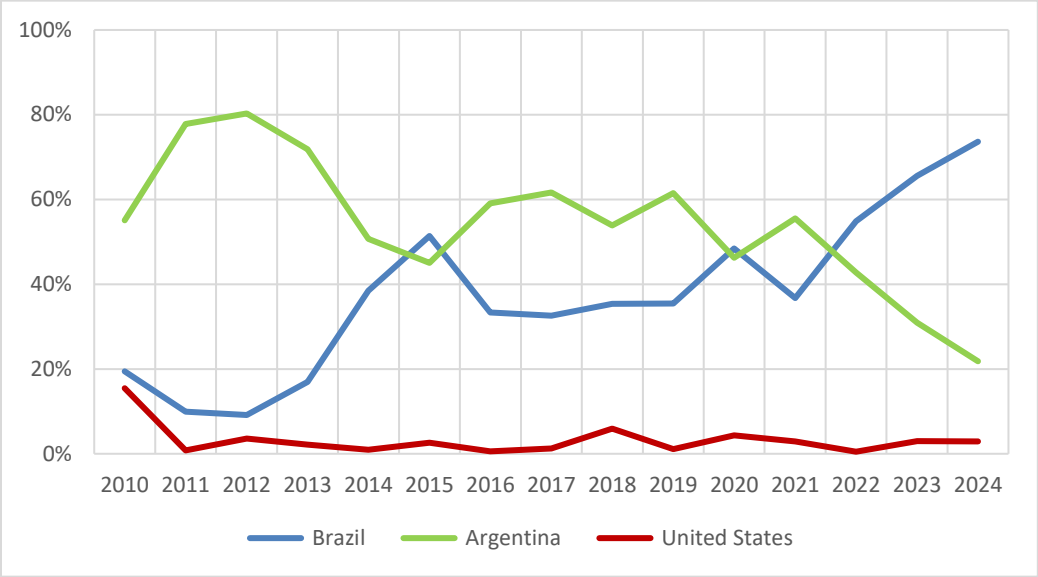
Intermediate Products

Feed ingredients: The poultry feed industry is the key user[3] of feed ingredients such soybean meal, Dried Distillers Grains with Solubles (DDGS), and vegetable fats. With significant dependence on imported ingredients, the capacity of Indonesian feed mills has expanded by 76 percent from 17 MMT in 2015 to 30 MMT in 2024. The local poultry industry association forecasts that the poultry feed demand will increase about 2 percent in 2025/2026 (see ID2025-00016).

Soybean meal: Indonesia is import-dependent for soybean meal and does not have any crush facilities. From 2015 to 2024, soybean meal imports soared 32 percent to 5.4 MMT. Most of the imported soybean meal was of South American origin due to price competitiveness. Soybean meal enters Indonesia duty-free from all origins.

[3] Approximately, 90 percent of feed industry is for poultry (see Indonesia Grain and Feed Annual 2025 GAIN2025-0016).

Figure 8. Indonesia Soybean Meal Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

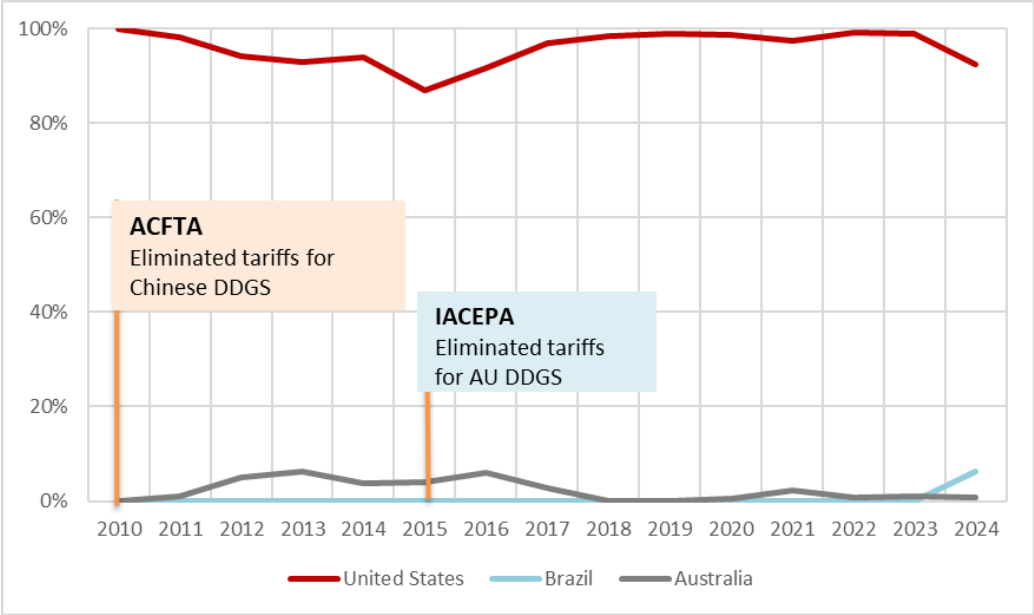
Table 5. Soybean Meal Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Brazil	226	132	168	328	846	935	527	536	725	590	940	987	1,754	1,983	1,892
Argentina	641	1,030	1,472	1,389	1,116	820	934	1,016	1,105	1,024	898	1,492	1,368	935	561
United States	180	11	65	42	21	48	9	20	121	18	84	77	16	90	75
ROW	117	151	128	175	218	16	111	75	100	31	19	129	59	14	41
Total	**1,164**	**1,324**	**1,833**	**1,933**	**2,201**	**1,819**	**1,580**	**1,648**	**2,050**	**1,664**	**1,942**	**2,685**	**3,196**	**3,022**	**2,569**

Source: Trade Data Monitor, LLC

DDGS: Indonesia does not produce DDGS, since local ethanol distillers rely on sugarcane and feed millers use local corn directly. The Indonesian feed industry utilizes DDGS as alternates for soybean meal and corn due to its nutritional value and cost effectiveness. The United States is the major supplier for DDGS due to having a reliable supply, appropriate nutrient profile, and overall suitability for the local feed industry's demands. U.S. and Brazilian DDGS are subject to the 5 percent MFN rate while Australian DDGS enter duty-free.

Figure 9. Indonesia DDGS Imports Market Share, 2010-2024



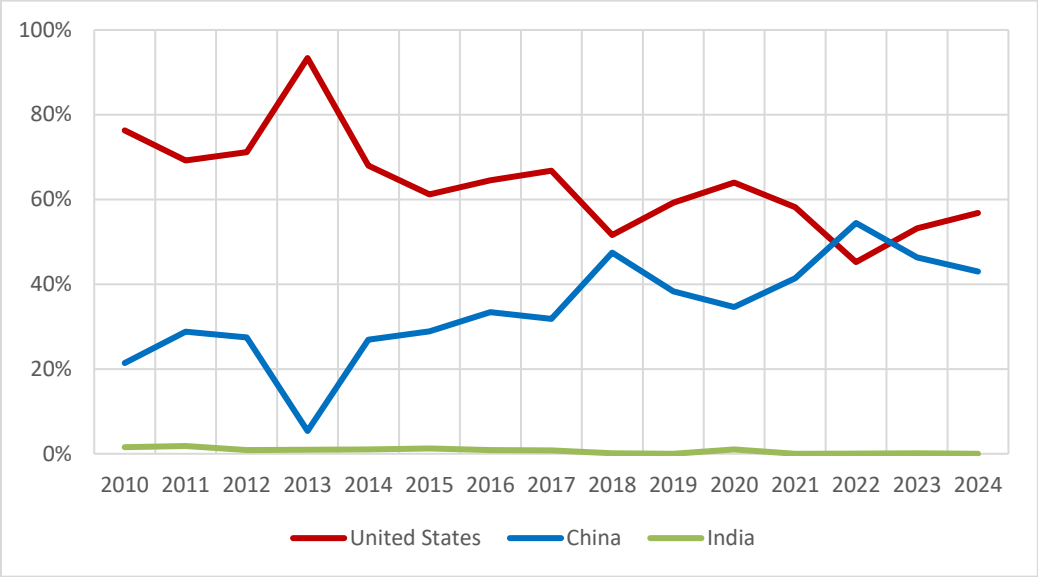
Source: Trade Data Monitor, LLC

Table 6. Distillers Dried Grains with Soluble Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	60	77	72	76	80	63	69	111	164	193	186	237	284	267	255
Brazil	-	-	-	-	-	-	-	-	-	-	-	-	-	-	18
Australia	0	1	4	5	3	3	4	3	0	0	1	5	2	2	2
ROW	0	1	1	1	2	7	2	0	3	2	1	1	0	0	1
Total	**60**	**78**	**77**	**82**	**85**	**72**	**75**	**114**	**166**	**195**	**188**	**243**	**287**	**270**	**276**

Corn gluten meal: The Indonesian feed industry uses corn gluten meal (CGM) for its cost effectiveness and nutrient profile which provides a suitable protein source in poultry, swine, and aquaculture rations. Locally produced CGM from the wet milling industry were unable to fulfill the feed industry demand, creating a market for imported CGM at $165 million in 2024. Subject to the MFN duty of zero percent, the United States remains the largest supplier, followed by China.

Figure 10. Indonesia CGM Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

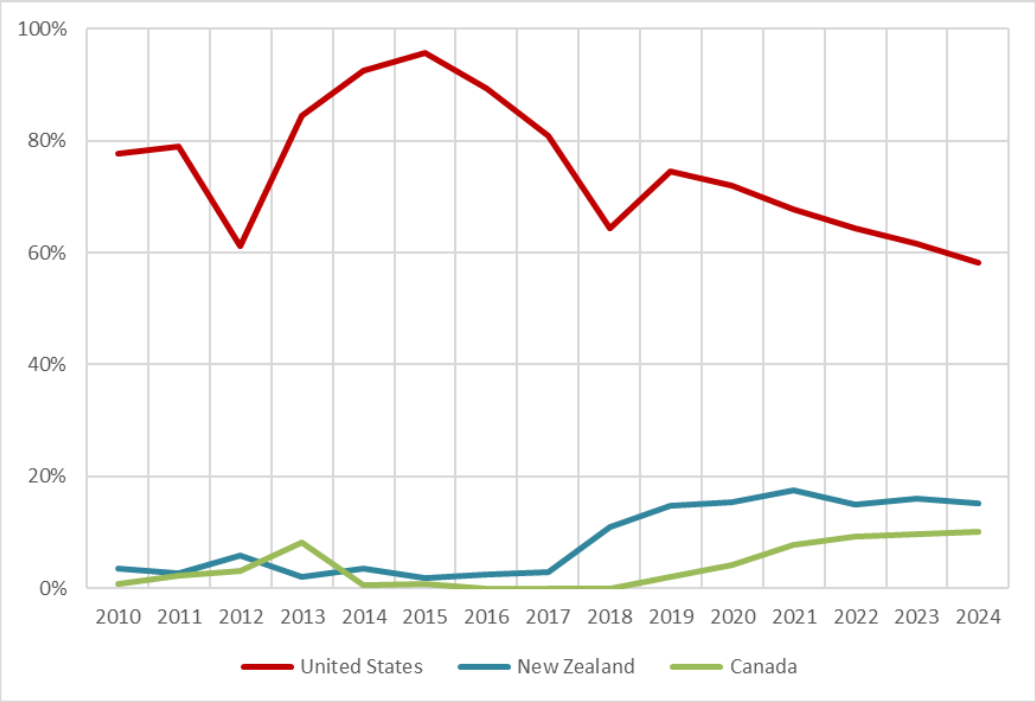
Table 7. Corn Gluten Meal Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	76	81	123	173	153	109	114	146	78	85	76	98	82	100	96
China	21	34	48	10	61	51	59	70	72	55	41	70	99	87	72
India	2	2	1	2	2	2	2	2	0	-	1	0	0	0	-
ROW	1	0	1	1	9	15	2	1	1	3	0	1	0	1	0
Total	**99**	**117**	**173**	**185**	**225**	**178**	**177**	**219**	**151**	**143**	**119**	**168**	**181**	**188**	**168**

Source: Trade Data Monitor, LLC

Meat and bone meal: Indonesia's poultry feed industry uses meat bone meal (MBM) as a cost-effective source for protein and minerals. Expansion of the poultry industry since 2018 has also increased demand for MBM. The United States is key supplier for MBM, followed by New Zealand and Canada. MBM is subject to the MFN duty of zero percent.

Figure 11. Indonesia MBM Imports Market Share, 2010-2024



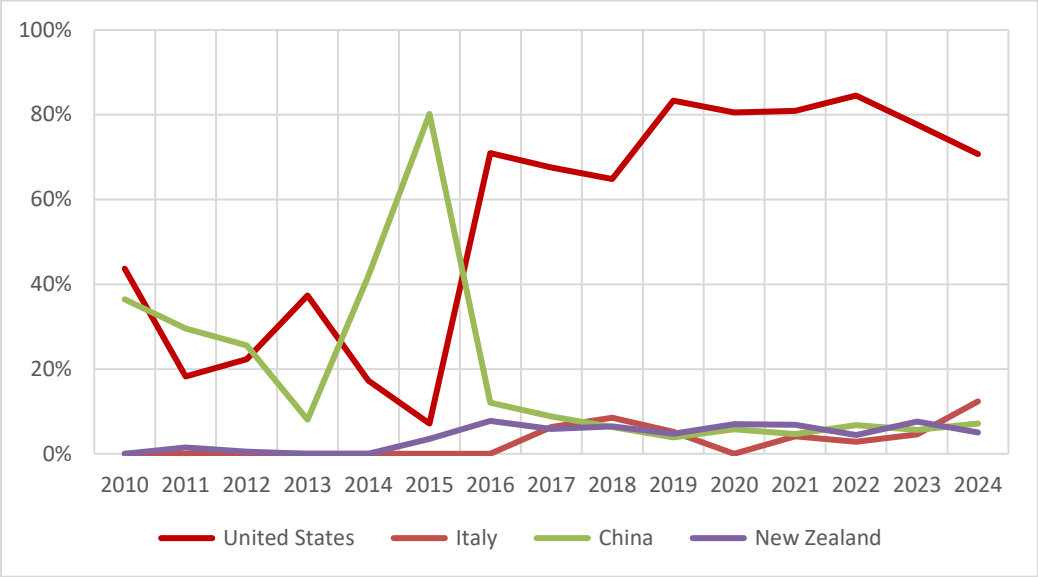
Source: Trade Data Monitor, LLC

Table 8. Meat and Bone Meal Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	28	35	30	60	48	45	27	33	177	186	177	243	250	230	187
New Zealand	1	1	3	1	2	1	1	1	30	37	38	63	58	60	49
Canada	0	1	2	6	0	0	-	-	-	5	10	28	36	36	33
Brazil	-	-	-	-	-	-	-	-	-	-	-	-	-	0	16
Italy	-	-	-	-	-	-	-	2	24	19	19	14	40	33	21
ROW	6	7	15	4	2	1	2	4	44	3	2	10	4	15	15
Total	**36**	**44**	**49**	**71**	**52**	**47**	**31**	**41**	**275**	**250**	**246**	**359**	**389**	**373**	**321**

Feather meal: In addition to the poultry feed sector, aquaculture has driven the demand for feather meal due to its cost-effectiveness and protein content. Especially for shrimp, the feed industry prefers feather meal to build the feed's amino acid profile. In 2024, the feather meal market reached $36 million, with the United States remaining as the largest supplier. The MFN import duty for feather meal is zero percent.

Figure 12. Indonesia Feather Meal Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

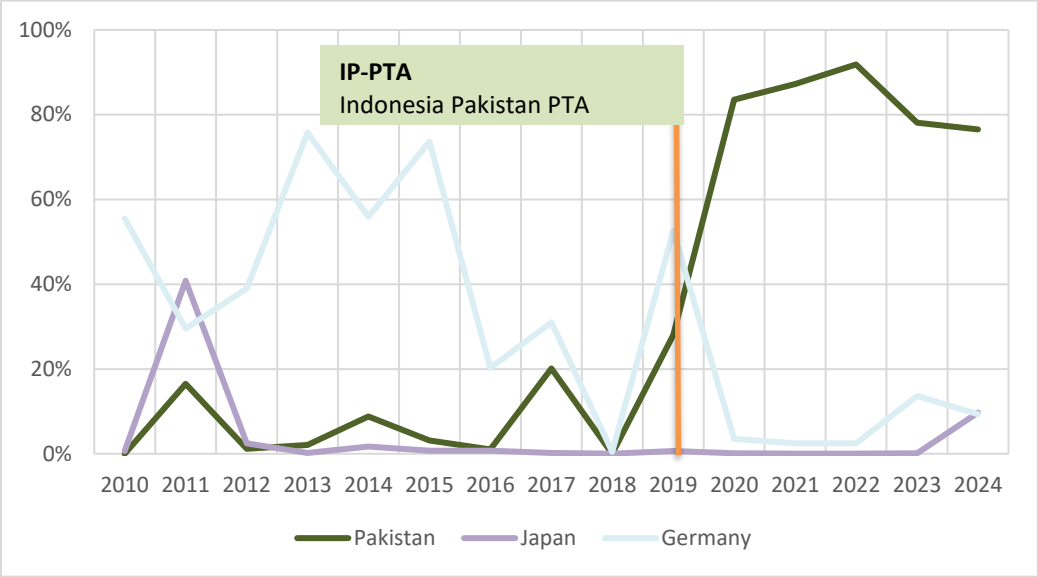
Table 9. Feather Meal Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	3	1	2	3	1	0	15	21	24	24	20	28	31	33	25
Italy	-	-	-	-	-	-	-	2	3	2	-	1	1	2	4
China	2	2	3	1	2	2	3	3	2	1	1	2	3	2	3
New Zealand	-	0	0	-	-	0	2	2	2	1	2	2	2	3	2
ROW	1	4	5	5	2	0	2	4	5	1	2	1	1	2	2
Total	**6**	**7**	**11**	**8**	**5**	**2**	**22**	**31**	**36**	**29**	**24**	**34**	**37**	**43**	**36**

Ethanol: While Indonesia does not currently have a significant ethanol industry, this remains a key opportunity. In 2019, the Indonesia Pakistan Preferential Trade Agreement (IPPTA) eliminated the 30 percent MFN tariff for ethanol[4], resulting in Pakistan having 77 percent to 92 percent market share for ethanol in the last five years. Indonesia's ethanol imports reached a peak of $36 million in 2021 due to pandemic-related demands and then decreased to $8 million in 2024. The market for fuel-grade ethanol remains limited since the bioethanol mandatory blending program remains inactive, leading to a small demand for E5. U.S. ethanol currently has a 0 percent market share due to being subject to the 30 percent MFN duty.

[4] Most of the ethanol imported by Indonesia was non-fuel grade, including from Pakistan.

Figure 13. Indonesia Ethanol Imports Market Share, 2010-2024



Source: Trade Data Monitor, LLC

Table 10. Ethanol Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Pakistan	-	0	0	0	0	0	0	1	-	0	19	36	24	4	8
Japan	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
Germany	1	1	0	1	0	0	0	1	0	1	1	1	1	1	1
Australia	0	-	-	0	-	-	0	-	-	0	-	0	0	0	0
S Korea	0	-	-	-	-	-	0	0	-	0	0	0	0	0	0
ROW	0	0	0	0	0	0	1	2	53	0	3	4	1	0	0
Total	**1**	**2**	**0**	**2**	**1**	**1**	**2**	**4**	**53**	**1**	**23**	**42**	**26**	**5**	**11**

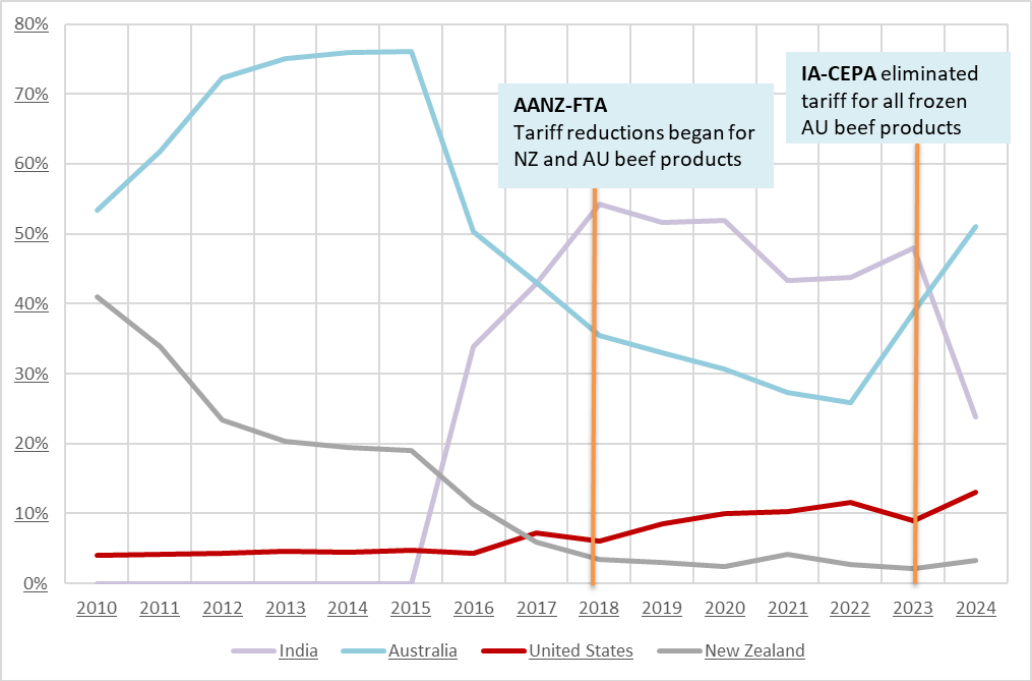
Source: Trade Data Monitor, LLC

Consumer-Oriented Products

Beef: The sizable middle and upper classes preferences are the main demand drivers for beef products. Bovine meat demand rose in the last decade, driving imports from 43 thousand MT in 2015 to a peak of 200,000 MT in 2023. Major suppliers for bovine meat were beef from Australia, the United States, Brazil, and New Zealand and buffalo meat from India. Under free trade agreements, bovine meat from the following origins is subject to zero duties: Australia, New Zealand, Korea, Japan, and China, as well as EFTA and ASEAN members (see Annex 3). U.S. beef is subject to the MFN duty, which is 5 percent.

Imports of frozen beef products from Australia benefited from the ASEAN Australia New Zealand FTA (AANZFTA) and the Indonesia Australia Comprehensive Economic Partnership Agreement (IACEPA) agreements. These agreements initiated tariff reductions on Australian (AU) beef in 2018, eliminated tariffs on the majority of beef products in 2020, and eliminated tariffs on other frozen beef cuts in 2023. However, less-transparent issuance of import licenses and price differentials impacted market share.

Figure 14. Market Share of Frozen Beef, 2010-2024



Source: Trade Data Monitor, LLC

Table 11. Frozen Boneless Beef Imports by Origin ($ million)

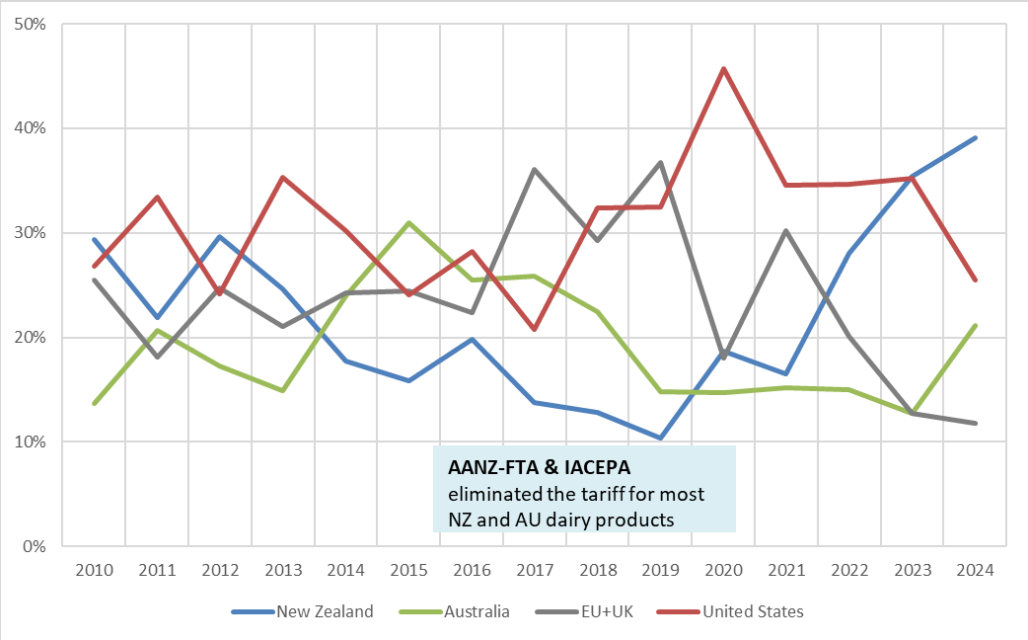
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
India	-	-	-	-	-	-	141	166	284	310	264	288	322	349	136
Australia	146	126	90	135	211	152	211	167	186	198	156	181	190	282	291
United States	11	9	5	8	13	10	18	28	32	51	50	68	86	65	74
New Zealand	112	69	29	37	54	38	47	23	18	18	12	28	20	15	19
ROW	5	0	-	0	0	0	1	4	4	23	26	99	117	15	50
Total	**273**	**204**	**124**	**180**	**278**	**200**	**418**	**388**	**523**	**600**	**508**	**665**	**735**	**726**	**570**

Source: Trade Data Monitor, LLC

Dairy: Like beef, the sizable middle class and upper-class preferences are the main demand drivers for dairy products. As Indonesia's dairy production is currently below the national demand, imports of dairy products since 2015 peaked at 700,000 MT in 2019, 69 percent higher than 2015. In 2024, Indonesia's dairy product imports reached only 610,000 MT, primarily from New Zealand, the United States, and Australia. An outbreak of foot and mouth disease in 2022 disrupted local production and increased Indonesia's reliance on imports. About 75 percent of dairy products imported to Indonesia are skim milk powder, whey, malt extract products, and lactose.

Under the AANZFTA and IACEPA agreements, the majority of dairy products originating from New Zealand and Australia have been subject to zero import duties since 2020. Tariffs on certain dairy products, specifically liquid milk with a fat content of less than 6 percent (HS codes 0401.1 and 0401.2), are scheduled to be fully eliminated by 2033. U.S. dairy products are subject to the MFN duty, which is 5 percent.

Figure 15. Market Share of Skimmed Milk Powder, 2010-2024



Source: Trade Data Monitor, LLC

Table 12. Skimmed Milk Powder Imports ($ million)

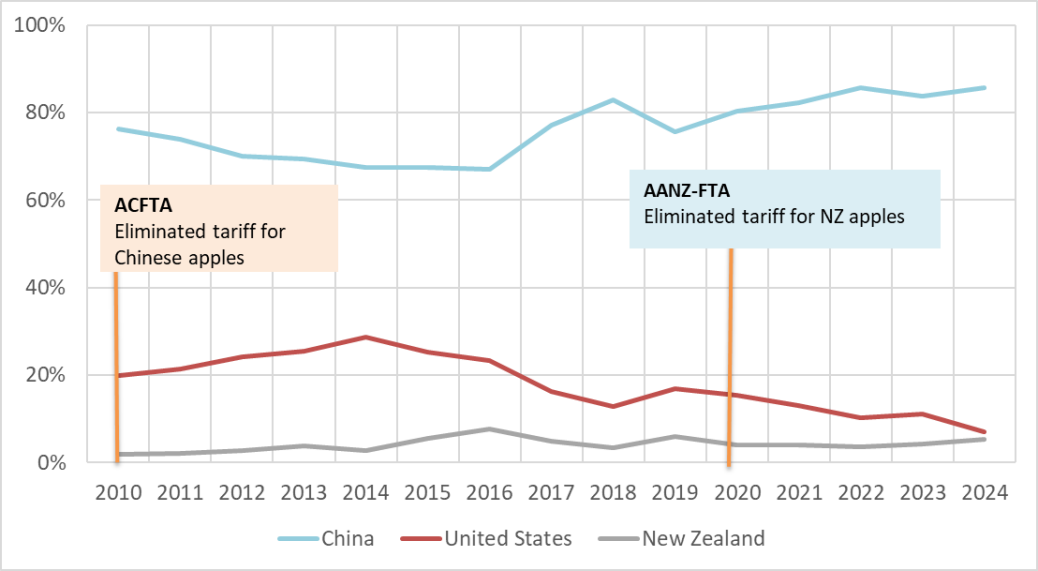
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
New Zealand	119	97	127	149	115	61	65	47	42	46	101	98	242	211	222
United States	109	148	104	214	196	93	92	71	105	143	248	206	298	210	145
Australia	56	91	74	90	155	120	83	89	72	66	80	90	129	76	120
EU+UK	103	80	106	128	157	94	73	124	94	162	98	180	173	76	67
ROW	18	26	18	25	25	18	13	12	10	24	15	21	19	23	14
Total	**405**	**442**	**429**	**606**	**649**	**386**	**327**	**344**	**323**	**442**	**542**	**596**	**860**	**596**	**567**

Source: Trade Data Monitor, LLC

Fruit: While tropical fruit is inexpensive and widely available, the sizable middle class and upper class have a significant demand for imported apples, oranges, and grapes. Import volumes increased from approximately 400,000 metric tons in 2015 to 700,000 metric tons in 2024. China, benefiting from the ASEAN-China Free Trade Agreement (ACFTA) implemented in 2010 and improved quality, remains the largest supplier of fresh fruit with a 73 percent market share, followed by Thailand, the United States, and Australia. However, certain fresh fruit from specific origins—such as mandarins and lemons from Australia and New Zealand—are still subject to either high tariffs or tariff rate quotas (TRQs).

Apples: Apples are the third-largest fresh fruit imported to Indonesia after grapes and pears, valued at $318 million in 2024. Apples from several origins have duty-free access via free trade agreements including China, New Zealand, Thailand, Japan, and Australia. In 2024, nearly 86 percent of apple imports were of Chinese origin, followed by the United States (7 percent) and New Zealand (5 percent). Apples from China (since 2010) and New Zealand (since 2020) enter duty free; U.S. apple exports are subject to the MFN tariff of 5 percent and were valued at $23 million in 2024.

Figure 16. Market Share of Apples, 2010-2024



Source: Trade Data Monitor, LLC

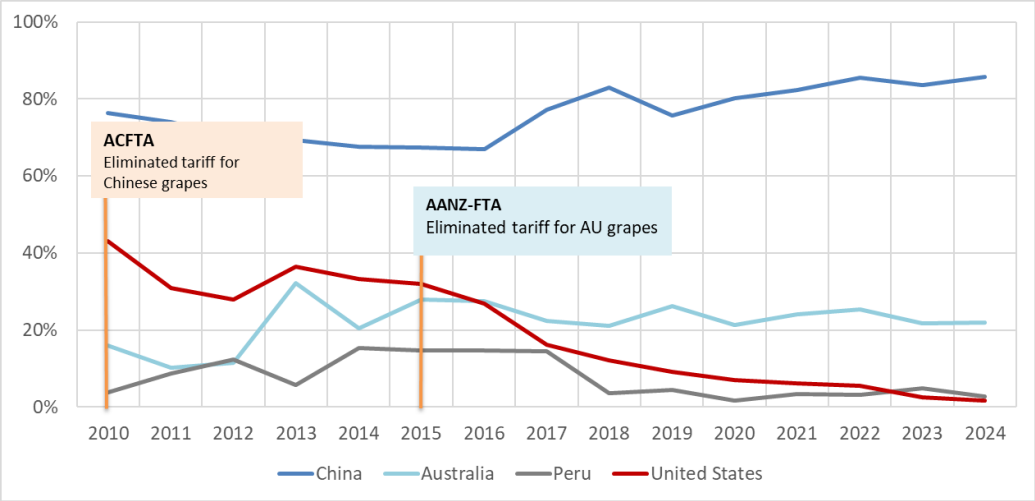
Table 13. Apple Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	128	138	119	122	135	94	176	243	295	258	262	308	304	230	272
United States	33	40	41	45	57	35	62	51	45	57	50	48	36	31	23
New Zealand	3	4	5	7	6	8	20	15	12	20	13	15	12	11	17
ROW	3	5	5	3	2	3	5	6	4	5	1	2	3	3	6
Total	**168**	**186**	**171**	**176**	**200**	**139**	**264**	**315**	**356**	**342**	**326**	**374**	**356**	**275**	**318**

Source: Trade Data Monitor, LLC

Grapes: Grapes are the top imported fruit in Indonesia, with preferential tariffs significantly impacting the market share. ACFTA tariff elimination in 2010 helped boost Chinese fresh grape exports to Indonesia from $26 million in 2015 (about 19 percent market share) to $306 million in 2024 (70 percent market share). In the same period, U.S. grape exports fell from $45 million (32 percent of market share) to $7 million (2 percent market share). Australian grapes have also entered duty free since 2015, helping it maintain a 22 percent market share in 2024. U.S. grapes are subject to the MFN duty of 5 percent.

Figure 17. Market share of Grapes, 2010-2024



Source: Trade Data Monitor, LLC

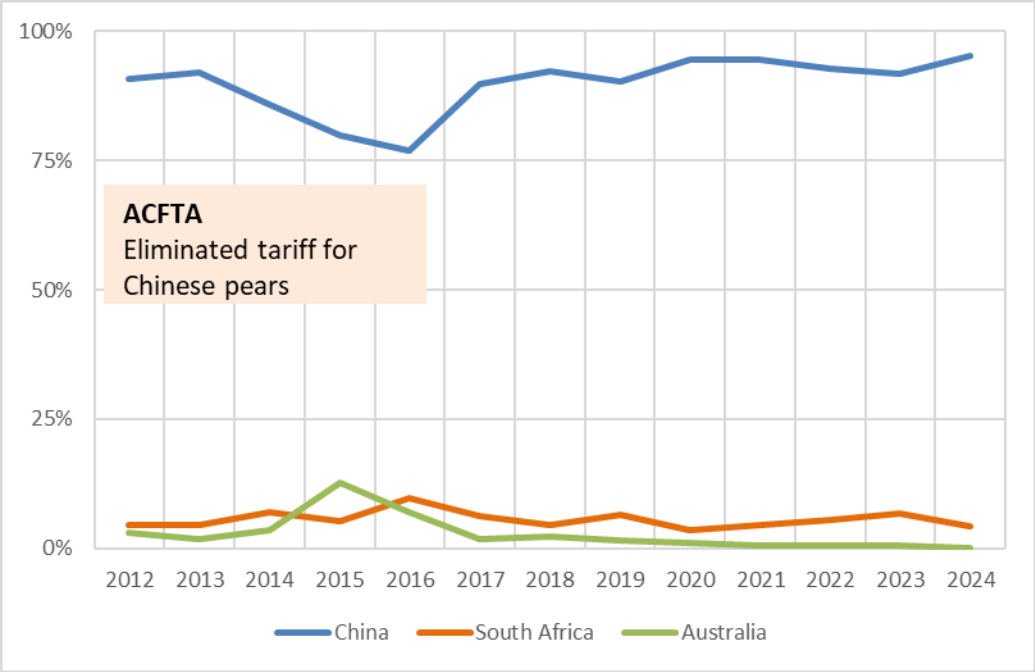
Table 14. Grapes Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	15	20	23	16	28	26	50	92	173	188	181	172	186	266	306
Australia	13	12	14	32	31	39	54	56	66	98	58	76	84	87	96
Peru	3	10	15	6	23	21	29	36	11	17	5	11	10	20	12
United States	35	35	34	37	50	45	53	41	38	34	19	19	19	10	7
ROW	15	36	36	10	19	10	11	27	24	35	10	38	32	18	15
Total	**81**	**113**	**123**	**101**	**151**	**139**	**197**	**252**	**311**	**373**	**273**	**315**	**330**	**400**	**436**

Source: Trade Data Monitor, LLC

Pears: Pears were the second-largest fresh fruit imported to Indonesia in 2024, valued at $320 million and more than doubling since 2015. Chinese pears, which have entered duty free since 2010, dominate the market with a 93-95 percent market share over the past five years. The second-largest supplier is South Africa with a 4-6 percent of market share. Indonesia imported pears from the United States valued at $53 thousand in 2024, decreasing from a 2014 peak of $743 thousand. Pears from China, Australia, and Korea enter zero duty free while pears from South Africa and the United States are subject to the MFN duty of 5 percent.

Figure 18. Market share of Pears, 2012-2024



Source: Trade Data Monitor, LLC. Note: The HS Code for pears is unavailable before 2012

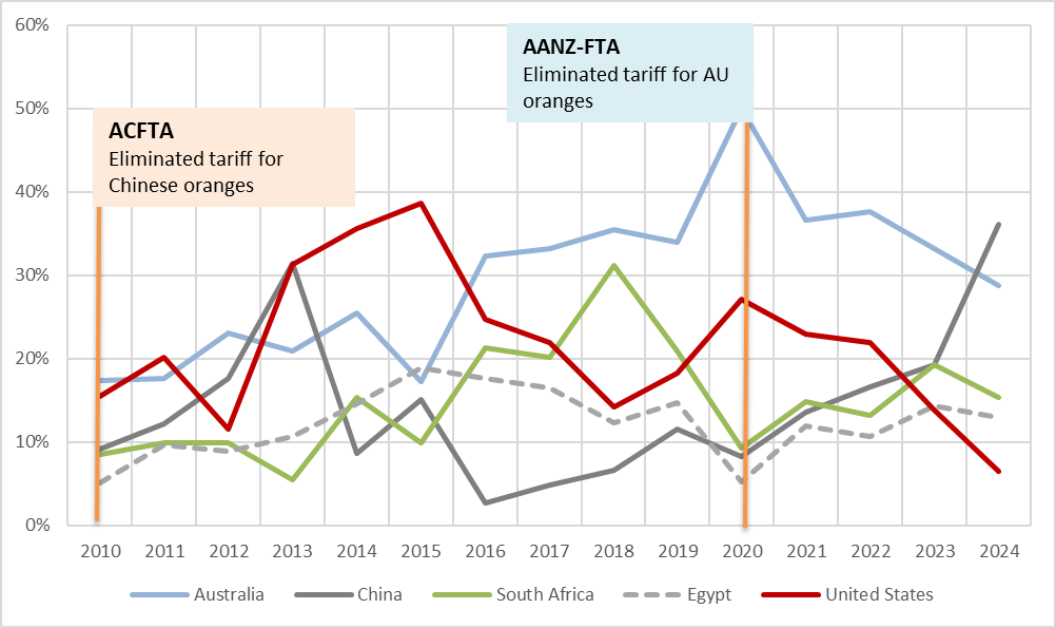
Table 15. Pear Imports by Origin ($ million)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	95	101	67	78	85	182	234	213	285	300	244	226	305
South Africa	5	5	5	5	11	13	12	15	11	14	15	17	14
Australia	3	2	3	12	8	4	6	3	3	2	1	1	0
ROW	2	2	3	2	7	4	2	4	2	2	3	3	1
Total	**105**	**109**	**79**	**97**	**110**	**203**	**254**	**236**	**302**	**317**	**263**	**246**	**320**

Note: The HS code for pears is not available before 2012

Oranges: Indonesia's orange imports grew significantly from $17 million in 2015 to $37 million in 2024. While U.S. oranges had the largest market share (39 percent) in 2015, increased competition reduced its market share to 7 percent in 2024, valued at $7 million. Chinese and Australian oranges enter duty free while South African and U.S. oranges are subject to the 5 percent MFN duty. In 2024, Indonesia's orange imports were from China (36 percent), Australia (29 percent) and South Africa (15 percent).

Figure 19. Market Share of Oranges, 2010-2024



Source: Trade Data Monitor, LLC

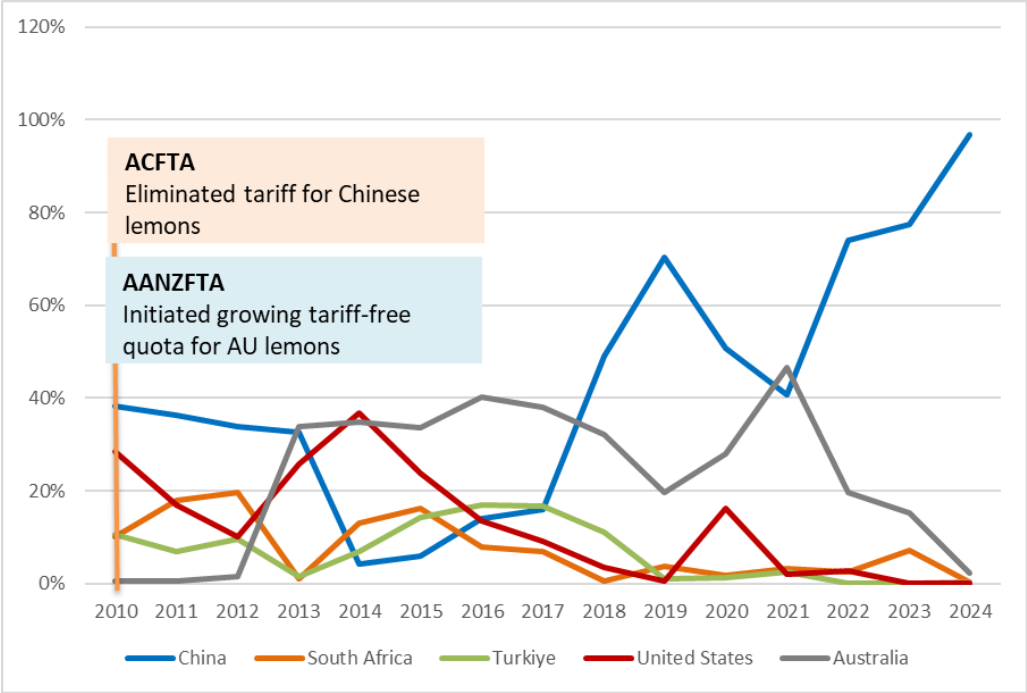
Table 16. Orange Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Australia	4	4	6	4	5	3	5	6	7	9	12	12	11	11	11
China	2	3	5	6	2	3	0	1	1	3	2	4	5	6	13
South Africa	2	2	3	1	3	2	3	4	6	6	2	5	4	6	6
Egypt	1	2	2	2	3	3	3	3	3	4	1	4	3	5	5
United States	4	5	3	6	7	7	4	4	3	5	6	7	7	4	2
ROW	11	8	8	0	0	0	0	1	0	0	0	-	0	0	0
Total	**24**	**25**	**26**	**19**	**19**	**17**	**15**	**19**	**21**	**27**	**23**	**32**	**30**	**32**	**37**

Source: Trade Data Monitor, LLC

Lemons: Indonesia's market for imported lemons was valued at $24 million in 2024, representing a 41 percent increase compared to the previous year. The primary suppliers include China, Australia, South Africa, and Türkiye. Lemon exports from the United States reached a peak of $5 million in 2020. Australian lemons were subject to import tariffs until 2015 when they began entering duty free under a quota within the AANZFTA framework. In 2020, a duty-free quota of 5,000 MT was established for Australian lemons under IA-CEPA, with the quota volume increasing by 2.5 percent annually and reaching 5,657 MT in 2024. Since 2021, lemons originating from China have gained a larger market share, driven by large-scale production, zero import duty (quota-free) under the ACFTA, and growing demand from the beverage industry. U.S. lemons are subject to the 5 percent MFN duty.

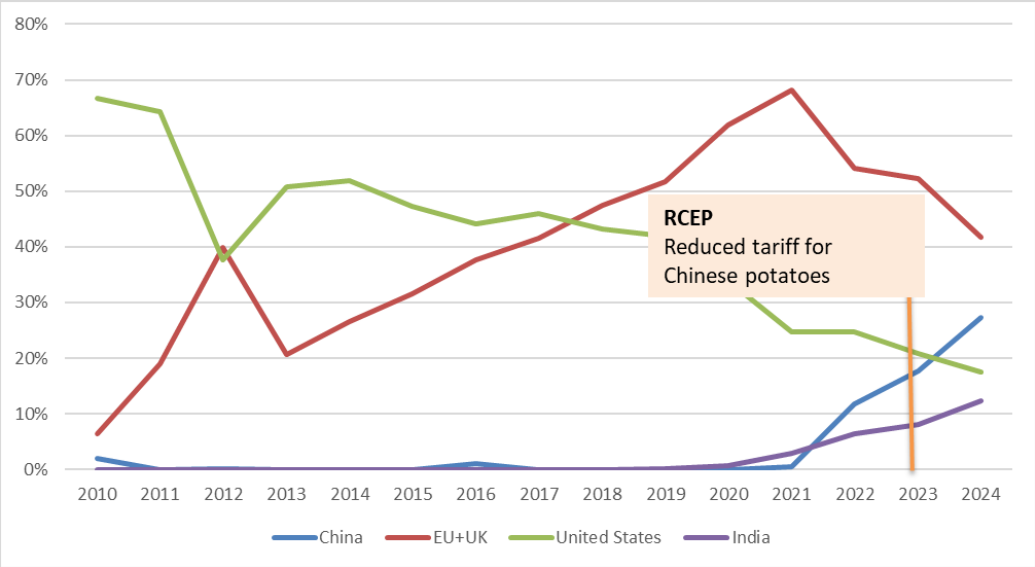
Figure 20. Market Share of Lemons, 2010-2024



Source: Trade Data Monitor, LLC

Potato Products: Indonesia's imports of potato products have seen significant diversification over the years. The United States, Belgium, and Netherlands have been steady suppliers for decades, providing high-quality frozen potato fries and processed potatoes to meet the growing demands of the Indonesian foodservice and retail sectors. However, in 2021, China and India emerged as notable players. Due to competitive prices, closer proximity, and lower tariffs via the Regional Comprehensive Economic Partnership (RCEP) agreement, Chinese potato products claimed 27 percent of the market in 2024 (valued at $30 million), rising from nearly from zero percent in 2021 (valued at $400,000). U.S. potatoes are subject to the 5 percent MFN tariff, while Chinese potatoes began entering duty free in 2023.

Figure 21. Market Share of Potato Products, 2010-2024



Source: Trade Data Monitor, LLC

Table 17. Potato Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	0	-	0	-	-	-	1	-	-	-	-	0	13	25	30
EU+UK	1	3	9	8	10	13	17	22	27	40	42	58	60	73	46
United States	7	10	9	20	20	20	20	25	25	32	23	21	27	29	19
India	-	-	-	-	-	-	-	-	-	0	0	2	7	11	14
ROW	3	3	5	11	8	9	8	7	5	5	2	3	3	2	1
Total	**11**	**16**	**23**	**39**	**38**	**41**	**45**	**54**	**57**	**77**	**67**	**85**	**111**	**140**	**111**

Source: Trade Data Monitor, LLC

Agricultural Related Products

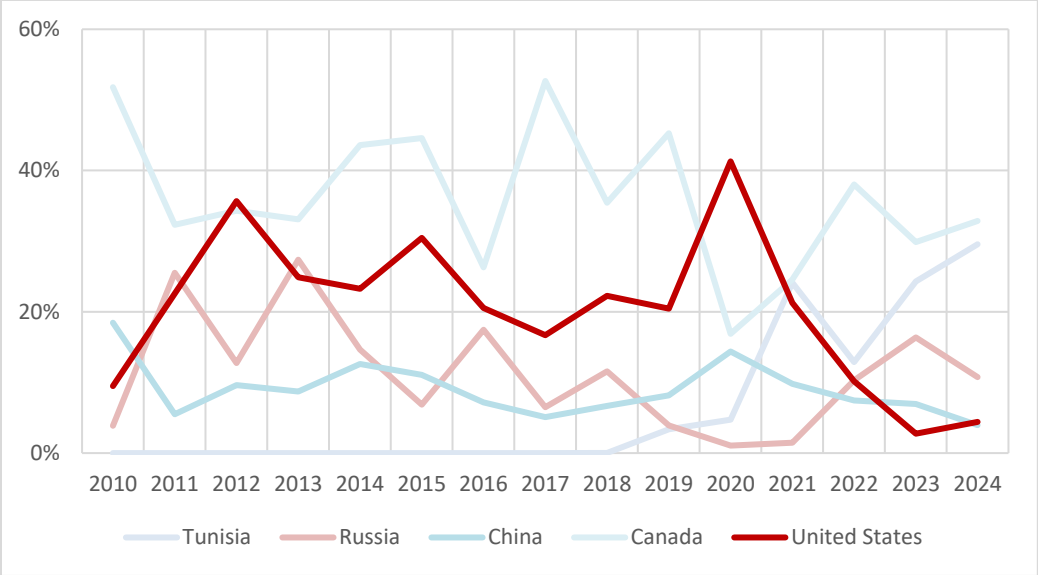
Seafood: While Indonesia is a significant seafood producer, its consumers demand both local seafood and imported varieties not produced domestically. The demand for seafood imports has risen from both Indonesian food processing and high-end customers, such as food service and retail outlets in urban areas. Key seafood products imported to Indonesia include frozen cod, crab, flatfish, and salmon, all subject to the MFN tariff of 5 percent with a total market value of $103 million in 2024. In addition to growing demands from high-end customers such hotels, restaurants, and retail outlets in urban areas, Indonesia is also increasingly importing, processing, and re-exporting U.S. seafood. U.S. seafood exports to Indonesia were valued at $43 million in 2024, with significant increases in cod, yellowfin, and pollock.

Table 18. Frozen Cod Imports by Origin ($ million)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Russia	-	-	-	-	-	0	0	5	9	20	51	24	8
Japan	-	-	-	-	-	0	-	-	-	-	0	1	3
United States	0	1	0	1	2	1	1	0	0	0	4	6	14
New Zealand	-	-	-	-	-	-	-	-	-	-	-	-	0
Thailand	-	-	-	-	-	-	-	-	-	-	-	-	0
ROW	0	0	1	0	0	0	-	0	2	0	5	6	4
Total	**0**	**1**	**2**	**1**	**3**	**1**	**1**	**6**	**11**	**20**	**61**	**36**	**29**

The frozen crab market reached $53 million in 2024, with the three largest suppliers being Tunisia ($16 million), Canada ($12 million), and Russia ($ 6 million). Frozen crab imports from the United State were valued at $2 million in 2024, a decrease from $21 million in 2020, largely due to crab population decline, falling prices, and fishery closures.

Figure 22. Market Share of Frozen Crab, 2010-2024



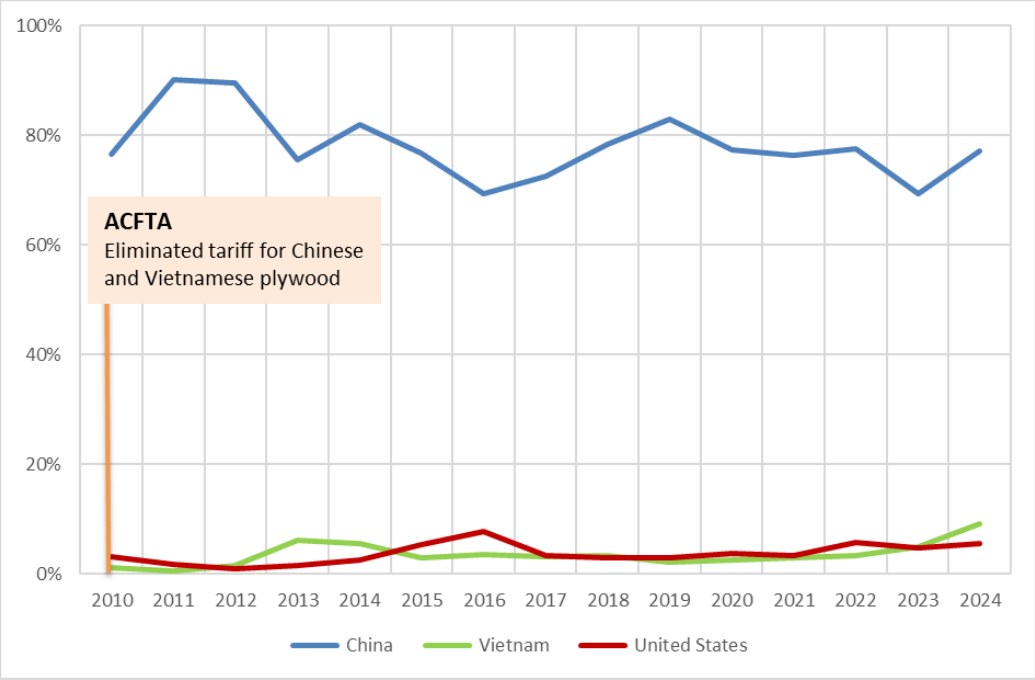
Source: Trade Data Monitor, LLC

Wood: Wood products is one of Indonesia's major export industries. However, Indonesia's wood industry employs multiple U.S. wood products subject to a zero percent MFN duty, such lumber and veneer. For plywood, since imports compete with local production, the MFN tariff is set at 10 percent. The combined market of imported lumber, veneer and plywood is valued at $254 million, recovering 8 percent from the previous year following improved demands in global markets. In the lumber market, the United States had an approximately 20 percent market share in 2024, followed by New Zealand and China. Indonesia sourced veneer in 2024 mainly from China ($70 million) and the United States ($10 million), and Vietnam ($ 7 million). Chinese plywood topped the Indonesian market with exports valued at $24 million in 2024, followed by Vietnam and the United States at $3 million and $2 million respectively.

Table 19. Lumber Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	31	40	35	41	42	37	38	39	48	38	27	39	47	26	25
Chile	2	2	3	5	6	2	2	1	3	5	13	10	10	11	12
China	4	4	4	4	4	6	3	4	5	7	7	14	10	8	11
New Zealand	20	20	18	15	18	21	22	24	26	19	16	18	18	17	12
Canada	5	7	7	4	4	6	6	9	10	9	9	14	17	7	7
ROW	33	36	31	30	36	41	38	50	54	57	46	62	71	48	58
Total	**95**	**110**	**96**	**98**	**110**	**113**	**109**	**127**	**146**	**135**	**119**	**156**	**173**	**117**	**125**

Figure 23. Market Share of Plywood, 2010-2024



Source: Trade Data Monitor, LLC

Table 20. Plywood Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	28	60	63	43	38	28	20	22	27	36	28	37	43	27	24
Vietnam	0	0	1	3	3	1	1	1	1	1	1	1	2	2	3
United States	1	1	1	1	1	2	2	1	1	1	1	2	3	2	2
Taiwan	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
Hong Kong	-	0	0	0	1	1	1	0	0	0	0	0	0	0	0
ROW	7	5	6	9	4	4	4	5	5	4	5	7	6	7	2
Total	**37**	**67**	**71**	**57**	**46**	**36**	**29**	**30**	**35**	**44**	**36**	**48**	**55**	**40**	**31**

Source: Trade Data Monitor, LLC

TARIFF PREFERENCE SUMMARY

As demonstrated above, tariff preferences play a key role in the market share for many commodities. For products which enter duty free on an MFN basis, U.S. commodities tend to have a much larger market share (see Table 21). However, once the MFN tariff exceeds 5 percent, U.S. market share tends to drop significantly in this generally price-sensitive market.

Table 21. Market Value of Select Products with MFN, Preferential Tariff

Tariff	Market Value in 2024 ($ billion)	Market Value based on U.S.-origin market share ($ billion)			Products
		Niche (< 20%)	Major (20-60%)	Leader (> 60%)	
MFN at 0 percent	9.2	7.5	0.3	1.4	Bulk, some feed ingredients, wood products
MFN at 5 percent and higher. Preferential tariff available for non-US origins	4.7	3.4	1	0.3	Dairy, Beef, Horticulture products, fish, intermediate products, Processed products

Note: Market value in above table refers to Indonesia imports value excluding sugar cane, rice, cocoa, tobacco and other products. "Niche" refers to market share with less than 20 percent, "Leader" is more than 60 percent and "Major" is in between. Source: TDM

Table 22. Tariff-Competing Origins

Products	Import license, Quota	Preferential tariff	Tariff-competing origins	Market value ($ million)
Dairy	✓	0% - 2.9 %	Australia, New Zealand	1,806
Beef and beef products	✓	0% - 4 %	Australia, New Zealand	806
Fruit	✓	0% - 18.75%	China, Thailand	1,508
Feed Ingredients	✓	0% - 2.9%	New Zealand, Canada, China	689
Processed Products	✓	0% - 4%	China, India	383
Seafood	✓	0% - 4%	Japan, New Zealand, Chile	166
Wood Products	✓	0% - 4%	Chile, China, New Zealand	254

ANNEX 1: Taxes and Tariff for U.S. Products Exported to Indonesia (Subject to MFN Tariff)

No	Product	HS Code	VAT	Income Tax	MFN Tariff	2025 Preferential tariff	2024 Import Value ($ million)	2024 share of US Origin
1	Skimmed Milk Powder	040210	12%	2.5% - 7.5%	5%	0% - 2.1%	567	25%
2	Whole Milk Powder	040221	12%	2.5% - 7.5%	5%	0% - 2.9%	243	0%
3	Whey and Whey Products	040410	12%	2.5% - 7.5%	5%	0% - 2.9%	203	27%
4	Cheese and Curd	0406	12%	2.5% - 7.5%	5%	0%	148	12%
5	Frozen Bone in Meat	020220	0%	2.5% - 7.5%	5%	0% - 4%	71	10%
6	Frozen Boneless Beef	020230	0%	2.5% - 7.5%	5%	0% - 3.5%	570	13%
7	Tongues of Bovine Animals	020621	0%	2.5% - 7.5%	5%	0% - 4%	52	3%
8	Offal of Bovine Animals	020629	0%	2.5% - 7.5%	5%	0% - 4%	49	11%
9	Grapes	080610	0%	2.5% - 7.5%	5%	0% - 2.9%	436	2%
10	Apples	080810	0%	2.5% - 7.5%	5%	0% - 2.9%	318	7%
11	Pears	080830	0%	2.5% - 7.5%	5%	0% - 2.9%	320	0%
12	Mandarins	080521	0%	2.5% - 7.5%	20%	0% - 18.75%	199	0%
13	Lemons	080550	0%	2.5% - 7.5%	5%	0% - 2.9%	24	0%
14	Oranges	080510	0%	2.5% - 7.5%	5%	0% - 2.9%	37	7%
15	Potato, incl French fries	200410	12%	2.5% - 7.5%	5%	0%	111	18%
16	Protein concentrate	210610	12%	2.5% - 7.5%	5%	0%	45	32%
17	Dried Onion	071220	12%	2.5% - 7.5%	5%	0% - 4%	33	18%
18	Tomatoes paste	20029	12%	2.5% - 7.5%	5%	0% - 2%	22	10%
19	Starch dextrin	35051	12%	2.5% - 7.5%	5%	0% - 2%	172	8%
20	Wine	220421	12%	7.5%	90%	90%	12	5%
21	Corn	1005	0%	2.5% - 7.5%	5%	0% - 3.5%	450	1%
22	Cotton	5201	12%	2.5% - 7.5%	0%	0%	811	19%
23	Wheat	1001	0%	0.5% - 7.5%	0%	0%	3635	5%
24	Soybean	1201	0%	0.5% - 7.5%	0%	0%	1403	89%
25	Soybean Oil	1507	12%	2.5% - 7.5%	5%	0% - 2.9%	46	0%
26	Ethanol	2207	12%	2.5% - 7.5%	30%	0% - 25.2%	11	0%
27	Day Old Chick	010511	0%	2.5% - 7.5%	0%	0%	39	84%
28	Soybean Meal	230400	0%	2.5% - 7.5%	0%	0%	2569	3%
29	Meat Bone Meal	230110	0%	2.5% - 7.5%	0%	0%	321	58%
30	Feed Prep	230990	0%	2.5% - 7.5%	5%	0% - 2.5%	209	19%
31	DDGS	230330	0%	2.5% - 7.5%	5%	0% - 2.9%	276	92%
32	CGM	230310	12%	2.5% - 7.5%	5%	0%	168	57%
33	Feather meal	050590	0%	2.5% - 7.5%	5%	0%	36	71%

34	Lumber	4407	12%	2.5% - 7.5%	0%	0%	125	20%
35	Veneer	4408	12%	2.5% - 7.5%	0%	0%	98	10%
36	Plywood	4412	12%	2.5% - 7.5%	10%	0% - 5%	31	6%
37	Frozen Cod Fish	030363	0%	2.5% - 7.5%	5%	0% - 4%	29	48%
38	Frozen Crab	030614	12%	2.5% - 7.5%	5%	0% - 3%	53	4%
39	Frozen Flatfish	030339	0%	2.5% - 7.5%	5%	0% - 3.5%	8	100%
40	Frozen Salmon	030312	0%	2.5% - 7.5%	5%	0% - 3.5%	13	28%

Source: TDM, MOT

ANNEX 2: Key Suppliers and Market Size of Indonesia's Imports of Select Other Commodities

I. Dairy Products

Table 23. Whole Milk Powder Imports ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
New Zealand	49	107	108	101	142	85	88	113	144	154	147	199	378	272	272
Australia	32	35	23	32	16	5	3	1	1	1	0	8	3	2	2
EU+UK	22	34	35	63	46	24	23	24	19	11	7	14	4	2	2
United States	1	2	2	1	5	1	1	2	5	0	3	2	7	1	1
ROW	7	12	11	7	5	0	2	0	3	1	1	0	1	0	0
Total	**111**	**190**	**179**	**204**	**215**	**115**	**117**	**139**	**172**	**167**	**158**	**224**	**393**	**277**	**277**

Table 24. Whey and Whey Product Imports ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	21	30	36	44	37	34	18	18	18	26	33	36	48	52	55
EU+UK	67	95	118	125	128	113	87	118	102	113	75	114	129	97	103
Argentina	10	14	20	19	26	17	8	11	12	17	16	16	22	32	18
Australia	8	14	16	17	14	8	11	14	15	10	16	19	21	16	11
ROW	2	6	8	8	8	10	8	6	6	6	11	13	13	10	15
Total	**107**	**159**	**199**	**213**	**213**	**182**	**133**	**168**	**153**	**172**	**151**	**199**	**234**	**207**	**203**

Table 25. Cheese and Curd Imports ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
New Zealand	32	41	50	52	52	51	56	71	70	56	51	56	60	60	60
United States	12	21	22	21	24	15	11	26	22	29	35	29	44	29	18
Australia	19	15	17	17	14	14	16	22	20	23	12	18	20	17	31
EU+UK	3	3	4	3	5	5	8	11	19	20	12	23	28	29	33
ROW	4	4	2	5	2	3	2	2	6	6	8	12	13	9	7
Total	**69**	**84**	**95**	**97**	**97**	**87**	**93**	**133**	**137**	**133**	**118**	**139**	**164**	**144**	**148**

II. Beef and Beef Products

Table 26. Frozen Bone in Meat Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Australia	5	8	2	5	26	11	21	28	31	41	39	63	60	53	60
New Zealand	3	4	0	2	11	3	4	7	6	5	7	7	6	7	4
United States	1	1	0	2	3	1	3	6	5	5	4	7	11	5	7
ROW	0	0	-	-	-	-	0	0	0	1	1	2	1	0	0
Total	**9**	**13**	**3**	**9**	**40**	**15**	**28**	**42**	**42**	**53**	**52**	**79**	**78**	**65**	**71**

Table 27. Tongues of Bovine Animals Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Australia	0	0	1	2	21	4	20	27	26	37	28	41	41	42	44
New Zealand	-	0	0	1	6	1	6	6	6	6	5	8	9	7	5
United States	-	-	-	1	0	-	1	1	-	-	0	-	0	0	2
ROW	-	-	0	-	0	0	0	0	1	2	1	2	2	2	1
Total	**0**	**0**	**1**	**4**	**27**	**5**	**27**	**34**	**33**	**45**	**35**	**52**	**52**	**50**	**52**

Table 28. Offal of Bovine Animals Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Australia	52	44	8	12	31	5	21	33	41	45	42	56	72	60	39
United States	12	16	1	4	11	-	12	20	15	28	19	31	21	17	6
New Zealand	31	21	4	4	11	4	7	10	12	11	8	11	11	8	4
ROW	1	0	0	0	0	-	0	2	1	3	2	4	7	4	1
Total	**96**	**82**	**13**	**20**	**53**	**9**	**41**	**65**	**69**	**87**	**72**	**102**	**112**	**89**	**49**

III. Processed Products

Table 29. Protein Concentrates Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	3	5	9	13	15	12	14	11	23	20	24	35	36	21	18
United States	1	2	5	2	3	2	2	6	9	8	9	14	14	15	14
Singapore	0	0	2	2	1	1	1	2	1	1	1	2	4	2	3
Thailand	0	0	0	0	0	0	0	0	0	1	1	1	1	1	2
Malaysia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
ROW	4	3	4	6	5	2	4	4	3	3	3	6	7	6	7
Total	**8**	**11**	**20**	**24**	**24**	**18**	**22**	**23**	**36**	**33**	**38**	**58**	**62**	**45**	**45**

Table 30. Dried Onions Imports by Origin $ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
India	0	0	0	0	0	0	0	0	0	1	1	9	16	6	14
China	0	0	0	0	0	0	1	2	2	2	4	4	8	8	11
Egypt	-	-	0	0	-	-	-	-	-	2	1	2	2	4	5
United States	10	11	11	12	11	12	13	13	13	13	11	11	6	2	2
ROW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	**10**	**11**	**12**	**12**	**12**	**12**	**14**	**15**	**16**	**18**	**17**	**26**	**32**	**19**	**33**

Table 31. Tomato Pasta Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	6	6	7	8	7	10	7	8	7	9	13	11	17	20	19
Italy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
United States	2	3	2	2	3	1	2	1	1	1	0	1	1	1	2
Switzerland	-	-	-	0	0	0	-	-	0	0	0	0	0	0	0
ROW	1	0	0	0	0	0	0	1	2	0	0	0	0	0	0
Total	**8**	**9**	**9**	**11**	**11**	**12**	**10**	**10**	**9**	**11**	**14**	**12**	**18**	**22**	**22**

Table 32. Starch Dextrin Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Thailand	65	70	76	66	59	52	53	60	74	72	74	81	106	85	97
China	9	9	9	7	4	4	5	5	6	5	7	11	23	19	23
United States	16	13	15	16	14	14	16	14	15	16	15	13	16	13	14
Netherlands	3	7	6	6	8	7	5	5	7	10	9	10	10	11	10
Vietnam	0	1	0	0	0	0	1	1	0	0	0	1	1	1	2
ROW	14	12	18	18	16	13	13	18	37	36	31	32	27	20	27
Total	**107**	**112**	**124**	**114**	**103**	**92**	**94**	**103**	**140**	**140**	**136**	**148**	**183**	**149**	**172**

Table 33. Wine Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
France	0	0	0	0	0	0	1	3	3	1	1	1	1	3	3
Australia	1	1	0	0	0	0	1	3	4	5	1	2	3	3	2
Italy	0	0	0	0	0	0	1	2	2	0	1	2	2	3	2
Chile	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
United States	0	0	0	0	0	0	0	1	1	1	0	1	1	1	1
ROW	1	1	0	0	0	0	1	2	4	2	1	1	2	3	3
Total	**2**	**2**	**1**	**1**	**1**	**1**	**4**	**11**	**15**	**11**	**4**	**7**	**10**	**14**	**12**

IV. Feed Ingredients

Table 34. Feed Prep, NESOI Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	179	234	154	183	210	183	212	231	41	28	25	30	27	31	40
Singapore	54	61	72	52	32	35	36	36	51	66	67	72	90	45	35
China	9	15	22	21	23	23	25	21	28	42	29	37	42	33	38
Thailand	2	4	5	5	6	8	7	8	9	15	13	20	17	20	25
South Korea	2	1	1	4	7	9	15	19	19	15	14	15	13	7	14
ROW	114	138	200	261	233	189	169	164	91	68	63	67	64	49	57
Total	**361**	**454**	**453**	**527**	**512**	**448**	**464**	**479**	**239**	**233**	**211**	**242**	**253**	**186**	**209**

V. Other intermediate

Table 35. Soybean oil Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Thailand	2	1	1	3	2	2	4	5	8	10	9	23	28	17	20
Malaysia	18	27	24	25	21	17	16	15	18	16	16	23	30	22	18
India	-	-	-	-	-	-	-	0	-	0	0	0	0	2	4
Australia	-	-	-	-	2	4	3	3	1	1	0	1	3	3	2
South Korea	0	0	0	0	0	0	0	0	0	0	0	1	1	0	1
ROW	1	2	7	7	3	2	1	2	5	6	7	5	3	2	1
Total	**22**	**30**	**33**	**35**	**29**	**25**	**24**	**26**	**32**	**33**	**33**	**53**	**64**	**47**	**46**

VI. Live Animals

Table 36. Day Old Chicks Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	-	-	-	-	-	-	10	22	26	26	24	25	32	35	33
New Zealand	-	-	-	-	-	2	1	1	1	1	4	3	1	5	3
France	-	-	-	-	-	1	-	-	3	2	2	4	2	3	2

Spain	-	-	-	-	-	-	-	-	-	-	-	1	1	1	1
ROW	0	0	0	0	0	0	1	1	2	2	1	0	0	0	0
Total	**0**	**0**	**0**	**0**	**0**	**3**	**12**	**24**	**31**	**31**	**32**	**33**	**36**	**44**	**39**

VII. Ag Related Products

Table 37. Salmon Imports by Origin ($ million)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Chile	-	-	0	0	-	1	0	1	1	1	7	9	9
United States	-	0	0	0	0	1	-	0	1	0	1	2	4
Japan	1	2	1	0	2	1	1	1	1	2	1	1	1
South Korea	-	-	-	-	-	-	-	-	-	0	-	-	-
ROW	3	2	0	0	2	2	1	2	1	1	1	0	-
Total	**4**	**5**	**2**	**1**	**4**	**5**	**2**	**3**	**3**	**4**	**9**	**13**	**13**

Table 38. Flat Fish Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	-	-	-	-	-	-	0	0	-	0	1	1	1	3	8
Vietnam	0	0	-	-	-	-	-	-	-	-	-	-	-	-	-
Canada	-	-	-	-	-	-	-	-	-	-	-	-	0	-	-
China	0	0	-	-	-	-	-	-	-	-	-	-	-	-	-
ROW	1	2	0	-	0	0	0	0	-	-	0	-	0	-	0
Total	**1**	**2**	**0**	**-**	**0**	**0**	**0**	**0**	**-**	**0**	**1**	**1**	**1**	**3**	**8**

Table 39. Venner Imports by Origin ($ million)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	12	21	15	14	14	15	10	11	18	21	33	51	46	51	70
United States	4	4	8	8	7	9	12	11	11	9	8	11	10	9	10
Vietnam	0	0	1	3	0	0	0	0	1	1	2	4	4	3	7
Singapore	1	0	0	0	0	0	0	0	0	0	0	0	0	3	1
South Korea	0	0	0	1	1	1	1	1	2	1	2	2	1	1	2
ROW	7	8	12	11	10	8	6	8	8	12	9	14	16	11	8
Total	**24**	**34**	**36**	**37**	**32**	**33**	**29**	**31**	**40**	**44**	**53**	**82**	**77**	**78**	**98**

ANNEX 3: Indonesia Trade Agreements

No	Agreements	Partners	Note
1	IJEPA	Indonesia, Japan	Implemented: 2008
2	ATIGA	ASEAN members	Implemented: 2010
3	AIFTA	ASEAN, India	Implemented: 2010
4	PTA-G8	Indonesia, Bangladesh, Iran, Malaysia, Egypt, Nigeria, Pakistan, and Turkey	Ratified: 2011
5	AANZFTA	ASEAN, Australia, New Zealand	Implemented: 2012
6	IPPTA	Indonesia, Pakistan	Implemented: 2013
7	AKFTA	ASEAN, Korea	Implemented: 2018
8	AJCEP	ASEAN, Japan	Implemented: 2018
9	IPTFCP	Indonesia, Palestine	Implemented: 2019
10	ACFTA	ASEAN, China	Implemented: 2019
11	ICCEPA	Indonesia, Chile	Implemented: 2019
12	AHKFTA	ASEAN, Hong Kong	Implemented: 2020
13	IACEPA	Indonesia, Australia	Implemented: 2020
14	IECEPA	Indonesia, EFTA (Iceland, Liechtenstein, Norway, and Switzerland).	Implemented: 2021
15	IMPTA	Indonesia, Mozambique	Implemented: 2022
16	IUEACEPA	Indonesia, Uni Emirate Arab	Implemented: 2023
17	IKCEPA	Indonesia, Korea	Implemented: 2023
18	IIPTA	Indonesia, Iran	Signed 2023, ratification process
19	ICCEPA	Indonesia, Canada	Concluded negotiation: 2024
20	IEU CEPA	Indonesia, EU	Negotiation to conclude in H1 2025
21	IP-CEPA	Indonesia, Peru	Negotiation began in 2024
22	IEAEU PTA	Indonesia, Russia, Kyrgyzstan, Kazakhstan, Armenia and Belarus (EAEU)	Final round of negotiation: 2024
23	IT PTA	Indonesia, Tunisia	Negotiation launched in in 2018, latest discussion in 2022

Source: MOT

Attachments:

No Attachments.