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SENADA
INDONESIA COMPETITIVENESS PROGRAM

INDUSTRY VALUE CHAIN REVIEW

AUTOMOTIVE COMPONENTS, FURNITURE AND GARMENTS

FEBRUARY 2007 – STTA RICHARD CURREY

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DISCLAIMER

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AUTOMOTIVE COMPONENT INDUSTRY VALUE CHAIN (IVC) REVIEW:

Operational Mechanisms and the Inter-Relationships of Firms in the Automotive Component IVC

February 16, 2007

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This report serves as an extension to SENADA's *Indonesia's Competitive Environment* study which was published in March 2006.

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RESEARCH AND METHODOLOGY

In order to attain a greater insight into the footwear, furniture, garment and automotive component industry value chains (IVC), SENADA commissioned a team to conduct research in and around Jakarta, Surabaya, Bandung, and Semarang for 6 weeks. Information was collected from multiple sources, including through interviews with suppliers, manufacturers, distributors, retailers, associations and donor organizations, as well through secondary research via the Internet (*see Appendix 1: IVCS interview list*). Specifically, this project had 3 objectives:

- Mapping the value chains, from input suppliers to end-consumers, including the principal characteristics of the firms and organizations that drive the value chains;
- Gaining insight into the mechanisms and the interrelationship of these firms throughout each step of the value chains
- Gaining an understanding of the value in monetary terms attributable to firms along the value chains

This report provides an overview of each industry and a detailed analysis of material/product movement throughout each IVC. Based on our findings, SENADA will map previously identified constraints to gauge where along the IVC our assistance will be most effective.

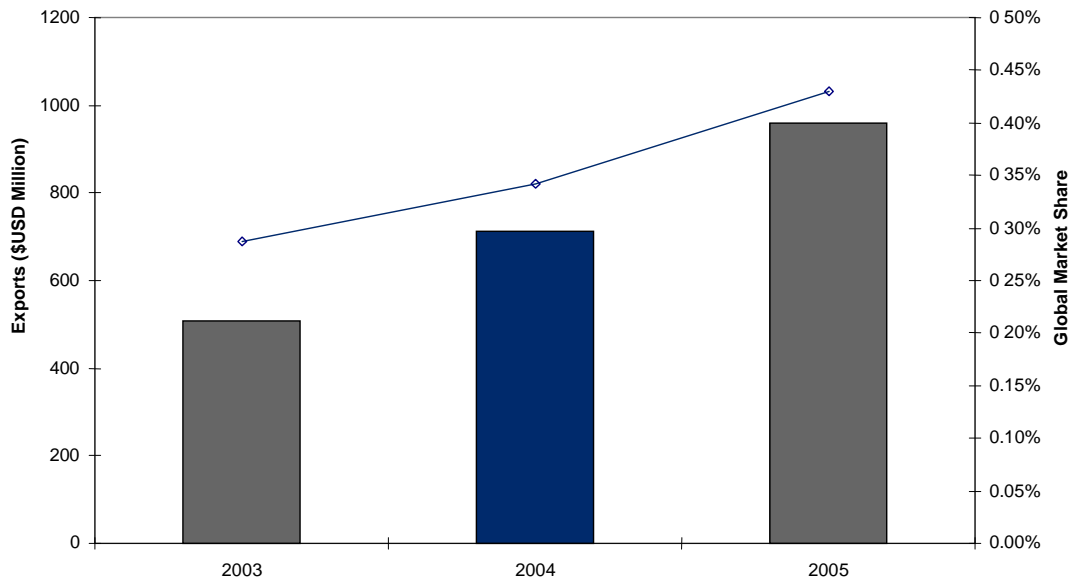
AUTOMOTIVE COMPONENTS INDUSTRY VALUE CHAIN

Overview of the Indonesian Automotive Components Industry

The Indonesian automotive components industry is extremely diverse and encompasses a wide array of products. For example, GIAMM, the Indonesian automotive parts and components association (*see Appendix 2: GIAMM Member List*) has 136 members that produce 22 categories of automotive component, ranging from shock absorbers to brake systems to wiring harnesses.

As shown in the graph below, Indonesian automotive component exports grew 40% from 2003 to 2004, and 35% from 2004 to 2005. In 2005, the total value of automotive components was over USD \$960 million, which equates to a 90% increase in global market share for Indonesia from 2003 to 2005.

FIGURE 1: INDONESIAN AUTOMOTIVE COMPONENT EXPORTS AND GLOBAL MARKET SHARE



The largest export destinations for Indonesia between 2003 and 2005 were Japan and other Southeast Asian countries, notably, Malaysia, Thailand and Singapore, as illustrated below. There has been a tremendous increase in exports to Malaysia, whereas exports have decreased to both Singapore and the Philippines.

TABLE 1: INDONESIAN AUTOMOTIVE COMPONENT EXPORTS BY COUNTRY

Country	2003	2004	2005	% Change (2004-2005)
Japan	\$100,145,291	\$131,454,085	\$194,553,803	48%
Malaysia	\$54,203,517	\$76,053,045	\$185,658,150	144%
Thailand	\$65,283,587	\$94,234,487	\$123,552,325	31%
Singapore	\$77,375,644	\$93,203,195	\$75,732,147	-19%
Philippines	\$63,971,583	\$48,050,507	\$47,088,095	-2%
US	\$42,381,338	\$48,021,749	\$51,756,015	8%
UK	\$9,046,423	\$65,259,995	\$79,987,124	23%
Vietnam	\$15,696,179	\$23,421,403	\$31,036,822	33%

As noted above, there are numerous types of units comprising this IVC. From Table 2, it will be seen that there has been tremendous growth in gearbox exports, which increased from just over USD \$1 million in 2003 to USD \$131 million in 2005. Additionally, exports of both body accessories and bumpers have grown significantly over the same period. Of the selected components, only drive axles posted a decrease.

TABLE 2: INDONESIAN EXPORTS BY AUTOMOTIVE COMPONENT

Component	United States Dollars			% Change
	2003	2004	2005	2005/2004
Bumpers	\$4,124,877	\$8,709,860	\$13,525,519	55%
Body Accessories	\$4,756,506	\$15,309,844	\$23,694,082	55%
Mufflers	\$253,622	\$1,634,554	\$2,315,519	42%
Gearboxes	\$1,000,200	\$98,617,308	\$131,921,894	34%
Wheel Rims and Spokes	\$2,473,040	\$2,452,435	\$2,819,379	15%
Steering Wheels and Columns	\$10,593,530	\$12,216,360	\$13,574,318	11%
Drive Axles	\$10,604,178	\$9,792,564	\$9,424,380	-4%

With regard to the domestic market, no national data was available, despite the conducting of online research and holding of meetings with GIAMM and other government-related trade organizations. Accordingly, this report does not include an analysis of automotive-component production destined for the domestic market.

Automotive Components: Domestic and Export IVC Product Flow

To gain a more thorough understanding of the operational mechanisms and interrelationships of firms in the automotive component IVC, SENADA mapped the movement of materials and product, from input supplier to end consumer, for both the domestic and export markets (*see Appendix 3: Automotive Component Value Chain Overview*).

Automotive Components: Input Suppliers

Automotive-component production involves a multitude of inputs, including steel and steel alloys of various gauges, aluminum, brass, copper, resins for molding, rubber and rubber compounds, and various densities and compositions of foam and paper products for filters. Basic materials are purchased both locally and from foreign suppliers, notably from Japan, Korea, Taiwan and China, depending upon the automotive component in question.

Differences in the quality of inputs are primarily concerned with whether the part being produced is for an original-equipment manufacturer (OEM), which refers to a company that acquires a product or component and reuses or incorporates it in a new product bearing its own brand name; or whether it is intended to be sold as an unbranded product.

In the case of components intended for the OEM market, nearly all raw-material inputs are purchased by a limited number of authorized automotive assembly firms (e.g., PT Astra, Honda Prospect Motors, etc.), which are commonly referred to as first-tier suppliers. These firms are joint ventures, primarily with Japanese and Korean automobile companies, such as Toyota, Honda, Mitsubishi, Suzuki, Hyundai and Kia. Sufficient raw materials are purchased to cover

component production and are supplied directly by the assembly firm to the producers of the components, which are referred to as second-tier suppliers. As necessary, these raw materials are further distributed to third-tier suppliers, which are typically small-scale tool and die makers. Due to the stringent production requirements set by the actual automobile manufacturers, several domestically produced input products do not meet quality standards and are therefore imported. For those input products that are purchased domestically, “net-30” terms are applied, meaning that the entire balance of payment from the first-tier supplier must be made within 30 days to the raw material manufacturer.

For the domestic market, unbranded automotive components generally use a much higher percentage of locally produced raw materials to minimize costs. The sourcing and purchase of raw materials is done by the actual automotive-component manufacturer (second- and third-tier suppliers), and is also often conducted on a “net 30” basis. However, depending upon the nature of the relationship, payment terms are sometimes cash only.

Automotive Components: Production

The automotive components that are produced domestically are intended for the following purposes:

- Incorporation into newly produced automobiles
- Domestic wholesale/retail sale as an OEM automotive component
- Domestic aftermarket wholesale/retail sale as an unbranded automotive component

For OEM-certified components, production commences following an order placed by one of the global automobile producers (e.g., Toyota, Honda, etc.), with a first-tier supplier (e.g., PT Astra). As noted in the previous section, there are only a limited number of joint-venture companies in Indonesia that assemble domestically produced automotive components into actual finished automobiles. This is due both to high entry costs (e.g., equipment, technology), as well as the quality standards required to be certified as a first-tier supplier (e.g., ISO-9000/140000 certification, regular auditing by representatives of the foreign automobile manufacturer). Upon receipt of a production order, the first-tier supplier segments the request into specific modules. For example, the assembly of a brake system requires the production of many individual components, including, but not limited to, brake pads, brake linings and discs. After identifying the individual components that have to be produced, the first-tier supplier then outsources actual production to second-tier suppliers by providing them with detailed component specifications. Most second-tier suppliers are specialized in particular areas of manufacturing, and are therefore unable to produce all the parts necessary to manufacture an automobile. Consequently, first-tier suppliers typically outsource to several second-tier suppliers at the same time to maximize product accuracy and time efficiency.

As noted earlier, second-tier suppliers are provided with the raw materials necessary to create the automotive component they have been contracted to produce. Production of automotive components is heavily focused on equipment utilization, particularly the use of dies or molds. Most second-tier suppliers do not create their own dies or molds, and instead outsource this work to third-tier suppliers. A die or mold is created using steel or hard plastic, and is formed to the

exact specifications of the automotive component to be produced by the second-tier supplier. As a result, they can be used repeatedly and only need to be replaced after prolonged usage.

Due to the wide array of product types, it is not possible to give a “one-size-fits-all” description of automotive-component production in Indonesia. However, taking the production of an oil filter as an example, the process encompasses stamping, cutting, welding, finishing and assembly. Steel parts are hand-welded, brazed with brass filament or soldered, depending on the application. The initial stock coming into the receiving area of the second-tier supplier is acid-cleaned to remove any surface rust. The stock has a thin oil coating, but this is insufficient to protect the coils from deteriorating due to climatic conditions and humidity. An acid bath, known as etching, removes surface rust. This prepares the surface for spray painting or, in more modern plants, powder coating.

The next operation is stamping or forging, which presses the end materials into the proper shape and diameter, including the “lip” that facilitates the attachment of the side stock. Manual milling processes and screw-cutting are performed on the bar stock that connects to the engine oil pipe. Gaskets are generally hand-fitted to the parts that require sealing and prevent oil leakage after installation in the engine.

Urethane foam and filter paper is pre-cut to the proper size for manual installation before the final end is soldered to the side material. The finished filter is initially packed into individual component boxes, then into 24-piece master cartons.

Although production methods mirror those in OEM, there is a major difference in the quality of raw materials used as the costs of unbranded components are often 50-60% less than those that are branded. Consequently, there is significant pressure on second-tier suppliers to minimize the cost of goods sold.

Automotive Components: Distribution

Once a second-tier supplier has completed an OEM production order, they deliver the goods via truck (either their own or rented), to the facility of the first-tier supplier (e.g., PT Astra’s). In doing so, the second-tier supplier must bear the costs of delivery. Once received, the representative of the first-tier supplier (e.g., warehouse/inventory manager), inspects the delivery to ensure it is in compliance with the agreed specifications. Assuming the delivery meets established quality standards, the OEM automotive components will be used in the assembly of automobiles (e.g., installing the OEM oil filters into Toyota Kijangs being assembled by the first-tier supplier), or be sold on either the domestic or export aftermarket (e.g., automotive components sold as repair or replacement parts).

If used in the assembly of automobiles, the parts are initially stored in the first-tier supplier’s warehouse and are transferred as needed to the assembly line for production. For domestic sale, OEM components are purchased by a certified wholesaler under “net-30” terms and then resold to retail and, less often, repair shops in major markets (e.g., Jakarta, Surabaya, Bandung).

For the export market, automotive components are packed in branded boxes. An empty container from a freight-forwarding company is delivered to the first-tier supplier’s facility and loaded with

the finished goods. After being loaded, the container is driven to the shipping port (e.g., Tanjung Priok), where it is unloaded and placed on a commercial vessel.

The container is offloaded at the destination port where, after clearing customs, the goods are loaded onto a truck and shipped to the buyer's warehouse for eventual delivery to their retail outlets. The cost of delivery within the final destination country varies with either the freight-forwarding company or buyer covering the costs. In the OEM production scenario, payment terms are typically "net-30" for all players involved.

Unbranded automotive components are almost predominantly for the domestic aftermarket. Similar to OEM distribution, there are wholesalers which purchase unbranded components for further resale to the same retail outlets and repair shops. Typical retail outlets are small-scale operations that are housed together in a large shopping center where goods are sold to both individual consumers and repair shops on a cash basis. The pressing difference between retail outlets is whether they are authorized dealers of specific brands (e.g., Toyota, Honda, Suzuki), or independent outlets that sell both branded and unbranded components.

Repair shops are typically small. However, they offer the customer the opportunity to have the component replaced at their facilities for a fee. Often, these shops are located on the side of the road, and generally stock unbranded automotive components sourced from retail shops.

Automotive Components: Product-Cost Breakdown

To gain a more comprehensive understanding of the respective costs and gross margins during each stage of the overall automotive-components IVC, we analyzed the specific IVC for an oil filter sold on the domestic market.

Product Costs	Price (USD)	Percentage of Total Retail Cost
RAW MATERIALS		
Paper	\$0.34	
Steel Case Sides	\$0.40	
Steel Case Ends	\$0.45	
Foam	\$0.05	
Rubber Gaskets	\$0.14	
Raw Material Supplier's Mark-Up	\$0.36	
TOTAL RAW MATERIALS COST	\$1.74	30%
PRICE TO MANUFACTURER	\$1.74	
MANUFACTURING		
Freight to Manufacturer	\$0.05	
Labor	\$0.50	
Indirect Materials	\$0.14	
Packaging	\$0.05	
Overheads	\$0.45	
Manufacturer's Mark-Up	\$0.41	
TOTAL MANUFACTURING COST	\$1.60	28%
PRICE TO WHOLESALER	\$3.34	
WHOLESALE		
Freight to Warehouse	\$0.11	
Storage Costs	\$0.12	
Wholesaler's Mark-Up	\$0.90	
TOTAL WHOLESALE COST	\$1.13	19%
PRICE TO RETAILER	\$4.47	
Freight to Retailer (Repair Garage)	\$0.11	
Retailer's Mark-Up	\$1.20	
TOTAL RETAIL COST	\$1.31	23%
RETAIL PRICE	\$5.78	100%

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Suara Merdeka; Konveksi Pekalongan terancam bangkrut, February 24, 2003

APPENDIX 1: INTERVIEW CONTACT LIST

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
APRISINDO	Footwear	Indonesian Footwear Association	Singgih Witarso	Jl. Tanah Abang III No. 18; Jakarta 10160	(21) 3447575
PT Sumber Kreasi Fumiko	Footwear	Footwear Distributor	Yongki Komaladi	Jl. Sentani Raya Blok M No. 29; Kemayoran Jakarta Pusat 10720	(21) 6402277
ASMINDO	Furniture	Indonesia Furniture Industry and Handicraft Association	Sae Tanangga Karim	Jl. Pegambiran No. 5a 3rd floor Rawamangun; Jakarta 13220	(21) 47864028
Reksa Group	Automotive Components	Autoparts Distributor	Moh. Aminduddin	Jl. Raya Graha Kembangan Asri K-8; Gresik Jawa Timur	(31) 3952550
PT Arta Glory Buana	Garments/ Textiles	Garment Producer	Dr. Willy Josep C.	Jl. Raya Gelam 40; Candi-Sidoarjo 61271	(31) 8961508
Mikronika International	Automotive Components	Tool and Die Manufacturer	Heri Prasetyo Budi	Jl. Ngingas Selatan No. 14a; Waru-Sidoarjo	(31) 8534171
International Finance Corporation (IFC)-PENSA	Furniture	Sustainable Wood Program	Moray McLeish	Jl. Raya Puputan No. 488; Renon Denpasar 80226	(361) 265350
GIAMM	Automotive Components	Indonesian Autoparts Association	Hadi Surjadipradja	Jl Kelapa Hybrida Raya Blok QH XII No.2 Kelapa Gading	(21) 4515587
GAPPEPSI	Footwear	Footwear Distributor	R. Tutang Mochtar	Jl Wanajaya No.22 Blk 6b Rt.002/003 Pasirjaya Kota Bogor Barat 16119	(251) 632759
PT Hangah Palah Sejahtera	Footwear	Footwear Producer	Goi Hui Hwa (Wawan)	Jl Sultan Agung Pasar Rumpug No.2-4 Jakarta	(21) 83703689
PT Intrapenta Jaya Sakti	Footwear	Footwear Distributor (trading company)	Albert Tansil	Komp. Cita Graha Jl Panjang No.26 Blok 2L Kedoya	(21) 5819089
PD Bangun Tridharma	Footwear	Footwear Producer	Marga Singgih	Komp Gunung Sahari Permai Blok E No.5 Jl Gunung Sahari No.60	(21) 4208525
API (Asosiasi Pertekstilan Indonesia)	Garments/ Textiles	Indonesia Textile Association	Ernovian G. Ismy	Adhigraha Lt.16 Jl Gatot Subroto 56 Jakarta	(21) 5272171

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
PT Braja Mukti Cakra	Automotive Components	Autoparts Producer	Santoso Wardoyo	Jl Desa Harapan Kita No.4 Harapan Jaya Bekasi Utara 17124	(21) 8871836
PT Dharma Elektrindo Manufacturing	Automotive Components	Autoparts Producer	Gagat Prijawan	Jl Jababeka III H Blok C 17W Cikarang Industrial Estate I Bekasi	(21) 89832677
PT Gelora Salix Prima	Furniture	Furniture Producer	Sudjono Kosasih	Jl Raya Serang KM; Tangerang 15610	(21) 5950385
GAIKINDO	Automotive Components	Indonesian Automobile Manufacturer's Association	Nogar Jito	Jl Cokroaminoto 6; Jakarta Pusat	(21) 3157178
PT Dhaya Tuhumitra	Footwear	Footwear Producer	Max Loekito	Jl Cibolerang 120; Bandung 40224	(22) 5402660
Procio	Footwear	Footwear Producer	Hikmat	Pasar Gambir Kemayoran; Blok D-1 Apt. 9 Jakarta Pusat 10620	(251) 632759
Ministry of Industry	N/A	Government Ministry	Djumarman	Jl Jend. Gatot Subroto Kav. 52-53 Lt. 19 Jakarta 12950	(21) 5251132
APKI (Asosiasi Penyamak Kulit Indonesia)	Footwear	Tanning Association	Agit Yuwono	Jl Jembatan Dua No. 14, Jakarta 14450	(021) 669-3629/ 0816725986
PT Daraya Multi Nine	Garments	Garment Buying Agent for Local Hypermarket	Susi Suraya	Jl Kemang Raya No. 83H	(021) 718-0443
PT Indofacing Indonesia	Automotive Components	Component Manufacturer	Iwan Pradjinata	Jl Raya Banjar Sugihan No.7, Surabaya, East Java	(031) 740-5548
PT FSCM Manufacturing Indonesia	Automotive Components	Component Manufacturer	Harjanto	Jl. Bypass Krian Km. 26 No.8, Surabaya, East Java	(031) 897-2425
Central Java Indonesian Trade & Investment Center	Furniture	Furniture Trader/Broker	Dewi Artati	Jl. Java Design Centre, 2nd floor, Jl Imam bonjol 154-160, Semarang 50139	(024) 358-3577
Muslihin	Furniture	Furniture Manufacturer	Muslichin	Kawasan Industri Candi, Jl. Gatot Subroto Blok 23/9, Semarang	(024) 7626864
Masyarakat Industri Kehutanan-Jawa Tengah	Furniture	Forestry Industry Community	HM Wiradadi	Gedung Java Design Center LtII Jl. Imam Bonjol 156-160, Central Java	(024) 3521241

APPENDIX 2: GIAMM MEMBER LIST

Company Name	Domestic TO 2005	Export TO 2005	Production Items
PT. 3M Indonesia	US\$ 4,469,141.43	US\$ 114,565.77	Tapes & Film
PT. Abadi Barindo Autotech	Rp 616,500,000,000	Rp 162,900,000,000	Car Seat, Seat Adjuster, Car Interior, Seat Component Part, Interior Material
PT. Aisin Indonesia	Rp 722,275,000,000	Rp 112,725,000,000	Clutch Cover, Clutch Disc, Window Regulator, Door Lock, Frame, Door Handle, Intake Manifold, Strike, Hood Lock
PT. Andhi Chandra Automotive Product Tbk	Rp 57,461,106,474	Rp 160,512,611,028	Automotive Filters, (Air Filter, Fuel Filter, Oil Filter)
PT. Arai Rubber Seal Indonesia	Rp 101,000,000,000	Rp 59,000,000,000	Oil Seal, O-Ring & Rubber Part
PT. Armada Indah Agung Glass	N/A	N/A	Safety Glass for Automobile and Architecture
PT. Asahimas Flat Glass Tbk	Rp 362,698,000,000	Rp 65,178,000,000	Automotive Safety Glass
PT. Astra Daihatsu Motor	Rp 6,033,920,000,000	Rp 91,686,000,000	Vehicle Unit, Engine Assy, Transmission Assy, Press Parts, Casting Part
PT. Astra Honda Motor	N/A	N/A	Motorcycle
PT. Astra Otoparts Divisi Adiwira Plastik	N/A	N/A	Mirror, View, Mirror, Plastic, Component, Air, Cleaner Assy, Metal Component, Production Support, Equipment, Seat Bottom Assy, Head Lamp
PT. Astra Otoparts Tbk	Rp 3,101,660,000,000	Rp 751,337,000,000	Automotive & Motorcycle Spare Part
PT. AT Indonesia	Rp 391,6 Billion	Rp 61,3 billion	Drum Brake, Caliper & Support, Pressure Plate, Fly Wheel, Retainer, Intermediate, Bracket, Cyl. Casting, Exhaust Manifold, Casting & Metal Foaming
PT. Ateja Multi Industri	Rp 71,400,000,000	Rp 51,700,000,000	Seat Fabric
PT. Autoliv Indonesia	Rp 55,020,000,000	Rp 700,000,000	Safety Belt for Automotive
PT. Bakrie Tosanjaya	N/A	N/A	Brake Drum, Flywheel, Disc Brake, Manifold, Pressure Plate, Hub, Differential Case, Bracket, Wheel Spider, Clutch Housing, Gearbox, Transmission Case etc
PT. Bando Indonesia	N/A	N/A	V-Belt and Conveyor Belt
PT. Bangun Sarana Alloy	N/A	N/A	Aluminum Alloy Wheel Rim
PT. Baninusa Indonesia	N/A	N/A	Piston Ring & Camshaft
PT. Braja Mukti Cakra	N/A	N/A	Brake Drum, Flywheel, Disc Brake Hub, Pressure Plate, Pulley
PT. Buanatama Metalindo	N/A	N/A	Filter (Air, Oil, Fuel)
PT. Central Karya Megah Utama	N/A	N/A	Radiator
PT. Centuries Batteries Indonesia	Rp 124,441,289,466	Rp 187,616,584,722	Battery for Automotive
PT. Chemco Harapan Nusantara	N/A	N/A	Brake System, Aluminum Casting
PT. Chuhatsu Indonesia	N/A	N/A	Leaf/Coil Spring, Stabilizer
PT. Cipta Kreasi Prima Muda	Rp 25,000,000,000	Rp 3,500,000,000	Rear View Mirror, Auto Lamp, Grille

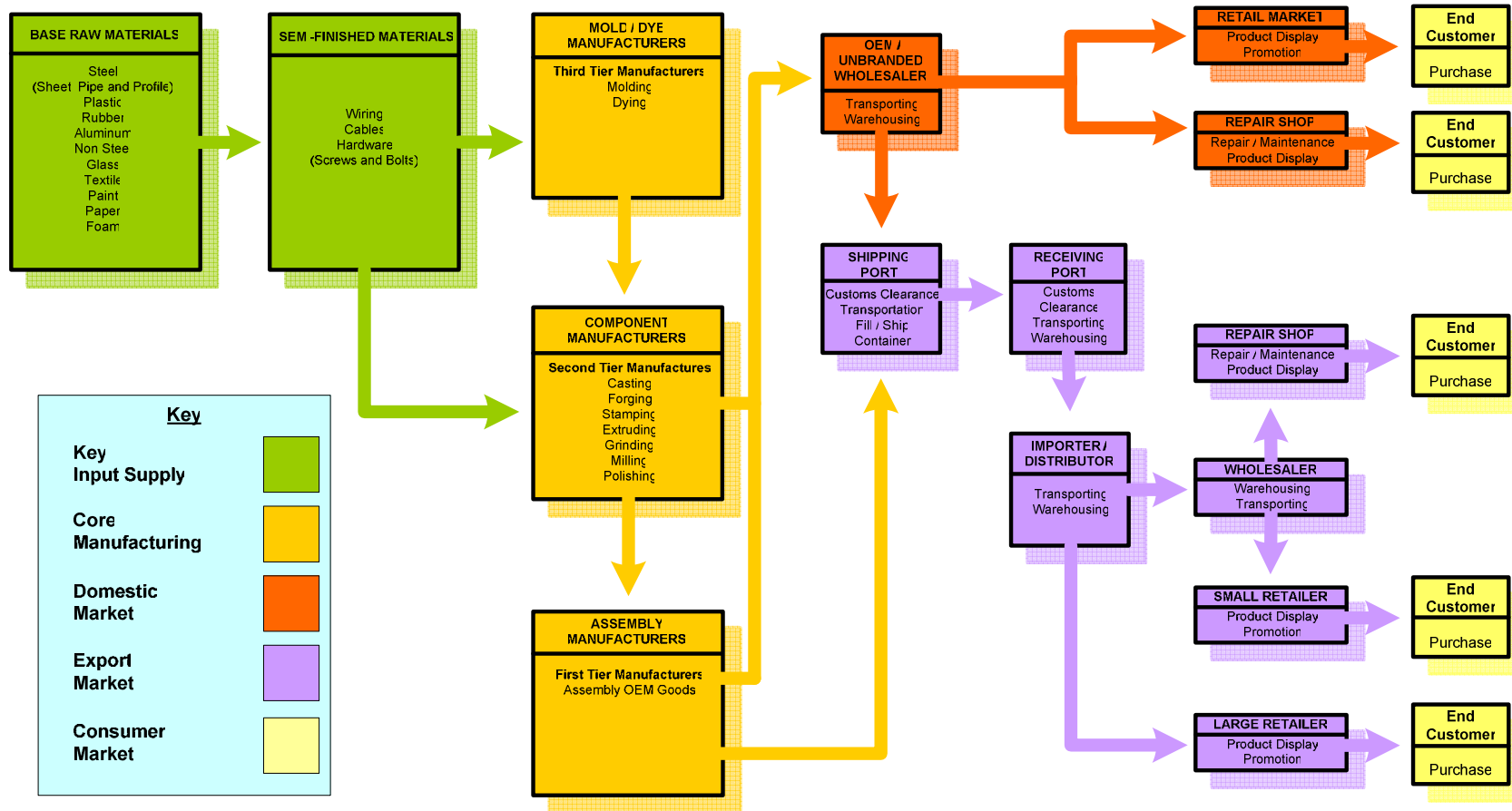
Company Name	Domestic TO 2005	Export TO 2005	Production Items
PT. Cipta Mandiri Wirasakti	Rp 60,000,000,000	N/A	Wiring Harness, Battery Cable & Others Cable Assy
PT. Cipta Saksama Indonesia	Rp 80,000,000,000	N/A	Mufflers, Exhaust Pipes
PT. Danmotor Indonesia	N/A	N/A	PIAGIO
PT. Dasa Windu Agung	N/A	N/A	Plastic & Polyurethane Cars Component
PT. Delphi Automotive Systems Indonesia	N/A	US\$ 11,574,000	Wiring Harness
PT. Denso Indonesia	US\$ 305,169,700	US\$ 87,229,000	Car (A/C), Compressor for Car A/C, Radiator, Windshield Washer, Radiator Reservoir, Sparkplug, Air Filter, Fuel Filter, Idle Speed Control Valve, Stick Coil, Oxygen Sensor
PT. Dharma Controlcable Indonesia	N/A	N/A	Control Cable
PT. Dharma Electrindo Manufacturing	Rp 7,000,000,000	N/A	Wiring Harness & Parting Sensor
PT. Dharma Precision Parts	Rp 33,500,000,000	N/A	Machining & Sub Assy Component
PT. Dharma Polimetal	Rp 460,000,000,000	Rp 135,000,000,000	Motorcycle & Automotive Component, Powder Coating, Wet Painting, Ni Chrome Plating, Acid Zinc Plating
PT. Duta Nichirindo Pratama	N/A	N/A	Filter, Press Parts
PT. Edico Utama	N/A	N/A	Piston
PT. EDS Manufacturing Indonesia	US\$ 45,500,000	US\$ 56,500,000	Automotive Wiring Harness
PT. Eka Swastya	N/A	N/A	Brake Shoes, Brake Pad, Brake Lining for Motorcycle
PT. Ekamitra Jayatama	Rp 11,690,634,888	Rp 862,853,681	Automotive Lamps, Plastic Injection Component, Press Part (Door Lock), Luggage, Paddle Lock
PT. Excel Metal Industry	N/A	N/A	Alloy Wheel
PT. Exedy Indonesia	Rp 193,289,745,000	Rp 22,278,118,177	Clutch Disc, Clutch Cover, Carrier and Housing Clutch, Clutch Assy
PT. Federal Izumi Manufacturing	Rp 162,700,000,000	Rp 5,000,000,000	Automotive Engine Piston
PT. Federal Nittan Industries	Rp 175,296,974,315	Rp 14,031,120,493	Engine Valve
PT. Frina Lestari Nusantara	Rp 60,666,255,930	Rp 164,879,523	Foot Step, Cover Spare Wheel, Side Body Moulding, Front Bumper Guard, Rear Upper Spoiler, Weather Guard, Rear Bumper Guard, Mud Guard
PT. FSCM Manufacturing Indonesia	Rp 270,000,000,000	Rp 2,000,000,000	FSCM, RIR, FEDERAL CHAIN
PT. Fuji Technica Indonesia	Rp 64,686,285,742	Rp 15,834,140,036	Dies, Stamping Part, Jig & Fixture, Sub Assy
PT. Garuda Metal Utama	N/A	N/A	U-Spring U-Bolt, Shackle Pin, Spring Shackle Assy, Spare Tire Carrier
PT. Garuda Metalindo	N/A	N/A	EAGLE
PT. Gemala Kempa Daya	Rp 242,511,000,000	N/A	Frame Chasis & Pressed Parts
PT. General Motors Indonesia	N/A	N/A	Vehicle, Steering, Engine
PT. GS Battery	Rp 469,321,000,000	Rp 145,595,000,000	Battery for Automotive & Motorcycle
PT. Hamaden Indonesia Mfg	N/A	N/A	Horn

Company Name	Domestic TO 2005	Export TO 2005	Production Items
PT. Hankook Casting Indonesia	Rp 15,045,299,302	Rp 14,256,272,526	Pivot Holder, Duct Air, Cover Generator, Cover Crank Case, Housing Clutch, Bracket, Hub Rear (Automotive Parts)
PT. Hi-lex Indonesia	N/A	N/A	Mechanical Control Cable
PT. Hilex Parts Company	N/A	N/A	Spare Part Control Cable Parts
PT. Honda Prospect Motor	Rp 5,374,085,336,800	Rp 125,432,175,732	Car Assembly Engine Parts
PT. HRL International	N/A	N/A	Oil Filter, Air Filter, Fuel Filter, Brake Shoe, Product Rubber, Hoses
PT. Hydraxle Perkasa	N/A	N/A	Dump Hoist, Trailer Axles, Dump Truck
PT. Ichikoh Indonesia	Rp 291,000,000,000	Rp 9,000,000,000	Automotive Lamp and Mirror
PT. Indobaja Primamurni	N/A	N/A	Spring Steel Flat Bar (Leaf Spring Material)
PT. Indo VDO Instruments	Rp 89,640,518,650	US\$ 8,406.27	Automotive Instrument
PT. Indokarlo Perkasa	Rp 118,176,871,319	Rp 89,640,518,650	Rubber Parts
PT. Indonesia Nippon Seiki	Rp 757,000,000,000	US\$ 41,000	Electrical Parts of two wheels & four wheels vehicle
PT. Indoniles Electric Parts	Rp 30,423,000,000	Rp 13,958,000,000	Flasher, Relay, Door Lock, Combination Switch, Power Window Switch
PT. Indonesia Stanley Electric	Rp 635,366,937,065	Rp 2,057,402,437	Manufacturing of Automotive Lighting Equipment, Manufacturing of Mold and Die
PT. Indoprima Gemilang	N/A	N/A	Wiring Harness, Battery Cable, Brake Lining, Roll Lining, Brake Shoe & Disc Pad For Motorcycle, Combination Switch, Ignition Switch
PT. Indosafety Sentosa Industry	Rp 177,000,000,000	Rp 4,000,000,000	Window Regulator, Reclining Seat, Sliding Seat
PT. Indospring Tbk	N/A	N/A	Leaf Spring, Hot Coil, Cold Coil
PT. Inkoasku	N/A	N/A	Steel Wheel Rim Category I and IV (passenger)
PT. Indofacing Indonesia	Rp 12,163,586,090	Rp 13,744,339,901	Clutch Facing
PT. Inti Ganda Perdana	Rp 944,959,000,000	N/A	Rear Axles & Propeller Shafts
PT. Inti Pantja Press Industri	N/A	N/A	Press Body Component for Vehicle
PT. Inti Polymetal	N/A	N/A	Sub Assembly Parts, Deep Draw Parts, Fuel Tank, Oil Pan
PT. Ionuda	N/A	N/A	Shock Absorber, Muffler
PT. IRC Inoac Indonesia	Rp 811,072,000,000	Rp 60,383,000,000	Rubber Part, Polyurethane & Automotive Plastic Parts
PT. Jakarta Marten Logamindo	N/A	N/A	Heat Treatment Service
PT. Jibuhin Bakrie Indonesia	Rp 110,000,000,000	Rp 65,000,000,000	Ring Gear, Rocker Arm, Yoke, Tie Rod
PT. Jideco Indonesia	US\$ 3,068,618.9	US\$ 12,093,890.4	Wiper Motor Assy, Case Assy Gear, Yoke Assy, Link Assy, Motor complete, Washer System, Yoke Assy Power Window, Relay Assy Starter, Starter Motor Assy
PT. Karya Bahana Berlian	N/A	N/A	Seat Assy/ Automotive Seat
PT. Kawasaki Motor Indonesia	N/A	N/A	Motorcycle, Spare Part for 2 Wheels
P. Kayaba Indonesia	Rp 1,005,000,000,000	Rp 13,000,000,000	Shock Absorber, Front Fork, Oil Cushion Unit, Stay Damper, Chair Damper

Company Name	Domestic TO 2005	Export TO 2005	Production Items
PT. Kotobukiya Indo Classic Industries	Rp 37,075,833,104	Rp 5,939,978,798	Floor Mat
PT. Kyoda Mas Mulia	Rp 15,000,000,000	N/A	Body Component, Socket Body, Sub Arm Reflector for Motorcycle, Washer for Automotive
PT. Lippo Melco Auto Parts	Rp 163,500,000,000	Rp 17,100,000,000	Starter, Alternator for Automotive
PT. Mastrotto Indonesia	US\$ 3,000,000	US\$ 22,000,000	Cover Seat (Automotive Leather)
PT. Meiwa Indonesia	Rp 420,093,000,000	N/A	Interior Parts, Seat Assy Auto Mobile (Head Lining Door Trim, Floor Mat, Visor Assy, Seat Assy) & Motor Cycle
PT. Mekar Armada Jaya	N/A	N/A	Pressed Parts Components
PT. Menara Terus Makmur	Rp 276,000,000,000	N/A	Mechanical Jacks, Hand Tools (Tool Set For OEM Car), Forged Parts, After Market Parts
PT. Meshindo Alloy Wheel Corp	N/A	N/A	Alloy Wheel
PT. Metindo Era Sakti	Rp 265,000,000,000	N/A	Stamping, Dies, Jigs & Machining Parts For Automotive & Motorcycle
PT. Mitsuba Indonesia	Rp 750,000,000,000	Rp 73,000,000,000	AC Generator, Horn, Relay, Starter Motor (Electrical Part Automotive)
PT. Mitsubishi Krama Yudha Motor & Mfg	Rp 964,000,000,000	Rp 32,000,000,000	Engine Assembly, Engine Machining & Stamping
PT. MK Prima Indonesia	Rp 15,162,120,500	US\$ 6,348,917.49	Brake Shoes, Brake Pad, Mould & Dies
PT. Morita Tjokro Gearindo	Rp 207,000,000,000	Rp 2,380,000,000	Gear, Shaft, Automotive Component
PT. Muarateweh Spring	N/A	N/A	Leaf Spring
PT. Multi Prima Sejahtera Tbk	Rp 23,600,000,000	Rp 1,900,000,000	Spark Plug
PT. Musashi Auto Parts Indonesia	N/A	N/A	Transmission Gear & Cam Shaft
PT. NGK Busi Indonesia	N/A	N/A	Spark Plug (Metal Shell Forging for Spark Plug)
PT. NHK Gasket Indonesia	Rp 82,186,000,000	Rp 12,236,000,000	Cylinder Head Gasket for Automotive/ Motorcycle; Raw Material Gasket
PT. Nichias Leakless Telison Gasket Mfg	Rp 119,443,121,132	Rp 22,283,449,763	Automotive Gasket
PT. Nichias Rockwool Indonesia	Rp 47,500,000,000	Rp 29,500,000,000	NA Gasket Joint Sheet, Exhaust Pipe Seal, Steel Asbestos, Thermal Insulation Rockwool, Spiral Wound Gasket, Tap Out Cone, Lumisul, etc
PT. Nihon Plast Indonesia	Rp 14,670,000,000	Rp 71,700,000,000	Steering Wheel
PT. Nikko Cahaya Electric	N/A	N/A	Starter, Alternator, Parts
PT. Nipress Tbk	N/A	N/A	Battery for Automotive & Motorcycle
PT. Pakarti Riken Indonesia	Rp 350,129,000,000	Rp 88,969,000,000	Spare Part Casting Iron for Automotive 2-Wheel & 4-Wheel
PT. Pakoakuina	N/A	N/A	Aluminum Alloy Wheel
PT. Palingda Nasional	N/A	N/A	Steel Wheel Rim Category II and II (Truck and Bus)I
PT. Pamindo Tiga T	Rp 208,172,032,000	N/A	Steel Fabrication, Machineries, Hydraulic Lifting Equipment, Press Dies Fuel Tank, Mufflers, Part of Cabin, Part Rear Body, Part of Construction Equipment

Company Name	Domestic TO 2005	Export TO 2005	Production Items
PT. Panata Jaya Mandiri	N/A	N/A	Filter Filtration Systems
PT. Partuni Perdana	N/A	N/A	Gasket
PT. Pong Codan Indonesia	US\$ 131,427	US\$ 635,478.47	Rubber Parts
PT. Sanoh Indonesia	Rp 90,801,750,000	Rp 1,000,000,000	Brake and Fuel Tube
PT. Selamat Sempurna Tbk	Rp 82,440,000,000	Rp 375,560,000,000	Filter, Radiator, Brake Pipe, Fuel Tanks, Muffler, Packing
PT. Showa Indonesia Manufacturing	Rp 1,250,352,891,204	Rp 83,787,616,074	Shock Absorber, Power Steering
PT. SKF Indonesia	Rp 322,500,000,000	Rp 316,000,000	Deep Groove Ball bearing
PT. Subur Djaja Teguh	Rp 109,507,748,424	N/A	Automotive Spare Parts; Press; Machining/Stamping
PT. Sugity Creative	Rp 719,830,000,000	Rp 303,600,000	Carosseri, Cabin, Injection & Extrusion, Plastic Chrome Plating
PT. Sumi Indo Wiring Systems	US\$ 26,655,000	US\$ 15,731,000	Wiring Harness for Automotive
PT. Sungwoo Indonesia	N/A	N/A	Safety Belt
PT. Three Star Indonesia	Rp 1,091,718,660	US\$ 1,799,577.95	Radiator, Condenser
PT. Toyota Motor Manufacturing Indonesia	N/A	N/A	Motor Vehicle (Kijang Innova, Avanza & Dyna), Engine (Gasoline, Diesel), CKD-Vehicle Component, Component Engine Parts, (Crankshaft, Cylinder Block, Crankcap, Flywheel, Piston)
PT. Toyo Denso Indonesia	N/A	N/A	Switch, Coil (Motorcycle Parts)
PT. Tri Dharma Wisesa	Rp 282,911,288,910	Rp 89,596,472,376	Brake Systems
PT. Tri Mega Baterindo	Rp 7,454,370,418	Rp 27,190,002,540	Battery for Automotive
PT. Trimitra Baterai Prakarsa	N/A	N/A	Automotive Battery
PT. Usra Tampi Indonesia	N/A	N/A	Plastic Part
PT. Wahana Eka Paramitra	Rp 55,553,000,000	N/A	Transmissions & Gear Boxes
PT. Waja Kamajaya Sentosa	N/A	N/A	Rear Axle Shaft, Brake Pipe, Strut Bar, King Pin, Spring Pin, Spring Bracket, Spring Shackle
PT. Wijaya Karya In-Trade	N/A	N/A	Automotive Parts-Inlet Manifold, Engine Cover, Timing Gear Case, Water Outlet Pipe Upper Bracket, Under Bracket, Outer Tube, Cylinder Tank (Aluminum Casting), Engine Cover, Steering Cowl, Dust Cover, Bosh Centre Plastic
PT. Yamaha Indonesia Motor Mfg	N/A	N/A	Motorcycle
PT. Yamatogomu Indonesia	Rp 20,400,000,000	Rp 64,597,535,000	Rubber Parts
PT. Yuasa Battery Indonesia	US\$ 33,989,100	US\$ 19,775,700	Battery for Automotive and Motorcycle
PT. Yudistira Utama Indonesia	N/A	N/A	Pressed Metal Part for Automotive Vehicle, Engines Electrical Equipment, House Appliance, Press Dies
PT. Yutaka Manufacturing Indonesia	Rp 380,081,822,207	N/A	Disc Brake, Muffler for Motorcycle

APPENDIX 3: AUTOMOTIVE COMPONENTS VALUE CHAIN OVERVIEW





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FURNITURE INDUSTRY VALUE CHAIN (IVC) REVIEW:

Operational Mechanisms and the Inter-Relationships of Firms in the Furniture IVC

February 16, 2007

This publication was produced for review by the United States Agency for International Development. It was prepared by Development Alternatives, Inc.

FURNITURE INDUSTRY VALUE CHAIN (IVC) REVIEW:

Operational Mechanisms and the Inter-Relationships of Firms in the Furniture IVC

DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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This report serves as an extension to SENADA's *Indonesia's Competitive Environment* study which was published in March 2006.

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RESEARCH AND METHODOLOGY

In order to attain more insight into the footwear, furniture, garment and automotive component industry value chains (IVC), SENADA commissioned a team to conduct research in and around Jakarta, Surabaya, Bandung, and Semarang for 6 weeks. Information was collected from multiple sources and included interviews with suppliers, manufacturers, distributors, retailers, associations and donor organizations, as well as secondary research via the Internet (*see Appendix 1: IVCS interview list*). Specifically, this project had 3 objectives:

- Map the value chains, from input suppliers to end consumers, including the principal characteristics of the firms and organizations that drive the value chain;
- Describe the mechanisms and the inter-relationship of these firms throughout each step of the IVC
- Provide a breakdown of costs and profit margins for representative products within each IVC

This report provides an overview of each industry and a detailed analysis of material/product movement throughout each IVC. Based on our findings, SENADA will map previously identified constraints to gauge where along the IVC our assistance will be most effective.

FURNITURE INDUSTRY VALUE CHAIN

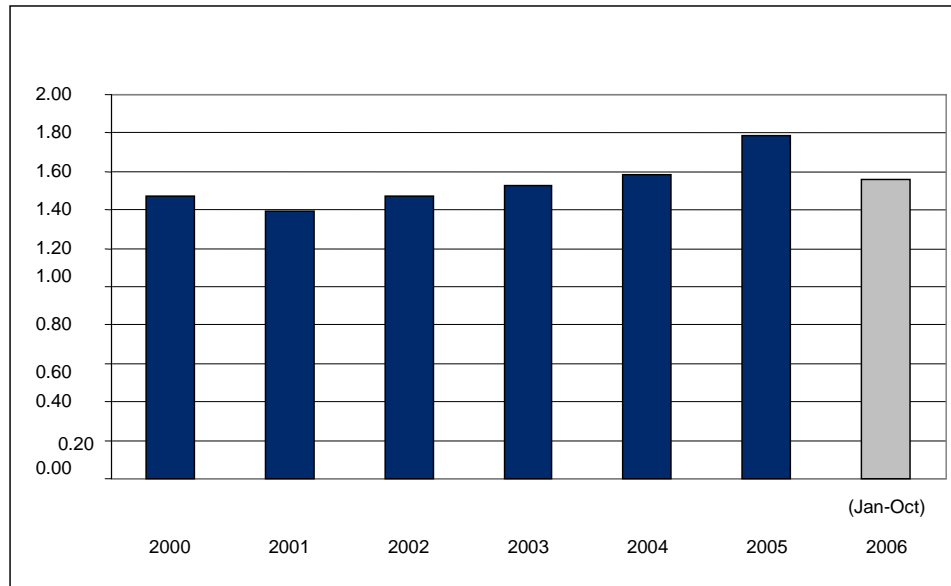
Overview of the Indonesian Furniture Industry

The Indonesian furniture industry is comprised of wooden (rubberwood, mahogany, teak, acacia), rattan and metallic/plastic products for both export and domestic consumption. While most larger firms focus on mixed panel and solid wood, the small to medium producers focus on solid wood furniture. This is due to the high capital investment necessary to produce overlaid panel furniture. For the small to medium sized producer, the cost of purchased panels as material remains high, as the market price for these products is reflected in the domestic and export demand for plywood, particleboard and MDF.¹

¹ IFC-Pensa Sawn Timber Market Study

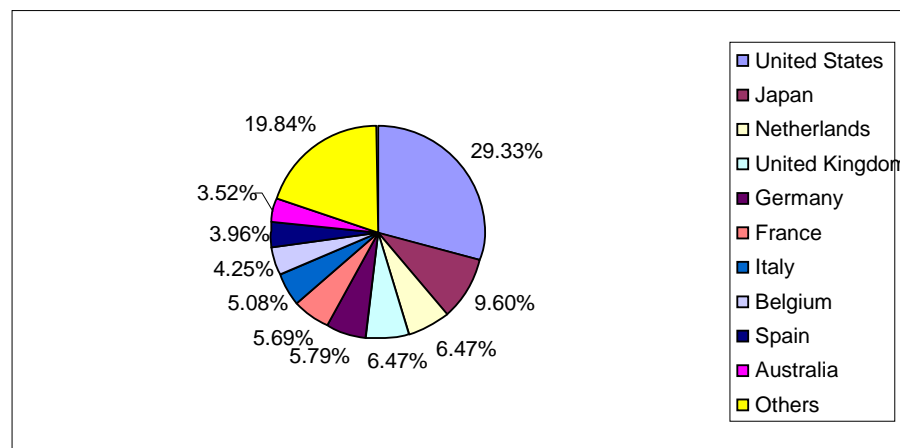
From 2000-2005 the export of Indonesian furniture has increased 17%, totaling USD \$1.78 billion in 2005².

TABLE 1: EXPORT FURNITURE SALES FROM INDONESIA (2000-2006) in US Dollars



Wood furniture accounts for 75% of exports, while rattan and metallic/plastic furniture comprises the rest at 20% and 5% respectively. The largest furniture export market for Indonesia is the United States (29.3%), followed by Japan (9.6%), the Netherlands and United Kingdom (6.47% each)³.

FIGURE 1: EXPORT DESTINATION COUNTRIES FOR INDONESIAN FURNITURE (2005)



Indonesia has held its market share more or less constant over the past 3 years at around 2.5%, despite a substantial increase in the market share held by China.

² ASMINDO; Indonesian Furniture Directory 2007

³ ASMINDO; Indonesian Furniture Directory 2007

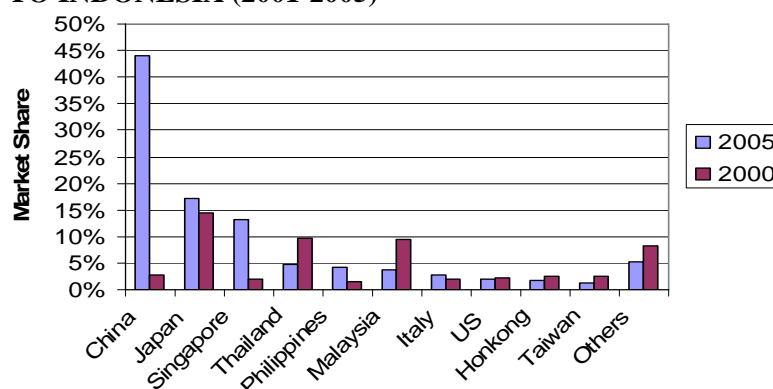
TABLE 2: SHARES OF GLOBAL EXPORT MARKET FOR FURNITURE (HS 9403)

COUNTRY	2003	2004	2005
China	11.65%	13.31%	16.07%
Malaysia	3.07%	3.06%	2.91%
Indonesia	2.53%	2.35%	2.55%
Taiwan	2.15%	1.88%	1.69%
Thailand	1.57%	1.53%	1.47%
Hong Kong	1.79%	1.17%	0.73%
India	0.25%	0.39%	0.46%
Philippine	0.54%	0.49%	0.45%

Source : Global Trade Atlas

In regard to the domestic market, there was no national data available for use. However, ASMINDO, the Indonesian furniture association (*see Appendix 2: ASMINDO Member List*), estimates domestic sales to be approximately 25% of exports, totaling USD \$450 million. Most domestic furniture is of traditional design and can be categorized as bedroom (30%), living room (30%), kitchen (20%) and case goods such as bookcases, cabinets and dressers (20%). These items are typically produced in small workshops and are sold either directly to consumers or via intermediaries for larger orders. The ease in sourcing small quantities of wood and other materials, low investment costs for machinery (less than USD \$1,000 in most cases) and the availability of unskilled but trainable labor are all main drivers of the small scale producer/seller model.

One significant trend in the domestic market has been an increase in imported furniture, particularly through the advent of hyper-markets and super-stores that source directly from large-scale importers or foreign manufacturers. Imports have increased from USD \$8.5 million in 2000 to USD \$35 million in 2005. China is the major participant, now supplying over 40% of legally imported furniture to Indonesia, followed by Japan (17%) and Singapore (13%)⁴.

FIGURE 2: COUNTRIES EXPORTING FURNITURE TO INDONESIA (2001-2005)

Furniture: Domestic and Export IVC Product Flow

To gain a more thorough understanding of the operational mechanisms and interrelationships of firms in the furniture IVC, SENADA mapped the movement of materials and product,

⁴ ASMINDO; Overview on Indonesia Furniture and Handicraft Industry 2006

from input supplier to end consumer, for both the domestic and export markets (*see Appendix 3: Furniture Value Chain Overview*).

Furniture: Input Suppliers

Wood for furniture production is sourced from either forests or plantations. Although plantation timber is most commonly used for pulp and paper production, increasing quantities are being used for furniture production. Historically, large-scale manufacturers source wood from forests, since they require substantial volume and have the funds necessary to cover licenses, permits and fees, while smaller-scale manufacturers must rely on input from plantations.

Wood used in traditional domestic production is transported to Java from other islands, such as Sumatra, Kalimantan and Sulawesi and include meranti, nyatoh, bintangor, balam, and bangkerai species. Teak is the only traditional material grown on plantations, but since the reformation era and the implementation of regional autonomy, huge tracts of this valuable timber have disappeared making it too expensive for most domestic market applications. Export production uses both traditional species as well as other domestic and import sourced types such as rubberwood, acacia, albasia and radiata pine (from New Zealand plantations).

Most plantations operate in the same fashion. Seedlings are developed from seed propagation, tissue culture or grafting operations. Several trans-plantings are necessary during the formative years of the saplings. Some plantation species develop very quickly, such as albasia, where wood can be cut and processed in five years time to traditional plantation species such as teak and mahogany that may take up to 50 years to reach cutting size.

The determining factors in tree harvesting are the fertility of the soil, proper mix of fertilizers, pest/fungus control spraying and weather conditions. The plantation is laid-out to allow for small trucks to pass the grid and take the trees that meet harvesting requirements. Clear cutting is not normally used in plantations because trees develop at different rates and economical cutting requires selection of those trees that meet the minimum diameter requirements.

Once cut, logs are manually debarked and cut in a band-saw mill. Sawmills are typically located near the source of the logs to minimize the cost of transporting. According to the CIFOR study on Rural Livelihoods, there are between 2,300 and 3,500 small scale sawmill units in operation at this time in Indonesia.⁵

Once logs are cut into boards at the sawmill, they are stacked and delivered via truck to the furniture manufacturer's receiving area. Payment terms are typically cash to the contractors who cut and transport the timber. Other materials, from panels to glue, finishing materials, hardware, packing and indirect materials are made locally or in overseas factories and purchased from vendors who normally work on net 30 payment, meaning the entire balance of payment required must be made within 30 days to the raw material supplier.

Furniture: Production

Once boards are received by the furniture manufacturer, they are then placed into an autoclave vacuum chamber. A diluted mixture of Borax (for anti-fungal activity combating blue stain) and Borix (an insecticide) is injected into the vacuum chamber and penetrates all

⁵ CIFOR Study on Rural Livelihoods 2004

the fibers of the wood under treatment. The boards are then removed and placed directly into the kiln for drying.

The drying process involves steady circulating hot, dry air to the kiln chamber. Hydraulic movement draws out the deeply held moisture in the boards. Many kilns are now computer controlled to monitor conditions in the chamber. The kiln is monitored periodically and moisture content is checked on several boards. The wood is removed once the moisture content is below 10%.

The kiln-dried sawn timber is cut and milled in a planer or moulder. The moulding operation cuts on six sides in the same run, resulting in dressed timber that is of precise dimension and ready for further processing.

The next processing step is to finger-joint short cut pieces of wood to make longer boards. The zig-zag cut of the finger-jointed board maximizes the surface area of the glued wood. If done properly, a finger joint is stronger than the natural wood that surrounds it. These elongated boards are joined in large clamping presses then further machined to eliminate any surface roughness or differences in the thickness or width of the board throughout its length.

Once the components are milled, shaped and turned, they are finished in a multi-step process that involves several initial coats of sanding sealer. This eliminates the uneven surface and pores in the wood, leaving a smooth surface for the final finish. The individual components are finished as either separate components in a knock-down system or as an entire unit through assembly using nails and screws.

Several repeat steps are required in finishing. First, a sanding sealer is applied in one or two coats. This is a lacquer based material that is quick and upon drying allows efficient sanding. Following this, a painting conveyor facilitates spraying and air-drying operations. Usually a linear oven is part of the assembly line and accelerates the drying process. Once dried, components are removed and packed for shipment using polyethylene foam sheets and five ply outer cartons.

Furniture: Distribution

Upon completion of a production order, the furniture manufacturer must arrange for delivery of the goods to the buyer. For domestic distribution, box trucks, owned and operated by the furniture manufacturer, are loaded by direct employees and “day laborers” (people hired on a daily basis). Once loaded, the trucks are driven directly to a large retailer’s warehouse (e.g., Carrefour, Giant) or a furniture wholesaler’s facility for unloading and temporary storage by a team of its’ own employees.

Smaller quantities of furniture are delivered from the wholesaler and large retailers’ warehouses to retail shops using their own fleet of trucks. Once goods arrive at the retail location, they are unloaded and displayed for sale to the end consumer. Sales to domestic retailers require the furniture manufacturer accepts up to 60 days (net 60) to receive payment.

Export distribution is generally executed through a letter of credit (L/C) which is a document issued by a bank that essentially acts as an irrevocable guarantee of payment to a beneficiary. The export process begins after a representative from the purchasing company (e.g., Pier One, IKEA) inspects a sample of goods to be shipped. If approved, the furniture manufacturer contacts a freight forwarding company (e.g., PT Maersk, PT Forin Antarbuana Flyindo, PT Schenker Petrolog Utama) to arrange the schedule and all necessary documentation for shipping.

Upon agreement, the empty container from the freight forwarding company is delivered to the manufacturer's facility and loaded with finished goods. After being loaded, the truck is driven to the shipping port (e.g., Tanjung Priok) where it is unloaded and placed onto a commercial shipping vessel. This is generally the point where the buyer accepts responsibility for the shipment, in an arrangement known as free-on-board (FOB).

The shipment of goods via sea takes 4-5 weeks to arrive at the receiving port (e.g., Europe, USA) and is unloaded at the dock. After clearing customs, the goods are loaded into a truck and shipped to the buyers' warehouse for eventual delivery to their retail outlets. The cost of shipment within the final destination country varies with either the freight forwarding company or buyer covering the costs.

Furniture: Product Cost Breakdown

To understand more about the specifics of the furniture IVC, we chose to analyze the costs and mechanisms of exporting a rubberwood-composite kitchen table and 4 chairs.

Product Costs	Price (USD)	Percentage of Total Retail Cost
RAW MATERIALS		
Rubberwood Logs	\$38.46	
Plantation Mark-Up	\$5.77	
Freight to Sawmill	\$3.30	
Cutting/Milling	\$25.00	
Sawmill Mark-Up	\$23.48	
TOTAL RAW MATERIALS COST	\$96.01	12%
PRICE TO MANUFACTURER	\$96.01	
MANUFACTURING		
Freight to Manufacturer	\$15.11	
Painting	\$20.00	
Hardware	\$10.00	
Packaging	\$10.00	
Labor	\$44.17	
Overhead	\$43.54	
Manufacturer's Mark-Up	\$42.54	
TOTAL MANUFACTURING COST	\$185.36	24%
PRICE TO WHOLESALE	\$281.37	
WHOLESALE		
Freight to Importer	\$120.00	
Importer's Mark-Up	\$122.00	
TOTAL WHOLESALE COST	\$242.00	31%
PRICE TO RETAILER	\$523.37	
Freight to Retailer	\$13.75	
Retailer's Mark-Up	\$250.00	
TOTAL RETAIL COST	\$263.75	33%
RETAIL PRICE	\$787.12	100%

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APPENDIX 1: INTERVIEW CONTACT LIST

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
APRISINDO	Footwear	Indonesian Footwear Association	Singgih Witarso	Jl. Tanah Abang III No. 18; Jakarta 10160	(21) 3447575
PT Sumber Kreasi Fumiko	Footwear	Footwear Distributor	Yongki Komaladi	Jl. Sentani Raya Blok M No. 29; Kemayoran Jakarta Pusat 10720	(21) 6402277
ASMINDO	Furniture	Indonesia Furniture Industry and Handicraft Association	Sae Tanangga Karim	Jl. Pegambiran No. 5a 3rd floor Rawamangun; Jakarta 13220	(21) 47864028
Reksa Group	Automotive Components	Autoparts Distributor	Moh. Aminduddin	Jl. Raya Graha Kembangan Asri K-8; Gresik Jawa Timur	(31) 3952550
PT Arta Glory Buana	Garments/ Textiles	Garment Producer	Dr. Willy Josep C.	Jl. Raya Gelam 40; Candi-Sidoarjo 61271	(31) 8961508
Mikronika International	Automotive Components	Tool and Die Manufacturer	Heri Prasetyo Budi	Jl. Ngingas Selatan No. 14a; Waru-Sidoarjo	(31) 8534171
International Finance Corporation (IFC)-PENSA	Furniture	Sustainable Wood Program	Moray McLeish	Jl. Raya Puputan No. 488; Renon Denpasar 80226	(361) 265350
GIAMM	Automotive Components	Indonesian Autoparts Association	Hadi Surjadipradja	Jl Kelapa Hybrida Raya Blok QH XII No.2 Kelapa Gading	(21) 4515587
GAPPEPSI	Footwear	Footwear Distributor	R. Tutang Mochtar	Jl Wanajaya No.22 Blk 6b Rt.002/003 Pasirjaya Kota Bogor Barat 16119	(251) 632759
PT Hangah Palah Sejahtera	Footwear	Footwear Producer	Goi Hui Hwa (Wawan)	Jl Sultan Agung Pasar Rumpug No.2-4 Jakarta	(21) 83703689
PT Intrapenta Jaya Sakti	Footwear	Footwear Distributor (trading company)	Albert Tansil	Komp. Cita Graha Jl Panjang No.26 Blok 2L Kedoya	(21) 5819089
PD Bangun Tridharma	Footwear	Footwear Producer	Marga Singgih	Komp Gunung Sahari Permai Blok E No.5 Jl Gunung Sahari No.60	(21) 4208525
API (Asosiasi Pertekstilan Indonesia)	Garments/ Textiles	Indonesia Textile Association	Ernovian G. Ismy	Adhigraha Lt.16 Jl Gatot Subroto 56 Jakarta	(21) 5272171
PT Braja Mukti Cakra	Automotive Components	Autoparts Producer	Santoso Wardoyo	Jl Desa Harapan Kita No.4 Harapan Jaya Bekasi Utara 17124	(21) 8871836

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
PT Dharma Elektrindo Manufacturing	Automotive Components	Autoparts Producer	Gagat Prijawan	Jl Jababeka III H Blok C 17W Cikarang Industrial Estate I Bekasi	(21) 89832677
PT Gelora Salix Prima	Furniture	Furniture Producer	Sudjono Kosasih	Jl Raya Serang KM; Tangerang 15610	(21) 5950385
GAIKINDO	Automotive Components	Indonesian Automobile Manufacturer's Association	Nogar Jito	Jl Cokroaminoto 6; Jakarta Pusat	(21) 3157178
PT Dhaya Tuhumitra	Footwear	Footwear Producer	Max Loekito	Jl Cibolerang 120; Bandung 40224	(22) 5402660
Procio	Footwear	Footwear Producer	Hikmat	Pasar Gambir Kemayoran; Blok D-1 Apt. 9 Jakarta Pusat 10620	(251) 632759
Ministry of Industry	N/A	Government Ministry	Djumarmarman	Jl Jend. Gatot Subroto Kav. 52-53 Lt. 19 Jakarta 12950	(21) 5251132
APKI (Asosiasi Penyamak Kulit Indonesia)	Footwear	Tanning Association	Agit Yuwono	Jl Jembatan Dua No. 14, Jakarta 14450	(021) 669-3629/ 0816725986
PT Daraya Multi Nine	Garments	Garment Buying Agent for Local Hypermarket	Susi Suraya	Jl Kemang Raya No. 83H	(021) 718-0443
PT Indofacing Indonesia	Automotive Components	Component Manufacturer	Iwan Pradjinata	Jl Raya Banjar Sugihan No.7, Surabaya, East Java	(031) 740-5548
PT FSCM Manufacturing Indonesia	Automotive Components	Component Manufacturer	Harjanto	Jl. Bypass Krian Km. 26 No.8, Surabaya, East Java	(031) 897-2425
Central Java Indonesian Trade & Investment Center	Furniture	Furniture Trader/Broker	Dewi Artati	Jl. Java Design Centre, 2nd floor, Jl Imam bonjol 154-160, Semarang 50139	(024) 358-3577
Muslihin	Furniture	Furniture Manufacturer	Muslichin	Kawasan Industri Candi, Jl. Gatot Subroto Blok 23/9, Semarang	(024) 7626864
Masyarakat Industri Kehutanan-Jawa Tengah	Furniture	Forestry Industry Community	HM Wiradadi	Gedung Java Design Center LtII Jl. Imam Bonjol 156-160, Central Java	(024) 3521241

APPENDIX 2: ASMINDO MEMBER LIST

Company Name	Production Items	Export Production	Main Market
Absormatic Indonesia, PT	Humidity Absorber	50,000 unit	Vietnam, Europe, Malaysia
Absortech Indonesia, PT	Bag of Humid Water Absorber	N/A	Asia Pacific
Acglass, CV	Indoor Furniture	10 Containers	Europe & USA
Agung Putra Mandiri, CV	Rattan, Wooden Furniture	15-30 containers	Europe, USA, Australia, Africa
Alam Calamus, PT/ Brand "CHAMDANI"	Aluminum Outdoor, Rattan.Loom, Wooden Solid & Veneer Furniture	20 containers	Germany, Italy, The Netherlands, Switzerland, Belgium, UK, USA, Japan
Ambarjati Furniture	Furniture & Handicraft	10 Containers	Europe , Asia, Africa
Anjana Furniture	Furniture Leather, Wooden	10 Containers	Europe, Middle East, USA
Anna Craft, CV	Handicraft & Furniture	3 containers	Europe
Antique Jaga Furniture, CV	Antique Replica Furniture	3-4 containers	Belgium, Russia, UK
Antipodes	Furniture	10-12 containers	France, Spain, Italy, Greece, etc
Anugrah Ceramic	N/A	N/A	N/A
AP Cargo (PT. Anugrah Prima Prananda)	Freight Forwarding	40 containers	Europe, Asia, Australia
Apiko Rotanindo, C.	Rattan Furniture	5-10 containers	UK, Greece, Sweden, Belgium
Apikri	Handicraft	4 containers	USA, Canada, Australia, Spain, Netherlands, France, Japan
Arjuna Jati Furniture	Furniture	15 x 40 ft containers	Europe, USA
Artanis Pratama Jaya, PT	Teak Garden Furniture (Machine Made)	10 Containers	USA, Turkey, Jordan, UK, Italy, Etc
Aulia Yasmin	Indoor Furniture	4 x 40" containers	USA, Spain, Netherlands
Axioma	Teak Furniture	10 Containers 40 ft	Europe & Australia
Bale	Furniture & Handicraft	6 containers	Europe, Spain
Bamboo Batavia, PT	Bamboo Furniture	100 cub	Europe
Filippo Wood Furniture	Indoor Furniture	6-10 containers	Europe, Asia, Australia, America
Belladonna Primaraya, PT	Rattan Wicker Furniture	50 containers	Europe, USA & Canada, South America, Middle East
Bellagio Furnishing	Indoor	10 containers	USA, Europe, France, Iran
Benefindo Prima Putera, CV	Furniture	4 containers	Europe, Australia
Beta Foam Industrial, CV	Sofa Bed, Folding Bed	15-20 containers	Japan, Singapore, Spain, South Africa, Turkey
Bohdeline	Outdoor Furniture	10 containers	Europe
Borobudur Furniture	Indoor Furniture	6 containers	France, Italy, Japan, Australia
Buana Cahya Abadi	Rattan Furniture	30 containers	Europe, USA, Australia, Japan
Bymart Asia, PT	Handicraft	13-15 containers	Philippines, USA, Africa, Mexico, The Netherlands
Cakra Buana Jaya, CV	Rattan Furniture	20 containers	Italy, Denmark, Germany
Cambium	Indoor Furniture	15 containers 40 std/hc	Europe, Middle East, Australia
Casa Jaya Furniture, PT	Garden Furniture	5-10 containers	Europe, USA, UK, Dubai & Turkey
Cassini Collection, CV	Rattan Furniture-Living set	20 x 40 ft	Middle East, Europe, USA, Australia
Caveman Artistika Nusantara, PT	Rustic & Modern Furniture	5 containers	USA, Europe, Middle East
Cipta Karya Gemilang, CV	Furniture	20 x 40" containers	Europe, Asia
Credo Trophis Gallery, CV	Furniture Art & Handicraft	40" containers	Europe, USA, Asia
Danar Pratama, CV	Rattan Furniture	10 x 40 ft containers	Finland, Germany

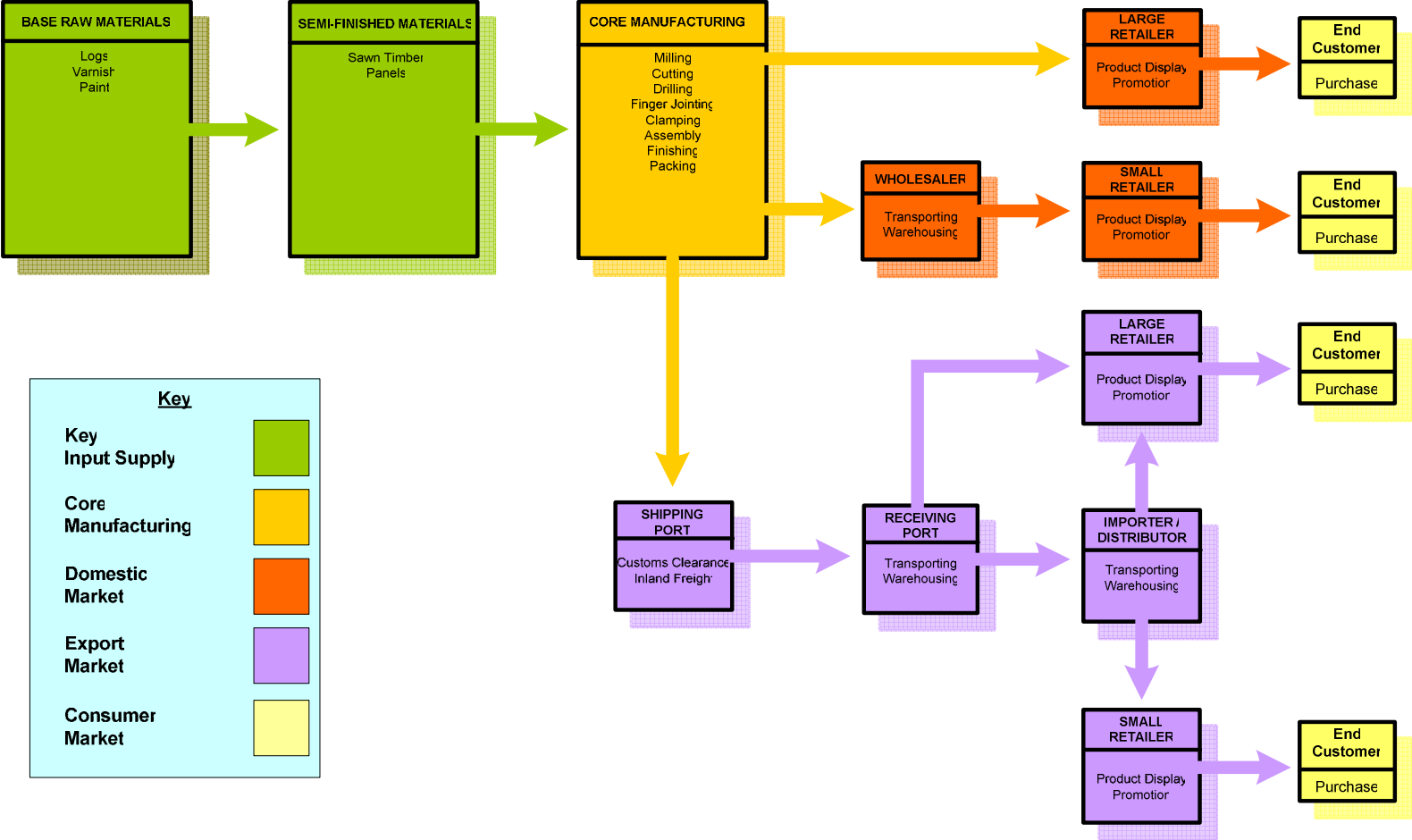
Company Name	Production Items	Export Production	Main Market
De Bough Indonesia, CV/ Dahlia, PT	Anyaman Bahan Alam/ Furniture	5 - 10 containers	USA, Europe
Dea Furniture	Cabinet, Table	4 containers	Europe
Delima Inti Raya, PT (PT Dira)	Rattan Furniture	30 - 40 containers	Europe, Australia
Delta Furniture, PT	Outdoor & Indoor Furniture	20 containers	Europe
Dimo Putera Jaya, CV	Rattan, Wooden Furniture	25 containers	Europe, USA, Japan & Australia
Dinas Pelayanan Koperasi & UKM Jawa Tengah	Furniture	N/A	N/A
Dinas PERINDAG Kab Lombok Barat	Furniture	N/A	Europe
Dinas PERINDAG Prov. Bali			
Oliqus Homeware	Furniture and Mirror Frame, Inlay or Mosaic Coconut Shell, Cinnamon, Coco Wood	20 ft	Europe,
The Rattan Shop	Rattan Furniture, Lighting	1-2 containers (20 ft/40 ft)	Europe, Australia, USA, Taiwan
Dinas PERINDAG Prov. Sumatra Utara	Furniture	N/A	N/A
Dinas PERINDASKOP Kab. Bloro	Furniture	N/A	N/A
Dipta Hira Jaya, CV	Rattan Furniture, Wooden Furniture	20 X 40 ft	Spain, Russia, Australia, Egypt
Dwi Sunda Nusa, PT	Wooden Furniture & Handicraft	20 containers	Europe, USA, Japan, Canada
Dwitama Galeri	Antique Solid Wood	1 container	N/A
Ease International, PT	Fabric & Wooden Furniture	4 x 40 containers	Europe, (Spain, Italy, Portugal)
East Colonial (Koloni Timur, PT)	Teak Furniture	5-6 containers	Europe, Asia, Australia
Eksotika Abadi, PT	Furniture	18-20 containers	USA, Europe, Middle East, Japan
Erinco, CV	Teak Cabinet, Table	4 x 40" containers	Netherlands, UK
Erlangga BNH, PT	Rattan Furniture	40 containers	Europe, South America
Estu Agung Abadi, PT	Rattan Furniture and Wooden Furniture, Baskets, Accessories	N/A	USA, Europe, Spain, South America, Australia, Japan
Faalih Nature Craft	Ceramic	1,000 pcs/1 container	Netherlands, Spain, Australia, USA, etc
Farindo Jaya Persada, PT	Wicker & Wood Combination Furniture	60 containers	USA, Europe, Australia, South America, Japan
Farindo, CV	Rattan & Wood Furniture	3-4 containers	Australia, Hungary, Peru, Spain
Findora Internusa, PT	Basket & Rattan Furniture	150 containers	Europe, Asia, Africa, Australia, USA
Fuerte	Modern and Contemporary Furniture, Upholstered Furniture, Rattan Furniture, Lamps, Accessories	N/A	Spain, Greece, Italy
Gerbang Surya Permai Rotan, PT	Rattan & Wooden Furniture	60 containers	Japan, Europe, Taiwan, Korea, Middle East, USA
Gloria Repro Furniture	Table, Cabinet	15 containers	Europe, USA
Golden Gate	Furniture	2 containers	Europe, USA
Griya Kriyasta Nugraha	Wooden Furniture & Handicraft	12 containers	Europe, USA, South Africa, Japan
H2O	Handicraft	1 container	Middle East
Hasoeindo, CV	Handicraft	5 containers	Europe, Asia, USA
Hot Wax Furniture	Teak Outdoor & Indoor Furniture	160 m3	Ireland, Spain
Incontri, CV	Furniture	8 containers	Europe, USA, Spain, France, Italy, Egypt, Dubai
Independent Furniture	Rattan & Wooden Furniture	20 HC containers	Europe, USA, Asia

Company Name	Production Items	Export Production	Main Market
Indoexim International, PT	Teak Garden Furniture, Teak Indoor Furniture, Mahogany Furniture, Handcraft, Rattan Furniture	30 containers	Worldwide
Indonesia Antique, PT	Bed Room Set, Living Room, Dining Room	25 containers	Spain, France
Indonesian Concept, CV	Wooden & Rattan Furniture	20 x 40 containers	Europe, Asia, USA
Indonesian Container Desiccant, PT	Desiccant	250,000 units	Asia, Europe, Africa, Australia
Indorack Multikreasi, PT	TV Rack	60 containers	Europe, Japan, Middle East
Infinity Multi Kreasi, CV	Home & Office Accessories, Gift Items, Table, Top Items, Box & Basket Wear	N/A	USA, UK, Spain
Jago Furniture	Furniture	45 containers	USA, Europe, Asia, Australia
Java Focus, PT	Teracota	2-5 containers	Singapore, Europe
Java PT-Jati Visions Raya	Rattan Furniture	40 x 40"HC	Netherlands, Germany, Japan, USA
Jawa Furni Lestari	Furniture	2 containers	Europe
Jawa Good Wood	Furniture	5 containers	Netherlands
Jedok Stone Work, CV	Stone Mosaic/Sone Work	4 containers	USA, France, Spain
Jesshouse Craft	Furnicraft, Cinamou, Accessories Craft	8-10 containers	USA
Jiro Production	Natural	N/A	Spain, USA, Greece
Joshua Cahaya Sentosa, PT	Pottery	6 x 40" containers	USA, Europe, Australia
Kali Jaya Putra, PT	Teak Indoor Furniture, Rattan Furniture, Flooring	78 containers	USA, Japan, Korea, China, Hongkong, France
Kernel Indonesia Potential, PT	Rattan & Wooden Furniture	25 containers/40"	USA, Europe, Australia, Middle East, Mexico, Canada
Kharisma Dewata Bali, PT	Home Living accessories & small Furniture	4 - 5 containers	Europe, USA, Australia
Kharisma Gada Sejati	Furniture	4 containers	Europe, USA
Kharisma Harvest Industry, PT	Rattan Furniture	20 x 40" HC	Japan, Europe
Kharisma Rotan Mandiri	Rattan Furniture	25 -30 containers	UK, USA, France, Italy, Sweden
Kotska Adhi Sentosa, CV	Rattan Furniture	30 x 40 HC	Italy, France, Poland, Germany, Japan
Ladunni Globalindo, PT	Furniture	20 containers	Spain, France, USA, Belgium, Germany, Portugal,
Langgeng Jaya, CV	Rattan, Loom And Bamboo Furniture	20 containers	Europe, USA
Laras International (PT. Tunggullaras)	Indoor Rattan & Wood Furniture	10 x 40 containers	USA, Europe & Australia
Larissa Furni Industries, Cv	Furniture	10 containers	Spain, Italy, Germany, France
Linggar Jati Mulia Abadi, PT	Furniture	N/A	N/A
Luckman Furniture, PT	Rattan & Plastic Furniture	30 containers	Europe, USA, Australia, Japan
Lunar Graha Utama, PT	Furniture, Lighting, Bag	2 containers	Japan, USA, France, Spain
Magetan Putera, CV	Leather Furniture	35 x 40 HC	World Wide
Maharani Kreasi Abadi, CV	Rustic	12 containers	Europe, Australia
Maju Kreasi Sentosa, PT	Stone Art Sculpture, Various Handicraft	2 x 20" containers	Europe
Maraton Kencana, PT	Furniture & Handicraft	2 containers 40 HC	USA, Europe
Mariposa Jakarta, PT	Solid Teak Furniture	8 - 18 containers	Europe, UK
Mebel Orang Indonesia	Indoor Furniture	8 - 10 containers	Spain, Israel, Colombo, Singapore
Meranindo Jaya Mandiri, PT	Flooring/Decking	N/A	China
Mirota Persada, PT	Furniture	10 containers	Europe, USA

Company Name	Production Items	Export Production	Main Market
Mitra Anugrah Gemilang, PT	TV Rack	20 x 40"	Middle East, Africa, Australia, India
Modern Furniture	Indoor Furniture	N/A	N/A
Mulia Jaya Furniture, CV	Rattan Furniture	7 - 15 containers	Europe
Mutina Jaya Abadi, PT	Teak Indoor & Outdoor Furniture	3 containers	Austria
Nandy Astika	Furniture	7 containers	France, Netherlands, Spain
Natania Jati Lancar Pratama, CV	Garden Furniture	10 containers	USA, Europe
Nebula Craftwork	Aneka Lilin, Decorative Kayu, Frame, Ceramic	20 x 40"	Europe
Nice Antique	Antique Reproduction Furniture, Indoor and Outdoor Furniture, Rattan (woven) Furniture, Wood Working	8 - 10 containers	USA, Australia, Europe, Middle East
Nine Square Indonesia, PT	Home Decorator, Lighting, Furniture	15 x 20 ft	Europe, USA, Africa, Japan
Nova Furniture	Furniture	40 containers	Europe
Padma Citra Amahi, PT	Wooden Furniture	10 containers	USA, Europe, Australia, Hong Kong
Padmaloka Internasional, PT	Garden Furniture/Indoor Furniture	20 containers	USA, Europe
Pakar Widya Chemindo, PT	Sarpeco 8	N/A	N/A
Palm Craft Yogya, CV	Handicraft	4 containers	Spain, Italy, Middle East
Palmae Square	Handicraft	7 - 10 containers	Europe, USA
Pandanus Internusa, CV	Handicraft	4 x 40 ft	USA, Australia, Europe, Japan
Payon Agung Lestari, PT	Rattan Furniture	N/A	USA, Italy, France, Barbados, UAE
Pekerti Nusantara	Handicraft	2 containers	Europe
Pelita Mulia Pratama, PT	Wooden Garden Furniture	N/A	USA, Japan, Germany
Perfecto, CV	Rattan Furniture, Wood, Iron, Aluminum	4 containers	Europe, Middle East, Asia, USA
Permata Abadi Furniture	Indoor Furniture	4 containers	Spain, Netherlands, France
Piramida Rattan Industry, Cv	Ratta, Abaca, Waterhyacinth Furniture	35 HC containers	Europe, Africa, USA
Piviko Manunggal, PT (Indostyle)	Handicraft (terutama Natural Hardware & Hand Bag)	4 containers	USA, Canada, Japan, Europe
Swabina Karya Indonesia, PT	Mosaic Pebbles Tile, Mosaic Marble Tile, Loose Pebbles Tile, Standing Pebbles Tile, Mosaic Stone Tile	4 containers	USA, Europe, Asia
Polymindo Permata, PT	Synthetic Fiber	N/A	Asia, Europe, USA
Prayan	Table Lamp, Mirror, Photo Frame	2 x 20 ft	Spain, Australia
Prolindo Originals Perkasa, PT	Rattan Furniture & Indoor Wooden Furniture	10 containers	Europe, Africa, Australia
Propan Raya, PT	Wooden Finishing Product of Furniture & Interior	N/A	N/A
Property, CV	Rattan, Wood, Lloyd Loom, Outdoor	40 containers	Europe, Australia, Japan
Pulung Gembol Jati, CV	Rustic Furniture, Nature Furniture, Wooden Handicraft	5 containers	Europe, USA, Australia, Japan, CH
Puri Jepara Furniture	Mahogany Teak & Bamboo	15 containers	Europe, South Africa, USA
Putra Harapan, CV	Wood & Rattan Furniture	15 - 20 containers	Europe, Australia, Middle East
Quadrplast, PT (Ngayam)	Synthetic Fiber/Synthetic Rattan	100 ton	Europe, USA
Rakabu Furniture	Indoor Furniture	60 containers	Europe, USA, Australia, Spain, Italy, France
Rattan Cantiq Indonesia, PT	Lyod Loom, Aluminum/Synthetic	6,000 pcs side chair	Germany, Austria, Belgium, Switzerland

Company Name	Production Items	Export Production	Main Market
Ravindo Craft, CV	Furniture & Basket	10 containers	Europe, USA
Rimba Sentosa, CV	Garden Furniture & Indoor Teak Furniture	12 containers	France, Germany, Greece, Denmark
Roda Jati Solo, CV	Teak Furniture	10 containers	Europe, USA
Roda Jati Wonogiri, CV	Garden Furniture	N/A	Germany, Netherlands
Rose Three Furniture, CV	Wood Furniture	12 containers	Spain, Italy, France
Rumah Jawa Lestari, UD	Furniture	3 containers	France
Safiya Furniture	Indoor and Teak Garden Furniture	5 containers	Europe, USA
Sasana Antique	Teak & Wood Working	10 containers	Europe, USA
Segoro Mas Solo, PT	Furniture	6 - 8 containers	Netherlands, Germany, Spain, France
Sentra Cipta	Indoor Furniture	10 containers	Europe, Asia
Sinar Mas Furniture, UD	Wooden Furniture & Handicraft	6 - 8 containers 40"	Europe
Sinara Maximum Nusantara, PT	Rattan Furniture	40 x 40"	Asia, USA, Europe, Middle East
Sultan Agung Craft, CV	Garden Furniture	20 x 40"	Europe
Sumber Alam Rattan, CV	Furniture & Basketry	30 x 40" HC	Europe, USA, Australia, Korea
Sungilindo Jaya Makmur, PT	Plastic Rattan "Polystrand"	N/A	N/A
Super Dry, PT	Dry Pole 1000 & Dry sac 1000 - 1400 gr	± 300 ton	China, Europe, USA
Tanamas Industry	Rattan Furniture, Basket, Wooden Furniture	100 x 40"	Italy, France, Spain, USA, Germany, Canada etc
Tekad Bangkit Furniture	Leather Furniture & Others	2 - 3 containers	France, Spain
Temam Lama	Furniture	N/A	Europe
Terang Fajar Persada, PT	Rattan & Wood Furniture	± 60 containers	USA, Europe, Middle East, Japan
The Ritz Lobby Furniture	Furniture	10 containers	Europe, USA
Timboel Keramik	Teracota	15 containers	Italy, Netherlands, Spain, etc
Tirta Basuki	Handicraft & Stone Art	2005	Greece, Saudi Arabia, etc
Tirtawarna Piranti, CV	Iron, Wooden Furniture	4 containers	Sevilla - USA
Trinity Collection	Handicraft	N/A	USA, Europe, Middle East
Tulus Tri Tunggal, PT	Door, Door Frame, Architrave	30 x 20" containers (door)	Europe, Middle East, Australia, Asia, Africa
Tumutu Pulung Jaya, CV	Leather Furniture & Handicraft	N/A	N/A
Versaguna Internatioanal, PT	Home Accessories	5 containers	USA, Europe
Vina Arya Furniture, CV	Chic Contemporary Furniture	8 - 20 containers	Japan, Spain, Portugal, Middle East
Wahyu Dewata Craft, CV	Lilin	N/A	Europe
Wirasindo Santakarya, PT (Wisanka)	Teak & Alloy Garden Furniture	20 containers	Europe, USA, UK, Middle East, Australia, Japan
Yale Setya Sentosa, PT	Rattan Furniture	10 containers	Spain, Denmark, Italy, Hungary
Yoni - Art Rustic Furniture	Furniture	5 containers	Europe, USA, Asia
Yudhistira, CV	Indoor & Furniture	30 containers	USA
Yusmou Industry Indonesia, PT	Rattan Furniture	15 - 40 containers	Europe, Asia, Middle East, Australia
Zakra Kabir International, PT	Furniture & Handicraft	25 containers	Europe
Zico Rattan	Living Set	15 Containers	Europe, USA
Gema Graha Sarana Tbk, PT	Home & Office Furniture, Flooring, Art & Craft	25 containers	Korea, USA

APPENDIX 3: FURNITURE VALUE CHAIN OVERVIEW





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SENADA
INDONESIA COMPETITIVENESS PROGRAM

GARMENT INDUSTRY VALUE CHAIN (IVC) REVIEW:

Operational Mechanisms and the Inter-Relationships of Firms in the Garment IVC

February 16, 2007

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DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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This report serves as an extension to SENADA's *Indonesia's Competitive Environment* study which was published in March 2006.

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RESEARCH AND METHODOLOGY

In order to attain more insight into the footwear, furniture, garment and automotive component industry value chains (IVC), SENADA commissioned a team to conduct research in and around Jakarta, Surabaya, Bandung, and Semarang for 6 weeks. Information was collected from multiple sources and included interviews with suppliers, manufacturers, distributors, retailers, associations and donor organizations, as well as secondary research via the Internet (*see Appendix 1: IVCS interview list*). Specifically, this project had 3 objectives:

- Map the value chains, from input suppliers to end consumers, including the principal characteristics of the firms and organizations that drive the value chain;
- Describe the mechanisms and the inter-relationship of these firms throughout each step of the IVC
- Provide a breakdown of costs and profit margins for representative products within each IVC

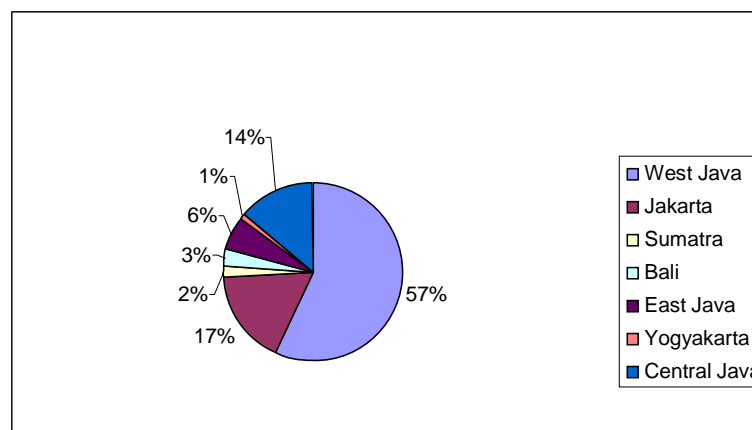
This report provides an overview of each industry and a detailed analysis of material/product movement throughout each IVC. Based on our findings, SENADA will map previously identified constraints to gauge where along the IVC our assistance will be most effective.

GARMENT INDUSTRY VALUE CHAIN

Overview of the Indonesian Garment Industry

The textile and garment industry is the largest of Indonesia's non-oil and gas industries, and directly employs an estimated 1.8 million people. Of this figure, 63% are employed in medium-to large-scale operations and 37% in small-scale firms. Both textile and garment production are concentrated in Java, especially West Java, which accounts for 57% of these businesses¹, followed by Jakarta (17%) and Central Java (14%)¹.

FIGURE 1: DISTRIBUTION OF GARMENT PRODUCERS IN INDONESIA BY REGION



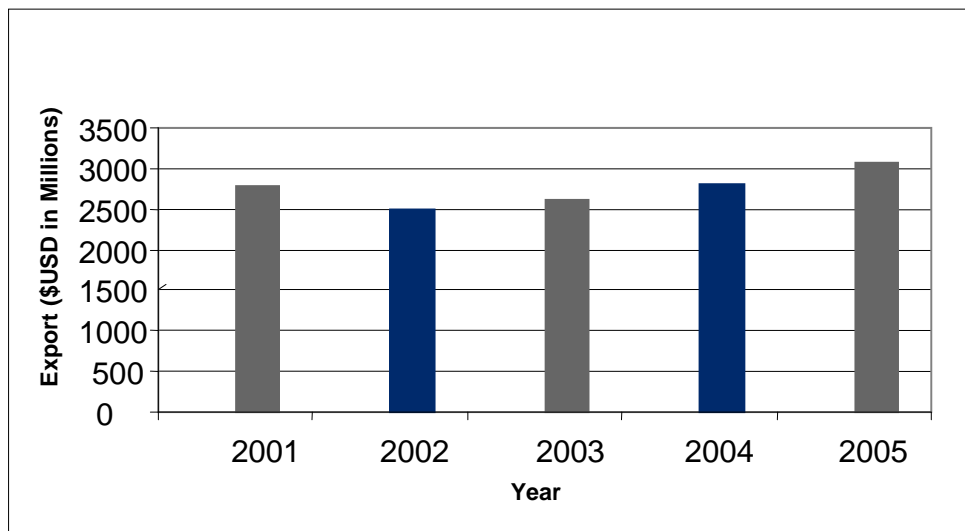
¹ Central Bureau of Statistics; Compiled by API

Textile production is comprised of three activities, these being fiber production, spinning and weaving/knitting. Indonesia is the seventh-largest fiber producer in the world, producing 1.5 million tons in 2004 at a value of USD \$672 million. Following fiber production, spinning is the next step in textile production. Indonesia has the fourth-largest spinning capacity of any nation, generating USD \$2.64 billion in 2004. Lastly, Indonesia has the third-largest weaving/knitting capacity in the world, and produced products worth USD \$3.89 billion during the same year².

As may be expected, the Indonesian garment industry is intrinsically intertwined with textile production and has historically been a leading sector of macroeconomic growth. In 2005, garment sales were a combined USD \$4.27 billion, with 71% of this being export revenue (USD \$3.07 billion) and the remaining 29% domestic revenue (USD 1.2 billion). According to API, the Indonesian textile and garment association (*see Appendix 2: API Member List*), there are 861 registered garment producers that employ a total of 353,590 people. However, this figure represents a significant underestimate if we consider the entire garment industry, as it does not take into account the micro and small enterprises that also produce for the domestic market.

From 2001-2005, export garment sales have increased 10%, from USD \$2.78 billion in 2001 to USD \$3.07 billion in 2005.

FIGURE 2: EXPORT GARMENT SALES FROM INDONESIA (2001-2005)



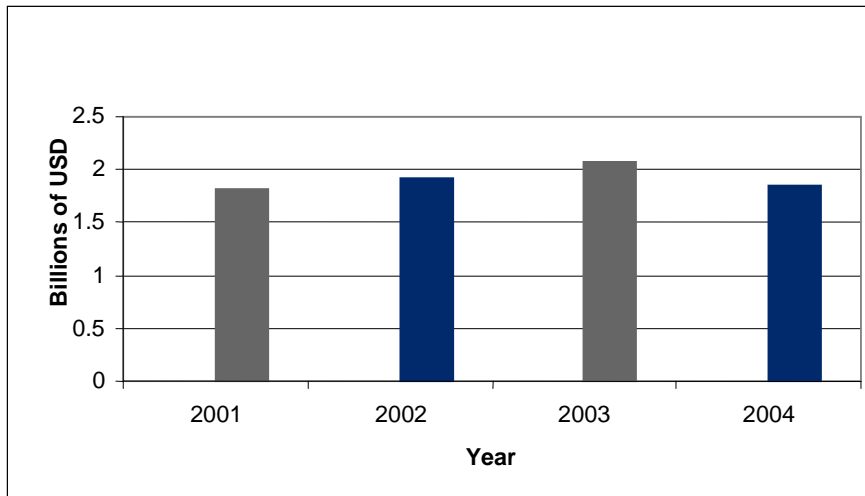
The largest share of Indonesian garments is exported to the United States (31%), followed by the EU countries (21%) and other ASEAN countries (7%). In 2004, Indonesia was the 9th largest garment exporter in the world³.

With regard to the domestic market, sales have increased only 2% from USD \$1.81 billion in 2001 to USD \$1.85 billion in 2004.

² Central Bureau of Statistics; Compiled by API

³ Central Bureau of Statistics; Compiled by API

FIGURE 3: DOMESTIC GARMENT SALES (2001-2004)



One significant development within the domestic market is the increased reliance on imported garments. In 2001, the official value of imported garments was USD \$17 million, while this figure increased to USD \$53 million in 2005. According to API, the key driver of increased imports is tighter price competitiveness, predominantly from Chinese manufacturers, whose goods either enter Indonesia directly or via Singapore or Hong Kong⁴.

Garments: Domestic and Export IVC Product Flow

To gain a more thorough understanding of the operational mechanisms and interrelationships of firms in the garment IVC, SENADA mapped the movement of materials and product, from input supplier to end consumer, for both the domestic and export markets (*see Appendix 3: Garment Value Chain Overview*).

Garments: Input Suppliers

The inputs needed for garment production are sourced from the fiber, spinning and weaving/knitting industries. Within Indonesia, there are 28 registered large-scale fiber manufacturers, which employ nearly 30,000 people and are primarily located in West and Central Java. These manufacturers produce nylon, polyester and rayon. Fiber production requires a significant investment in equipment and, consequently, does not typically include SMEs.

Once a fiber is created, it is usually mixed with cotton and spun to produce yarn. Similar to fiber manufacturers, spinning factories are large in scale and also require substantial investment in machinery. There are 204 registered spinning factories in Indonesia with a total of 207,764 employees. After spinning, yarn is knitted/woven and, if necessary, dyed to give the desired color. Most small-scale knitting/weaving firms do not have the equipment or expertise to dye and finish yarns. Consequently, their products are sold to larger knitting/weaving firm that have the

⁴ Central Bureau of Statistics; Compiled by API

capability to do both. There are 1,044 registered knitting/weaving companies in Indonesia, employing a total of 343,988 employees⁵.

Payment terms for parties with established relationships are typically “net 30”, meaning the entire balance of payment must be made within 30 days to the raw material supplier. However, for first-time transactions, cash on delivery is the most common payment method. Inputs for garment production are typically delivered directly to the manufacturer’s facility by the supplier, where a percentage of the delivery is inspected to ensure compliance. Typically, most medium- to large-scale operations utilize some type of formalized quality control system (e.g., checking 10% of all incoming supplies), while most small manufacturers do not. In the event that a shipment does not initially meet the agreed standards, a more rigorous examination will be conducted (e.g., 25% of input supplies are randomly selected and checked). It is the responsibility of the input supplier to redeliver any goods deemed defective.

Garments: Production

Typically, garment manufacturers use nylon, rayon, polyester and cotton as the basic raw materials for clothing production. Large garment manufacturers purchase their fabrics directly from local manufacturers or import specialty fabrics from overseas mills or through an international trading company that works for a small commission (e.g., 2-5%). Smaller-scale garment manufacturers usually purchase fabrics from domestic wholesalers, located in the Tanah Abang market in Jakarta, where 2,000 wholesalers operate out of shop-houses that serve as both their offices and stores. Goods are transported within the Tanah Abang market mostly by handcart.

Rolls of fabric are delivered to the factory for sorting, cutting and sewing. Accessories, buttons, zippers and sewing thread are also generally purchased from local vendors in Tanah Abang. Indirect materials, such as surfactants, and sizing and coloring agents, are purchased from intermediary vendors, who source from either domestic suppliers or import from various countries, such as China, Korea, Taiwan and Japan.

Garment production begins with development of a design. There are three common approaches to design, each of which is dependent upon the end-consumer market. Manufacturers that sell their garments in small-scale domestic retail shops create their own designs based on their knowledge of current trends in the market, while garment producers that sell to large-scale domestic outlets (e.g., Metro) are usually given product-design specifications from a buying agent. For export, manufacturers are also provided with designs by the large retail outlet in question (e.g., Sears, JC Penny).

Once a design has been finalized, the manufacturer prepares a production plan incorporating all the necessary parts (e.g., sleeves, collar, trimming) to create a complete article of clothing. Operations are then allocated accordingly. Assembly and sewing of the individual parts are predominantly manual and have changed little over time. The key difference between garment producers is generally the size of their workforce, which can vary substantially from a micro-enterprise with less than 50 employees to a large-scale operation with 8,000-10,000 employees.

⁵ Central Bureau of Statistics; Compiled by API

Employees are usually grouped in clusters, with each cluster focusing on completing a single activity (e.g., cutting fabric, threading buttons, etc...). Although similar to footwear in that this industry is also labor intensive, garment production does not follow the same type of “start-to-finish” process resulting in the completion of a single finished product. Instead, production is more batch focused, in that different groups of employees are simultaneously working to fulfill multiple production orders. For example, it is not uncommon (especially among the larger firms) to have several groups of employees working on producing very different items, such as jeans, T-shirts and dresses, at the same time.

Quality control is an integral component of a well-managed garment manufacturer, and is necessary both to reduce costs through minimizing defects and to ensure customer satisfaction. Firms involved in the export trade have the most stringent systems in place, while those focused on the domestic market are typically more lax. This quality-control function is usually accomplished by having quality managers review products at key steps during the production cycle.

Upon completion, garments are packed in boxes and warehoused for future distribution. The length of time finished goods stay in the warehouse depends upon both the volume of the production order (larger orders remain warehoused longer as they are generally not shipped until the entire order is complete) and whether the goods are to be exported or not (volume adequate to fill a container).

Garments: Distribution

Domestically, the market for fashion goods is in the mid- to upper-price range. Local department stores such as Metro, Millenia and Matahari have their own wholesale and logistics operations, and purchases from SMEs are directed to their warehouses. Payment terms are a maximum of net-30 days. However, in certain cases, a local buying agent may pay 30% on a purchase order and the balance two weeks after delivery. Some local buying offices have enough market power to demand consignment terms from the manufacturer, eliminating all risk in the transaction for the big, successful buying agents.

Smaller volume sales in the domestic market are typically made on a cash-only basis. Garment wholesalers based in Tanah Abang or Mangga Dua purchase goods directly from the manufacturer. These goods are packaged and transported from the wholesale market by truck or, for smaller purchases, by car. Depending on the volume purchased, garments may be warehoused by the wholesaler or taken directly to the retail store for sale to the end consumer.

Export purchases are coordinated by buying agents. Basic and standard items of apparel are sold to global superstores, such as Wal-Mart and Carrefour, while fashion goods are sold to global-brand import/distributors. Sell-through is almost assured, provided quality meets minimum standards and the style does not go through any radical transformations. Unsold goods can be returned in some cases to the manufacturer or re-channeled to small retailers or kiosks, where they will be sold at much lower prices.

Export is generally carried out using a letter-of-credit (L/C), which is a document issued by the buyer’s bank that essentially acts as an irrevocable guarantee of payment. The export process begins after a buying agent (e.g., individuals who approve the purchase and receipt of garments for multinational firms such as Benetton, Lacoste, Polo, etc.) inspects a sample of the goods to be

shipped. If approved, the garment manufacturer contacts a freight-forwarding company (e.g., PT Maersk, PT Forin Antarbuana Flyindo, PT Schenker Petrolog Utama), that schedules pick-up and provides all necessary documentation for shipping.

Upon agreement, an empty container from the freight-forwarding company is delivered to the manufacturer's facility and loaded with the finished goods. After being loaded, the container is driven to the shipping port (e.g., Tanjung Priok), where it is unloaded and placed on a commercial vessel. This is generally the point where the buyer accepts responsibility for the shipment, in an arrangement known as free-on-board (FOB).

Goods shipped by sea take 4-5 weeks to arrive in the destination country (e.g., Europe, USA). After clearing customs, the goods are loaded onto a truck and delivered to the buyer's warehouse for eventual delivery to retail outlets. The cost of shipment within the final destination country varies, with either the freight-forwarding company or buyer covering the costs.

Garments: Product-cost breakdown

To gain a more comprehensive understanding of the respective costs and gross margins during each stage of the overall garment IVC, we analyzed a pair of blue jeans destined for the export market.

PRODUCT COSTS	PRICE (USD)	PERCENTAGE OF TOTAL RETAIL COST
RAW MATERIALS		
Fabric	\$2.05	
Accessories	\$0.82	
Raw Material Supplier's Markup	\$0.45	
TOTAL RAW MATERIALS COST	\$3.32	18%
PRICE TO MANUFACTURER	\$3.32	
MANUFACTURING		
Freight to Manufacturer	\$0.07	
Labor	\$0.65	
Indirect Materials	\$0.95	
Packaging	\$0.26	
Overheads	\$0.42	
Manufacturer's Markup	\$0.65	
TOTAL MANUFACTURING COST	\$3.00	16%
PRICE TO WHOLESALER	\$6.32	
WHOLESALE		
Freight to Importer	\$1.00	
Importer's Markup	\$4.00	
TOTAL WHOLESALE COST	\$5.00	26%
PRICE TO RETAILER	\$11.32	
Freight to Retailer	\$0.56	
Retailer's Markup	\$7.00	
TOTAL RETAIL COST	\$7.56	40%
RETAIL PRICE	\$18.88	100%

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APPENDIX 1: INTERVIEW CONTACT LIST

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
APRISINDO	Footwear	Indonesian Footwear Association	Singgih Witarso	Jl. Tanah Abang III No. 18; Jakarta 10160	(21) 3447575
PT Sumber Kreasi Fumiko	Footwear	Footwear Distributor	Yongki Komaladi	Jl. Sentani Raya Blok M No. 29; Kemayoran Jakarta Pusat 10720	(21) 6402277
ASMINDO	Furniture	Indonesia Furniture Industry and Handicraft Association	Sae Tanangga Karim	Jl. Pegambiran No. 5a 3rd floor Rawamangun; Jakarta 13220	(21) 47864028
Reksa Group	Automotive Components	Autoparts Distributor	Moh. Aminduddin	Jl. Raya Graha Kembangan Asri K-8; Gresik Jawa Timur	(31) 3952550
PT Arta Glory Buana	Garments/ Textiles	Garment Producer	Dr. Willy Josep C.	Jl. Raya Gelam 40; Candi-Sidoarjo 61271	(31) 8961508
Mikronika International	Automotive Components	Tool and Die Manufacturer	Heri Prasetyo Budi	Jl. Ngingas Selatan No. 14a; Waru-Sidoarjo	(31) 8534171
International Finance Corporation (IFC)-PENSA	Furniture	Sustainable Wood Program	Moray McLeish	Jl. Raya Puputan No. 488; Renon Denpasar 80226	(361) 265350
GIAMM	Automotive Components	Indonesian Autoparts Association	Hadi Surjadipradja	Jl Kelapa Hybrida Raya Blok QH XII No.2 Kelapa Gading	(21) 4515587
GAPPEPSI	Footwear	Footwear Distributor	R. Tutang Mochtar	Jl Wanajaya No.22 Blk 6b Rt.002/003 Pasirjaya Kota Bogor Barat 16119	(251) 632759
PT Hangah Palah Sejahtera	Footwear	Footwear Producer	Goi Hui Hwa (Wawan)	Jl Sultan Agung Pasar Rumpug No.2-4 Jakarta	(21) 83703689
PT Intrapenta Jaya Sakti	Footwear	Footwear Distributor (trading company)	Albert Tansil	Komp. Cita Graha Jl Panjang No.26 Blok 2L Kedoya	(21) 5819089
PD Bangun Tridharma	Footwear	Footwear Producer	Marga Singgih	Komp Gunung Sahari Permai Blok E No.5 Jl Gunung Sahari No.60	(21) 4208525
API (Asosiasi Pertekstilan Indonesia)	Garments/ Textiles	Indonesia Textile Association	Ernovian G. Ismy	Adhigraha Lt.16 Jl Gatot Subroto 56 Jakarta	(21) 5272171
PT Braja Mukti Cakra	Automotive Components	Autoparts Producer	Santoso Wardoyo	Jl Desa Harapan Kita No.4 Harapan Jaya Bekasi Utara 17124	(21) 8871836

Organization Name	IVC	IVC Function	Contact Person	Address	Phone
PT Dharma Elektrindo Manufacturing	Automotive Components	Autoparts Producer	Gagat Prijawan	Jl Jababeka III H Blok C 17W Cikarang Industrial Estate I Bekasi	(21) 89832677
PT Gelora Salix Prima	Furniture	Furniture Producer	Sudjono Kosasih	Jl Raya Serang KM; Tangerang 15610	(21) 5950385
GAIKINDO	Automotive Components	Indonesian Automobile Manufacturer s Association	Nogar Jito	Jl Cokroaminoto 6; Jakarta Pusat	(21) 3157178
PT Dhaya Tuhumitra	Footwear	Footwear Producer	Max Loekito	Jl Cibolerang 120; Bandung 40224	(22) 5402660
Procio	Footwear	Footwear Producer	Hikmat	Pasar Gambir Kemayoran; Blok D-1 Apt. 9 Jakarta Pusat 10620	(251) 632759
Ministry of Industry	N/A	Government Ministry	Djumarman	Jl Jend. Gatot Subroto Kav. 52-53 Lt. 19 Jakarta 12950	(21) 5251132
APKI (Asosiasi Penyamak Kulit Indonesia)	Footwear	Tanning Association	Agit Yuwono	Jl Jembatan Dua No. 14, Jakarta 14450	(021) 669-3629/ 0816725986
PT Daraya Multi Nine	Garments	Garment Buying Agent for Local Hypermarket	Susi Suraya	Jl Kemang Raya No. 83H	(021) 718-0443
PT Indofacing Indonesia	Automotive Components	Component Manufacturer	Iwan Pradjinata	Jl Raya Banjar Sugihan No.7, Surabaya, East Java	(031) 740-5548
PT FSCM Manufacturing Indonesia	Automotive Components	Component Manufacturer	Harjanto	Jl. Bypass Krian Km. 26 No.8, Surabaya, East Java	(031) 897-2425
Central Java Indonesian Trade & Investment Center	Furniture	Furniture Trader/Broker	Dewi Artati	Jl. Java Design Centre, 2nd floor, Jl Imam bonjol 154-160, Semarang 50139	(024) 358-3577
Muslihin	Furniture	Furniture Manufacturer	Muslichin	Kawasan Industri Candi, Jl. Gatot Subroto Blok 23/9, Semarang	(024) 7626864
Masyarakat Industri Kehutanan-Jawa Tengah	Furniture	Forestry Industry Community	HM Wiradadi	Gedung Java Design Center LtII Jl. Imam Bonjol 156-160, Central Java	(024) 3521241

APPENDIX 2: API MEMBER LIST

Company Name	Number of Employees	Production Items
Aarti Jaya, CV	75	Jacket 150,000 Pcs P.A
Aba Garmen	10	Clothing
Abadi Jaya, CV	N/A	Sweater 2,500 DZ/Y
Adityadasa Cipta Manunggal, PT	600	Fashion Denim & All Kind of Jeans Wear
Adiyasa, CV	16	Trousers, Childrens wear : 600 DZ/Y
Aek Natiotama, PT (Tridakom Nusantara, PT)	200	Sweater, Polo Shirt, Jackets, T-Shirt
Agrabusana Insani, PT	N/A	Nylon Taveta, Nylon Polyester
Agung Busana Jaya, PT	735	Blouse, Shirt, Skirt, Trousers
Agus, CV	16	Dress: 50,000 pcs, Pant: 60,000 pcs, T-shirt: 60,000 pcs, Sarong: 150,000 pcs, Skirt: 40,000 pcs, Blouses: 70,000
Airin Bali, PT	250	Jacket Spring & Winter, Overall (sport), Jogging suit, Short pant
Akurabenitama, PT	244	T-shirt 300,000 pcs PA, Poloshirt 100,000 pcs PA, Fasuna 100,000 pcs PA, V-Nect 100,000 pcs PA, Trouser & Sport Wear 300,000 DZN PA
Al-Ichwan Ltd, PT	1,400	Jean Trousers, Short Pants, Jackets, Ladies skirt, Blouses
Aliri, PT	1,244	Gown, Sport wear, Children wear
Alisanto Penta Garment, PT	1,200	Ladies gown 2,000 DZ PA, Blouse 1,500 DZ PA, Shirt 1,500 DZ PA, T-shirt 2,000 DZ PA, Pant 2,000 DZ PA, Bedsheet, Pyjamas, Swim Truks
Alisindo Penta Garment, PT	1,287	Product garments
Alpha Sigma Bali, CV	N/A	Skirt, Top, Pant, Jacket, Blouses
Altara, CV	N/A	N/A
Alfa Omega, CV	N/A	Sweater
Always Remember Good (Alrego, PT)	450	Jeans, Trousers, Jacket, Skirt, Shirt, Blouses, Short
Amar Rex Utama, PT	800	Jacket, Coats, Track
Amarta Wisesa, CV	N/A	Clothing
Amiera Studio, CV	N/A	Product garments
Andora Pratama, PT	N/A	Blouse, Skirt, Casual, Blazer, Pant
Andree Garment Bali, PT	970	Dresses, Pants, Blouses, Shirt, T-shirt
Aneka Citra Garment Group, PT	N/A	Product garments
Aneka Sandang Busana Garment, PT	150	Shirt 92,250 DZ PA, Blouse 43,000 DZN PA, Children wear 22,000 PA
Angcaris Utama Garment, PT	N/A	Product garment
Angelson Internusa, PT	300	Jacket, Skirt, Trousers, Jean, Children s wear, Shirt
Angkasa Jaya, CV	200	B licra, W licra, Blouse, Shirt, T-shirt, Pants, Jacket
Anugerah Usaha Sejati, CV	N/A	Sweaters, Sock 15,000 DZ/Y
Anugrah, CV	20	Product garments
Anugrah Daya Supplindo, PT	110	T-shirt, Sleep wear, Sweat shhirt, Jogging suit, Creeper
Anup Enterprise, PT	253	Blouse, Shirt, Long Trousers, Children Wear
Apac Citra Centertex Tbk, PT	3,000	Blouse, Trouser, Jacket, Shirt, Tops, Dresses, Casual bottoms
Ardiyanto Wijayakusuma Batik, PT	680	Shirt, Pyjamas, Dress, Batic t-shirt
Arilla Adhi Setiajaya, PT	N/A	Product garments
Arinco Karya Jaya, PT	N/A	Product garments

Company Name	Number of Employees	Production Items
Arindo Garmentama, PT	N/A	Product garments
Arrish Bali Busana, CV	N/A	Dress, Pant, Skirt, Shirt
Aryabumi Intercontinental, PT	30	Product garments
Asaputex, PT	N/A	Product garments
Asia Prima Guna, PT	N/A	Product garments
Asia Prima Sejahtera, PT	1,105	Trousers, T-shirt, Shirt, Glove, Knitwears, Blouse, Jacket, Jeans, Sock, Children wear} = 1,080,000 DZ PA
Asia Garment, CV	N/A	s
Asli Indo Busana, CV	20	Product garments
Asni Pusaka Putri, PT	N/A	Product garments
Aspindo Wisesa, PT	50	Ladies wear
Awimina, PT	45	Lady's garment
Asri, CV	20	Ladies & Gent wear: 20,000 pcs/month
Ayu Orchid, CV	600	Blouse: 66,651 pc, Top/Kemi: 83,295 pc, Vet 32,003 pc, Long Pant: 72,559 pc, Skirt: 37,655, Jacket: 59,505 pc, Dress/Jumpsuit: 4,921 pc
Ayumas Busana, CV	25	Ladies wea: 100,000 DZ, (Dress, Top, Shirt, Pants, Jackets
Badan Tekstil Nasional, PT (BTN)	1,500	T-shirt, Casual shirt, Polo Shirt, Blouse, Jumpsuit, Babies wear
Bahtera Kencana, CV	18	Product garment
Baik Baik, CV	300	Polo shirt 2,000 Doz PA, Romper 2,000 Doz PA, Shirt 2,000 Doz PA, Dress 2,000 Doz PA, Blouse 2,000 PA, Skirt, Pants, Jackets, Dresses
Baka Busana Indah, PT	735	Jackets 150,000 DZN PA
Bakrie Hyosung Apparel, PT	N/A	Dress: 6,000 pc, Top: 25,000 pc, Pants: 1,000pc, Jacket ladies cotton, T-shirt Rayon Jersey Jeruk, Set Rayon Jersey Jeruk
Bali Batur, CV	N/A	Blazer, Jackets, Blouses, Dress, Skirt, Trousers
Bali Busana, PT	250	Shirt, Dresses, T-shirt, Pants, Blouses
Bali Collections, CV	450	T-shirt, Pants, Vest, Skirt, Blouses, Dresses, Gown, Shirt
Bali Delta Express, CV	N/A	N
Bali Design, CV	26	Dress, Pant, Blouses, Shirt, Bikini, etc 5,000 pcs/y
Bali Dewata, Cv	40	Product garments
Bali Intercont Prima, PT	N/A	Product garments
Bali International Cargo, PT	N/A	Shirt
Bali Intima Indah, PT	250	Underwears
Bali Nirwana Garments, PT	500	Jeans, Blazer, Shirt, Blouse, Trousers, Skirt, Jackets
Bali Parmita Kreasi, PT	N/A	Product garments
Bali Roses, CV	310	Pants, Shirt, Jackets, T-shirt, Nite Dress, Body Suit
Bali Super, CV	180	Product garment
Baliarga Namura Prima, CV	31	Shirt 12,000 pcs PA, Trousers 24,000 pcs PA, Jumpsuit 4,000 pcs PA, Jackets 1,000 pcs PA, Skirt 7,000 pcs PA, Longdress 6,000 pcs PA, Short dress 8,000 pcs PA
Bali Biasa Indah Koleksi, PT	N/A	Product garments
Balihides Indonesia, PT	1,307	Leather garments
Balimoon, CV	162	Tank Top: 125,000 Pcs/Y, Blouse: 120,000 Pcs/Y, Skirt: 1000,000 Pcs/Y, Long Pant: 150,000 Pcs/Y, Shirt: 150,000 Pcs/Y, Bermuda: 150,000 Pcs/Y

Company Name	Number of Employees	Production Items
Balimulia Busana, PT	N/A	Sweater: 60,000 Doz/Y
Baliwig, PT	200	Rousers 75,000 DZ PA, Jacket 10,000 DZ PA, Skirt 12,500 DZ PA
Bandung Indah Gemilang, PT	200	Bed Sheet, Bed Covers 1,200,000 Pcs PA
Bangju Kornesia, PT	400	Nylon Bags
Bangun Laju Industri Garment (PT Bali Garment	850	Winter & Summer Jacket, Duck Down Jackets
Bapamco Inti Pradana, PT	N/A	Sweater, T-shirt, Man Shirt, Ladies Blouse
Barisan Utama Textil, PT	368	Shirt, Blouses, Trousers, Skirt, Men s & Ladies Woven Shirt
Batam Knitting Factory, CV	N/A	Pant, T-shirt, Jacket
Batara Wahanamas, PT	706	Polo shirt, Golf shirt, Sweatskert, Rugby shirt, Sweat Shirt, Golf shirt } 240,000 DZ PA
Batik Dinar Hadi, PT	N/A	Batik Garment for Ladies & Gents, Batik Material by Piece Roll for Dresses/Furnishing, Batik household appliance as: cushion, table, cloth, bed shett, small items of batik such as: bags, purses, ties, toys, etc
Batik Dekik	12	Jilbab, Sarung Panatai
Batik Dewi Kunti, PT	N/A	Product garment
Batik Keris, PT	2,000	Printing Pabrics
Batik Semar, PT	366	T-shirt, Blouse, Dress, Skirt, Batic garment
Batik Sida Mukti	100	Sarong, Shirting batiks
Batik Suryakencana, PT	200	Cotton shirt, Cotton dress, Batics, Table Cover
Behaestex, PT	1850	Pilgrimage dresses, Moslem wears, Caps, Sarong
Bengawantex, PT	560	N/A
Benoli Inti Karya, PT	350	Boxer short, Baby sets
Bents Ranggje Sejahtera, CV	N/A	Product garments
Berkat Busanatama Garmindo, PT	185	Shirt 6,000 DZ PA, Trousers: 12,000 DZ PA
Bersamajadi Gemilang, PT	N/A	Sport wear, Sweat shirt, Children wear, Jogging sets, T-shirt, Polo shirt, Night gown, Pants, Man shirt
Bertona Unggul Perdana, CV	300	Institutional linen (table cloths, napkins, bed sheets, kitchen cloths, place mats, curtain, bed covers, bed pads, pool towels, bath towels, hand towels, face towels, etc; for hotels, restaurants, airlines, hospitals
Bestexindo Busana Industry, PT	N/A	Product garments
Bhara Induk, PT	100	Trousers
Bhaskara Dahana, PT	N/A	Product garments
Biba Multi Jaya, PT	134	Blouse, T-shirt, Jacket, Pants, Dresses, Skirt
Biem Perkasa Mandiri, PT	41	Hat
Big Fashion Garmentama, PT	535	Pants, sweater, jackets, t-shirt, sweat shirt, night gown under shirt 60,000 DZ PA
Bigtha Tryphena Garmen, PT	675	Specialized in manufacturing childrens wear, baby wear 1,500,000 pcs PA
Bina Busana Internusa, PT	1,135	Working uniform, shirt, hospital uniform
Bina Cipta Warnakarya, PT	N/A	Product garments
Bina Citra Kharisma Lestari, PT	1,500	Men s & Ladies wear, men s shirt, blouse, trouser, skirt, pants, dresses, bottoms, casual jacket
Bina Sandang Internusa, PT	N/A	Ladies dress, ladies graphi with applique
Bintang Adi Busana, PT	1,493	Jacket padded, winter, casual knit

Company Name	Number of Employees	Production Items
Bintang Busana Jaya, PT	985	Jacket 10,000 DZ PA, knitted garment
Bintang Busanamas, PT	34	Trousers, overall
Bintang Citra Garmenindo, PT	300	Sweaters, Sock 15,000 DZ/Y
Biru Sejahtera Garmentama, PT	397	Pants, short denim, short all, overall
Bona Karya Indah, PT	400	Jacket, trouser, shirt, daster, swimsuits
Bongman International	195	Hat 60,000 DZ PA
Borobudur Indah Garment, CV	150	Baby sets, t-shirt, sweater
Boy Dua Bali Makmur, CV	N/A	N/A
Produksi Breien Dan Konfeksi Koperasi	2,400	Sweaters
Britindo, PT	353	Polo shirt: 3000,000/Y, t-shirt: 300,000/Y, fleece tops: 200,000/Y
Buana Fajar Sugih, PT	250	Trousers, shirt, pants, short, skirt, overall
Buana Intisari Garment, PT	N/A	N/A
Buana Kualitasindo, PT	186	Uniform, shirt, blouses, pants, overall, skirt
Budaya Garment, CV	N/A	Product garments
Budi Makmur Jaya Murni, PT	N/A	Jackets
Budi Muaratex, PT	1,200	Trousers, t-shirt, knitted fabrics
Budiartha, CV	250	Blouse, pants, table cloth, men's shirt, jackets, dresses
Bulan Putri Sembada, PT	N/A	Product garments
Bumi Garmentex Jaya, PT	1,371	Blouse, shirt, trouser, jackets, short, pants, vests
Bumi Pusaka Adhi Perkasa, PT	202	Jacket, trouser, shirt, dresses
Bunga Bali Dewata, PT	85	Sarong, dresses, rayon pant, rayon sarong = 180,000 pcs PA
Bunitop Indonesia, PT	102	Knitted fabric
Buntara Multi Industry Corp, Ltd, PT	394	Sweater, T-shirt, Man Shirt, Ladies Blouse
Busana Agung, PT	483	Shirt, trouser denim
Busana Cemerlang Garment Industries, PT	776	Knit wear, sweat shirt, polo shirt, t-shirt, pyjamas, dress, jogging suits, jackets, night gown
Busana Insan Sejahtera, PT	700	Sweater, shirt, cardigan, vest, trousers, jogging suitsets
Busana Karya Sejati, CV	2000	Sweater
Busana Rama Textile & Garment, PT	1,956	Men's woven shirt, ladies blouses, boxer short, shirt, jacket
Busana Remaja Agrapipta, PT	2000	Underwears
Busana Star, PT	237	T-shirt, childrens wear, short, romper, sweat shirt, jogging set
Busana Utama, CV	N/A	Product garments
Busananda Idola Garment, PT	303	T-shirt, sweat shirt, baby sets, sweat shirt
Busanastar (Star Garment Industry, PT)	249	T-shirt, polo shirt, sweatshirt, dress shirt, pyjamas, children & babies wear
Cahaya Indah Surgawi, PT	29	Dress 10,000 pcs PA, bed cover 4,000 pcs PA, Undershirt (singlet) 12,000 pcs PA, blouse 12,300 pcs PA, Jacket 6,000 pcs PA, short 9,200 pcs PA, t-shirt 10,000 pcs PA
Cahyo Nugroho Jati, CV	561	Product garments
Campri Indonesia	591	Jackets 360,000 pcs PA
Canary Jaya Cipta, PT	N/A	Product garments
Caterindo Garment Industry, PT	1,481	Sport wear, t-shirt, polo shirt, knitted glove, knitted wear
Caterindo Glove & Garment, PT	N/A	T-shirt, knitted glove, knitted wear
Cathay Murni Garment, PT	650	Jacket, shirt, pijamas, trousers, jackets
Catrine Natali Pratama, PT	250	Pants, shirt, short, vest's men's, ladies, boy's and girls

Company Name	Number of Employees	Production Items
Catur Karya Mukti, PT	450	Trousers, t-shirt, shirt, sport wear
Catur Kreasi Kridasatija, PT	N/A	Product garments
Cedratex Indah Busana, PT	400	Sweater
Cemara Citra Indogarmindo, PT	450	Dress, blouse, shirt, dress, pants
Cemerlang Pratama, CV	405	T-shirt, jeans, averrall shirt
Cendrateks Indah Busana	400	Sweater 6000 DZ PA
Central Star Knitting Corp, PT	1,250	Sweater, cardigans, sport shirt, training shirt
Centralindo Mode Inter, PT	N/A	Product garments
Chun Ji International, PT	700	Sweater 84,000 DZ PA
Cipta Busana Indah, PT	178	Sweater
Cipta Busana Jaya, PT	N/A	Knit fabrics: 3000,000 kg, t-shirt & polo shirt: 180,000 DZ, underwear: 1,200,000 DZ
Cipta Busana, PT	241	Shirt, pants, jackets, blouse
Cipta Kreasi Mandiri Perkasa, PT	N/A	N/A
Cipta Pola Mandiri, CV	18	Shirt, trousers
Cita Haward Garmino, PT	400	Trousers, dress, pants
Citabahana Intipersada, PT	200	N/A
Citra Abadi Sejati, PT	2,885	Short, jackets, blouse, pants, skirt, dress, vest
Citra Artisa Nusantara, PT	N/A	Children wear
Citra Gaya Busana, PT	110	Pants, blouses, dresses, t-shirt
Citra Nilla Kencana, PT	N/A	Ladies shirt, men s shirt, blouses, trousers, casual jacket, pants, skirt
Citra Raphael International, PT	N/A	Trousers, shirt, underwear, jackets
Citra Selaras Busenindo, PT	N/A	Product garments
Citra Tata Persada Mulia, PT	30	T-shirt, skirt, blouse, overall, short, shirt
Citra Wira Pratama, PT	800	T-shirt, polo shirt, brasieres
Clothing Industry Fijar, PT	30	blouse: 15,000 pc PA, shirt: 20,000 pc PA, t-shirt: 25,000 pc PA, dress: 35,000 pcs PA, pants: 15,000 pcs PA
Cockatoo, Cv	N/A	Menshirt, pants, dress, skirt, blouses, sarong
Concord Benefit Enterprises, PT	1,000	Trousers, short, shirt, pyjamas
Cotexi Inas, PT	N/A	Shirt, trouser
Crownfund Garment Factory Ltd, PT	602	T-shirt, trousers, sweaters, skirt
Dada Indonesia, PT	3,012	Cap: 770,000 DZ, toy: 750,000 DZ
Daese Garmin, PT	1,700	Blazer: 450,000 pc, pant: 480,000 pc, vest: 90,000 pc, skirt: 135,000 pc
Daeyu Indonesia, PT	846	Sweaters
Daihan Texindo Agung, PT	500	Jacket 600,000 pc PA
Danliris, PT	2,500	Men s shirt, blouse, pyjamas, children wear, dresses
Darmasari Int I Cargo, CV	N/A	Product garments
Dasa Busana Sakti, PT	700	Blouse, dress, pants
Dayani Garment Indonesia, PT	1,000	Blanket, short, trousers, pyjamas, bed cover, blankets
Dayanusa I Ciptaraya, PT	411	Jackets
Delami Garment Industries, PT	2,500	Casual pants, pockets, jeans, dress shirts, skirt, polo shirt, knitted towel, beach towel, blanket, giftset, handset, outerwear, trousers, skirt, shirt, polo shirt, jeans
Delta Fashindo, PT	516	Shirt, blouses, childrenwear

Company Name	Number of Employees	Production Items
Detta Marina, PT	1,500	Blouses, shirt, trousers, gown, jackets, underwear, blanket, curtain, prayer mats, baby blankets
Dewhirst Menswear, PT	2,220	Shirt, jacket: 2,500,000 pcs PA
Dhany Hardjo, PT	300	Shirt, blouse, dress, sport wear, ladies pants, romprees, children wear
Dharma Tiga Utama, PT	250	Jackets, vash jackets, pants, shirt, blouses, sweater
Dharma Valmode Textile Industri, PT	300	T-shirt, polo shirt, tank top, trainer top, pyjamas
Diana Express, PT	N/A	Trouser, blouse
Dianatina Ayu, PT	400	Trousers, t-shirt, dress, children wear
Dondon Bali Busana, CV	N/A	Dress: 20,000 pcs/y, pant: 20,000 pcs/y, skirt: 25,000 pcs/y, shirt: 10,000 pcs/y
Dong Ho Puspa	N/A	Jacket, knit shirt
Donna Italian Style, PT	N/A	Trouser, shirt, children s wear
Doosan Cipta Busana Jaya, PT	N/A	Suits, tops
Dragon Phoenix Garments, PT	500	Man s wear, children wear, t-shirt, polo shirt, ladies blouse, trousers
Dua Perintis, PT	N/A	Product garments
Dua Sekawan Respati, PT	350	Shirt, t-shirt, blouses, dress, pants for men and denim pants, trouser & jackets
Duta Buana Garment, CV	185	Trousers, jacket, shirt
Duta Busana Danastri. PT	700	T-shirt, trousers, casual, pants, blazer, jacket, dresses 120,000 DZ PA
Dwi Harni Pratama, PT	85	Batics garment
Dwi Putra Sakti Garment	267	Men s wear, shirt 36,000 DZ PA, trousers jeans 18,000 DZ PA
Dwisukses Utama, PT	1,000	Swester
Dynasty Bali Garment, PT	54	Product garments 3,000 DZ PA
East Nusantara, PT	119	Knit tops
Eka Kencana Cemerlang, PT	N/A	Product garments
Eka Raharja Mulya, PT	N/A	Trouser, jackets, shirt
Ekasandang Duta Prima	N/A	N/A
Ekta Kreasi, PT	150	Men s shirt, short pant, ladies blouse, skirt, jacket
Elis Koleksi, CV	N/A	Gown, blouse, trouser
Elok Indo Bratama Agung, PT	1,550	Underwears 324,000 DZ PA
Eltora Karya Mandiri, PT	500	Sweater 200 DZ PA
Epindo Abadi Jaya, PT	N/A	Jacket, parka, coats, pant for man & ladies
Eratex Djaya Ltd, Tbk, PT	4,800	Dress, short, skirt, trousers
Everindo Suksestama, PT	100	Garment products
Evershine Textile, PT	2,200	Blazer, jacket, coats, short, sweater, sport wear, training pact, t-shirt, travelling bags, jogging sets
Everyoung Utama, PT	756	Jacket, trousers, skirt
Exindo Raya, PT	200	Sweaters, men s shirt, ladies blouses, pants, sweat shirt, polo shirt
Fajar Gemilang Saputra, PT	100	Bed cover
Fajar Surya Bandung, PT	204	Jogging sets, sweat shirt, t-shirt, polo shirt, pants, jackets
Ferinatex Jaya, PT	953	Towel 200,000 pcs PA
Fiesta Adi Tunggal Busana, PT	N/A	T-shirt, dress, trouser
Firma Asatex	300	Bed sheet & sarong
Firma Indonesia	N/A	Shirt 18,000 DZ PA

Company Name	Number of Employees	Production Items
Fit-U Garment, PT	1,354	Men s shirt, ladies blouse, knit wear, t-shirt, polo shirt, babies wear, pants, sleep wear, sweater, sport wear
Flex Indonesia, PT	651	Shirt
Frans Brothers Sejati, PT	1,200	Sport wear, poloshirt, t-shirt, underwear, blouses, sweaters } 300,000 DZ PA
French Indonesia Sweater Industry, PT	200	Sweater
Full Shine Garment, PT	N/A	Children wear = 72,000 DZ set, adult wear = 72,000 DZ
Gabungan Koperasi Batik Indonesia (GKBI), PT	7,000	Batik, blouse, shirt, jeans, dress pants, sweater
Gaibs Indonesia International, PT	810	Ladies blouse 63,000 pcs OA, man casual 3,500 pcs PA, pants 4,500 pcs PA, dress 4,500 pcs PA, childrens wear 86,000 pcs PA } 1,200,000 pcs PA
Gajah Putih, PT	N/A	Pants 20,000 pcs PA, Knit wear 150,000 pcs PA, skirt 30,000 pcs PA, dresses 30,000 pcs PA, shirt 50,000 pcs PA
Galunggung Megasakti, PT	900	Sweaters 120,000 DZ PA
Ganesha Pertiwi Textile Mill	1,032	Sweater, poloshirt
Garmentindo Hadi Manjaya, PT	130	Underwears 100,000 DZ PA
Gaya Indah Kharisma, PT	902	Sportwear 100,000 DZ PA, t-shirt 80,000 DZ PA, poloshirt 200,000 DZ PA
Gemilang Unggul, PT	486	Coats 183,000 pcs PA, women s & children suits 156,000 pcs PA, jacket 240,000 pcs PA
Gemini, CV	150	Trousers, shirt, t-shirt, jackets, pants, blouses, dress
Gen Hut Garmen, PT	100	Trousers
Gerbang Buanaraya, PT	200	Shirt, pants, blouses, dress, skirt, short
Geslo Limited, PT	N/A	Product garments
Gilang Garmino, PT	43	Clothings
Gilang Kreasi Tunggal, PT	35	Blazer, skirt, blouse, pants, vest
Gina, CV	85	Dress 6,250 pcs PA, undershirt (singlet) 2,350 pcs PA, top & pant 5,310 pcs PA, bra 350 pcs PA, blouses 430 pcs PA, sarong 3,450 pcs PA
Ginza Cipta Indah, PT	250	Shirt, dress, trousers, sweater, track suits, blouse
Girindo Garment Indah Industry, PT	502	Skirts, dress, blouse
Gistex Chewon Synthetic, PT	320	N/A
Gistex, PT	3,500	Trousers, shirt, t-shirt
Glory Apparelindo Industry, PT	684	Product garments
Glove Perdana Garment, PT	600	Gloves, shirt, blouse, pyjamas, knit wear, shirt, sweater
Golden Bali Express, PT	N/A	N/A
Golden Castle, PT	1,303	Sport wear, jeans, jackets, t-shirt, poloshirt 150,000 DZ PA
Golden Flower, PT	6,000	Men s dress shirt 7,200 pcs PA, ladies blouse 4,800 pcs PA, sleepwear 600,000 pcs PA, pants tracking short 600,000 pcs PA
Golden Persada Multitex, PT	319	Ladies braissieres, ladies slip, ' ladies panties, ' nitght wear 400,000 DZ PA
Goldindo Menawan, PT	1,500	Braissieres, lingerie 500,000 DZ PA
Grace Inas, PT	N/A	Jeans, jackets, skirt, shirt, trouser, overall
Gracia Indo Garment, PT	200	Sweater, shirt, kidswear 2,600,000 pcs PA
Great Gee s Star, PT	N/A	Product garments

Company Name	Number of Employees	Production Items
Great Golden Star, PT	3,500	Shirt, underwear, trousers, dress, pants, short, top jacjets, rompers, jumpsuits = 250,000 DZ PA
Great Iphock International, PT	400	Suit dress, blouse, t-shirt, shirt = 150,000 DZ PA
Great River International, PT	11,500	Ladies blouse, man s shirt, ladies & Men s underwear, Men s shirt, jeans and casual wear, children s wear, trousers, jackets
Greatindo Multi Sukses, PT	271	Skirts, jackets, short, clothing = 20,000 DZ PA
Griya Inti Mandiri, PT	410	Sweaters 150,000 DZ PA
Griya Tiarani Oetama Indonesia	N/A	Product garments
Gto Indonesia, PT	N/A	T-shirt, underwear, short
Guna Dinamika, PT	300	Sweater 65,000 DZ PA
Gunungputri Indah Garmino, PT	455	Shirt 750,000 DZ PA
Gunze Sock Indonesia, PT	211	Sock 280,000 DZ AP, knitting garment 48,000 DZ
Hae Wae Indonesia, PT	2,477	Jacket, pading jackets, jackets duck down, pading coats
Halonatex, CV	160	Knit wear 4,500,000 DZ PA
Haneka Putra Perdana, PT	120	Shirt 50,000 pcs PA
Hanin Nusa Mulya, PT	4,000	Fashion jacket: jacket, long coats, blouse, dress = 5,000,000 pcs PA
Hanson Industri Utama Tbk (Mayertex Indonesia, PT)	1,500	T-shirt, trousers, blazer, jackets, coats, pullover = 960,000 DZ PA
Hansonesia Intitama, PT	85	Product garments
Harade Maju Sejati, PT	N/A	Product garments
Harberindo Indah, PT	N/A	Product garments
Harfa Rahayu, PT	300	Sweater, sweatshirt, t-shirt, poloshirt, skirt, blouses, pants, knit jacket,= 95,000 DZ PA
Harmatex Perdana, PT	600	Knitwear, poloshirt, sweater, blouses, pants 180,000 DZ PA
Harris, CV	N/A	Trouser, t-shirt, shirt, jacket, blouse, skirt, dress, children fashion, embroidery garment
Harum Jaya Utama Ketapang, PT	50	Shirt, jackets, blouse, pants, shirt, t-shirt, shorts
Hasdia Prima Guna, PT	2,000	Jacket: 60,000 DZ PA, blouse: 60,000 SZ, pant: 60,000 DZ PA, t-shirt: 60,000 DZ, trousers 60,000 DZ PA, jogging suits 60,000 pcs PA
Hatasa Cita Garment Industry, PT	243	Jackets, pants, shirt = 600,000 pcs PA
Heratama Perdana, PT	120	Sweater 99,960 DZ PA
Herendra Putranindo, PT	74	Product garments
Hero Garment Manufacturing, PT	200	Trouser, blouse, shirt, dresses = 25,000 DZ PA
Heshe Indonesia, PT	902	Jeans, shirt, blouse, jackets, dresses, knitwear = 300,000 pdz PA
Hidup Damai Textile, PT	700	Sweater, children wear, jogging shirt, daster, t-shirt, children wear = 2,500,000 pcs PA
Higi (Hirota Indonesia Garment Industry), PT	324	Shirt, pants, ladies wear 57,600
Hing s Subur Makmur Knitting Factory, PT	200	Underwear 1,000,000 DZ PA
Hobby Sentosa, PT	200	T-shirt, polo shirt, childrenwear, ladies wear, blouse, shirt, trouser, blouse
Hogy Indonesia, PT	602	Medical garment 3,500,000 DZ PA
Honey Lady Utama, PT	800	Bra, panty = 450,000 DZ PA, underwear = 400,000 DZ PA
Hoop Year Company Indonesia, PT	652	Trousers, shirt, short, blouses, children wear 85,000 DZ PA
Horison Synthetic, PT	N/A	Product garments
Hossana Garmentama, PT	460	Polo shirt = 300,000 DZ PA

Company Name	Number of Employees	Production Items
Hotama Karya Indonesia, PT	500	Sweater, skirt, jackets } 170,000 DZ PA
How Are You Indonesia, PT	1,300	T-shirt 30,000 DZ PA, Sweatshirt 30,000 DZ PA, trousers 30,000 DZ PA, jackets 30,000 DZ PA
Hyun Indonesia Garment, PT	N/A	N/A
Icimenta, PT	371	Sweaters 55,000 DZ PA, jackets 60,000 DZ PA
Idea Gatara, PT	N/A	Product garments
Idola Bangun Idea, PT	500	Sport wear, ladies blouse, men s shirt, pants, short, jackets, t-shirt 175,000 DZ PA
Il Jin Sun Garment, PT	3,092	Men s & ladies suit, coat, jackets, blazer, blouses, pants = 1,750,000 pcs PA
Imogiri, PT	N/A	Sweater
Indah Lagoina Sahara, PT	28	Pants
Indah Lonindo Jaya Sepakat, PT	150	Stocking 350,000 DZ PA, sock 384,000 DZ PA
Indah Subur Sejati, PT	100	Shirt 17,000 DZ PA
Indahsana, PT	N/A	Product garments
Indobell Garmentama, PT	310	Uniform, skirt, blouse, oneplace, slack, skirt, jackets, apron } 35,000 DZ PA
Indoraya Tradecpnusa, PT	N/A	Product garments
Indotex Jaya	40	Clothings
Indothai Widya, PT	N/A	T-shirt, pants, skirt, dress
Indoyong Tex Jaya, PT	856	Product garments
Indrajaya, CV	180	Jackets, dress, blouse, pants, t-shirt, trousers 15,000 DZ PA
Inkosindo Sukses, PT	1,298	(Ladies & men s garments) knit tops 2,400,000 pcs PA, bottom top 600,000 pcs PA, active wear 600,000 pcs PA
Inspiran Aditama, PT	433	Trousers, clothing 720,000 DZ PA
Intai Rainbow Collection, CV	30	Product garments
Intan Fashion, CV	50	T-shirt, manshirt, dress, shortpant, top, shirt 70,000 DZ PA
Intercont, PT	N/A	Product garments
Intersamudra Eximindo, PT	N/A	Product garments
Inti Konpeksi, PT	N/A	Shirt, short, blouse, romper, trousers } 60,000 DZ PA
Inti Pratama Busana, PT	708	Clothings
Inti Sukses Garmino, PT	1,000	Bloyse, dress 1,800,000 pcs PA
Intigarmindo Persada, PT	557	Trousers, shorts, shirts, jeans 720,000 pc, jackets: 30,000 pc
Intranikka Raya, PT	700	Sweater 150,000 DZ PA
Intratex Aneka Industri, PT	350	Sweater, jackets, t-shirt, pants, jogging suits, poloshirt} 400,000 DZ PA
Invecto Nusantara, PT	337	Velvet & beludru (sajadah) 600,000 mtrs PA
Iwama Prima Textile Mills, PT	1,101	Towel, handkerchief, door mat } 670,000 DZ PA
Jaba Garmino II, PT	520	Poloshirt, t-shirt, trousers, dress, skirt, pyjamas, jogging suits, sweaters, 360,000 DZ PA
Jabatex, PT	2,900	T-shirt, shirt, blouse, knitwear, top, jogging suits, rugby shirt, sweat shirt } 300,000 DZ PA
Jackie Indah Garment, PT	N/A	Product garments
Jacolintex, PT	703	Shirt 10,832 DZ PA, trousers 81,519 DZ PA, blouse 17,417 DZ PA, child cloth 10,578 DZ PA, gown, rok, jacket
Jaka, CV	123	Dress, pants, skirt, blouse, ect: 100,000 pc

Company Name	Number of Employees	Production Items
Januar Bulan Pertama, PT	150	Jacket mahasiswa: 6500 pcs PA, toga wisuda: 5700 pcs PA, rompi savety life: 10,000 pcs PA, shirt 5000 pcs PA
Jaya Asri Garmino, PT	102	Product garments 500,000 DZ PA
Jehnsen, CV	300	T-shirt, skirt, dress, trousers } 450,000 pcs PA
Jersey Indonesia Garment, PT	1,500	T-shirt, closet, polo shirt, sweat shirt, nogh gown, jogging set } 95,000 DZ PA, sweaters 225,000 DZ PA
Jia Trading Industries, CV	N/A	Dress, tops, pants : 325,000 pc
Jimmy Garment, CV	437	Dress, tops, pants, t-shirt, long trousers, blouse, dress, pant, top } 70,500 DZ PA
Josanhokindo Sentragarment, PT	200	Ladies blouse 30,000 DZ PA
Juliet Sisters, PT	N/A	Product garments
Kahatex, PT	2,450	Blaze, jackets, coats, shorts, t-shirts, sweater, sport wear, trainning packs, t-shirt, sweaters } 230,000 DZ PA, sock 6,000,000 DZ PA
Kaji Sangyo Indonesia, PT	378	Jackets, rain wear, sport wear
Kaleidoskop, PT	N/A	Product garments
Kaltimex Apparel Unggul, PT	705	Ladies suit 114,136 set PA, ladies blazer 237,765 pcs PA, ladies skirt 84,347 pcs PA, ladies jackets 27,793 pcs PA, ladies coats 31,746 pcs PA, vets 5,406 pcs PA, pants 14,899 pcs PA, ladies dress 24,701 pcs PA, trousers 1,000 pcs PA, blouse
Karina Tata Busana, PT	400	Blouse, overall, pants, vets, shirt, skirt, trouser } 48,000 DZ PA
Karma, CV	N/A	Product garments
Karry Koleksi, CV	65	Dress, pant, shirt, top, skirt
Karta Ajies Garment, PT	N/A	Jeans, pants, short, overall
Kartini Garment, PT	73	Jackets, skirts, trousers, children wear, jeans
Karwell Indonesia, PT	15,000	Jeans, children wear, skirt, knitwear, ladies blouse, ladies skirt, jackets, t-shirt, nighwear } 300,000 DZ PA
Karya Acindo, CV	20	Jeans
Karya Nyata Kurnia, PT	N/A	Product garments
Kawan Kita Sejahtera, PT	813	Jackets, baby overall, jogging suits } 100,000 DZ PA
Kawasindo Tunggal Perkasa, PT	N/A	Long pants: 8,000 DZ, jackets: 7,500 DZ
Kecak, CV	500	Dresses, top, pants, blouses, jackets } 152,000 DZ PA
Kelud, PT	N/A	Product garments
Kemajuan II	290	Children wears
Ken Lee Indonesia, PT	1,031	Wedding gown, bridesmansides 10,000 DZ PA
Kerobokan Indah, PT	N/A	Shirt, t-shirt, women wear
Keryson Jaya Sukma	N/A	Shirt: 5,500 DZ PA, pant:3,000 DZ, vet: 2,500 DZ, dress: 4,000 DZ
Khrisna Kreasi, PT	N/A	Shirts, blouses
Kido Jaya, PT	900	Rainwear, sportwear, raincoats, leather jackets } 520,000 DZ PA
Kizone International, PT	800	Swim wear, pants, baby wear, t-shirt, capry legging, fitness suit, pants 700,000 DZ PA
Kolon Langgeng, PT	1,000	Jacket/coat: 480,000 pcs
Konfeksi "Aneka"	N/A	Product garments
Korin Adijaya Apparel, PT	688	Jackets, jogging suit & jackets
Korin Garmentama, PT	2,556	Ladies garment, wool jacket, coat, blazer, sets, trousers, blouses, skirts, vest
Korintex, PT	N/A	Product garments

Company Name	Number of Employees	Production Items
Kreasi Bahan Indah, PT	517	Shirt, t-shirt, trouser, blouse, short wear
Kuchit, CV	50	Dresses, pants 120,000 pcs PA
Kuk Dong Internatioanl, PT	1,500	Product garments
Kurnia Astasurya, PT	1,000	T-shirt, skirts, blouses, trousers 1,000,000 DZ PA
Kurnia, CV	N/A	Product garments
Kurnia Eksa Ganda, PT	N/A	Clothing: 120,000 pcs/Y
Kuskus Collections, CV	100	Dress 40,000 pcs PA, pant 12,150 pcs PA, Skirt 8,000 pcs PA, jacket 5,000 pcs PA, shirt 20,000 pcs PA, jumpsuits 850 pcs PA, vest 1,000 pcs PA
Kuta Bali, CV	50	Pants, short, t-shirt, top, dress, skirt
La Chidehafu, CV	69	Product garments & leather accessories
Lamretta, PT	N/A	Men s & Ladies wear
La fiz Firlyra Garment CV	N/A	Children s wear
Leading Garment Industries, PT	3,880	Nighwear, underwear 2,600,000 DZ PA, bed sheets 600,000 sets PA
Lembanindo Tirta Anugrah, PT	326	Baby shoes, carry nest, baby carries, gedongan samping, bag, pillow, baby shoes
Lentera Pertiwi, PT	122	Sweater 25,000 DZ PA
Lestari Busana Anggun Mahkota, PT	837	Jackets 720,000 pcs PA
Lestari, CV	34	Dress nylon lycra 10,466 pcs PA, skirt 4,100 pcs PA t-shirt 3,400 pcs PA, top 1,300 pcs PA, pant 500 pcs PA, jacket 200 pcs PA
Lestari Dini Tunggal, PT	200	Uniform, overall, linen product, product, clothing 63,750 DZ PA
Lestari Garment, CV	50	Blous, t-shirt, shirt, dress, tops, pants, jumpsuit, short, etc: 120,000 pcs PA
Lestari Santika Garment, PT	1,006	Sweat shirts 36,000 DZ PA, shirts 36,000 DZ PA, underwear 54,000 DZ PA, pants 54,000 DZ PA
Levi Strauss Indonesia	400	Jackets, shirt, pants 85,000 DZ PA
Lewiguna Anugrah, PT	23	Product garments
Lia Garments Industry, CV	50	Menshirt: 15,000 pc PA, dress: 60,000 pc PA, jacket: 6,000 pc PA, pant: 45,000 pc PA, pyjama/night wear: 60,000 pc PA, skirt: 12,500 pc PA
Libra Star Jaya, PT	N/A	Men s & ladies blouse, skirt, blazers, pants
Lieka Alfatama, PT	N/A	Ulos
Lieka Busanaraga, PT	1,182	T-shirt, sport wears, swimming wear, ladies wear, children wear, stocking } 500,000 DZ PA
Lily Bali, CV	15	Product garments
Lily Garment, CV	202	Product garments
Liza Christina, PT	322	Childrens wear 30,000 DZ PA
Madesi Tama, PT	35	Dress, jackets, skirt, men shirt, pants from cotton & rayon, short pants 3,500 pcs PA, long pant 3,500 pcs PA, men shirt 7,000 pcs PA, skirt 4,500 pcs PA
Mahanta Express PT	50	Product garments
Mahasuri Utama, PT	400	Shirts, dresses, blouse, jackets, skirt, blazer, jogging suits, vest, casual short 7,500 DZ PA
Maimoon, CV	400	All types of ladies outerwear, blouse, vest, skirt, short, pant, jumpsuit, dresses, men s shirt, shorts of cotton woven prints, rayon crinkle prints and polyster prints/cotton/rayon woven, etc } 38,000 DZ PA
Maju Mars Abadi, PT	150	Knitting garments (socks) 150,000 DZ PA

Company Name	Number of Employees	Production Items
Makmur Integarindo, PT	250	Children: mens & ladies wear 80,000 DZ PA
Mama & Leon, CV	400	Dresses, blouses, t-shirt, jackets, pants 35,000 DZ PA
Mangul Tua Garment, PT	N/A	Jackets, trouser, shirt
Manson Sbastian Co, PT	N/A	Product garments
Mantap Garmen, PT	N/A	Product garments
Marga Busanamas Agraguna, PT	N/A	Product garments
Mars Gain Madya, PT	504	Jackets
Mars Gain Utama, PT	300	Jackets, trousers 120,000 pcs PA
Martana, CV	N/A	Product garments
Martika Dewitama, PT	N/A	Product garments
Mascotindo Jaya Abadi, PT	571	Ladies wears, blouses, men & shirts, childrens wears 100,000 DZ PA
Master Indo Jaya Abadi, PT	1,201	Blouses, pants, skirts, dresses, jackets, trousers 120,000 DZ PA
Mataram Tunggal Garment, PT	450	Shirt, trousers, t-shirt, blouses 3,000,000 pcs PA
Matra Primangarindo, PT	N/A	Jackets, jogging suit, coats
Matrisae Collectindo, PT	250	T-shirt, blouse, pants, dresses, casual 600,000 pcs PA
Maya Fortuna Jaya, PT	222	Pant: 15,000 DZ, dress: 15,000 DZ, shirt: 15,000 DZ, t-shirt: 10,000 DZ, sarong:35,000 DZ
Mayer Crocodile Indonesia, PT	711	Sweater, men & shirts, trousers, jean jackets, jean pants, shirt, brassieres, men & brif } 300,000 DZ PA
Medika Apparelindo, PT	231	Hospital uniform 480,000 pcs PA, maternity belt 60,000 pcs PA
Mentari Karya Dewata, CV	74	Women & dress 42,000 pcs PA, women & top 12,000 pcs PA, women & pants 12,000 pcs PA, women & skirt 12,000 pcs PA, jumpers 10,000 pcs PA
Merak Agung Ayu Abadi, PT	180	Casual shirts, short, pants 75,000 DZ PA
Mercu Prima Sentosa Textile Factory, PT	1,202	Shirts, jogging suits, pants, short, skirts, pyjamas } 200,000 DPZN PA
Mermaid Textile Industry (MERTEX), PT	1,200	Shirt, trousers, etc } 240,000 DZ PA
Merta Jaya, CV	150	Ladies casual wear, evening wears, men & casual wear, blouses, shirts, dresses, jackets } 440,000 DZ PA
Metro Corp Indonesia Factory, PT	N/A	Trousers, mens shirt, dress, nighwear, ladies shirt, children wear, blouses
Metro Corp Indonusa	2,004	Trousers, shirts, dresses, nighwears, blouses, childrenwear } 180,000 DZ PA
Metro Corp Sudirman Factory Indonesia, PT	850	Blouse, shirt
Metro Garmin, PT	2,802	Shirt, knit, blouses, mens & ladies pants, coats, vests, blazers, suits, dresses, ladies shirt, children wear, t-shirt, nighwear, jackets
Mettatex, PT	N/A	Product garments
Micky Collection, CV	N/A	Product garments
Mikiko Garmenindo Industry, PT	N/A	Clothing: 77,089 pcs
Mimi Kids Garmindo, PT	500	Babies/children wears, teenage, t-shirt, polo shirt, dresses, jogging sets, sweatshirt, jumper, blouse, children wear } 960,000 pcs PA
Mimi Love, PT	166	Clothings
Mimi & Collection, CV	N/A	Dress, top, skirt, men & shirt, t-shirt
Minner Sabur, PT	250	Pants, jackets, shirt, skirt, blouses, jeans, children wears } 750,000 DZ PA
Mister Kuta, CV	N/A	Product garments
Mita Enterprise, CV	150	Clothings

Company Name	Number of Employees	Production Items
Mitra Busana Apparelindo, PT	1,263	MBA uniform, skala uniform, factual industrial uniform, poloshirt, pyjama, joggingset, baby wear, ladies wear
Mitra Garment Baliraya, PT	N/A	Fabrics & denim: 750,000 yard/month
Mitra Usaha Abadi, CV	350	Jackets, pants, pc hirt, t-shirt, skirts } 4,000,000 pcs PA
Mitragarment Indoraya, PT	754	Rayon blouses, rayon skirt, calton dress, shirt, pants 180,000 pcs PA
Modes Cendana, CV	100	Tops, blouses, dresses, t-shirt 60,000 pca PA
Moli Karya Sakti, PT	861	Ski/snowbord, 1,000,000 prs/th, fleece gloves 1,000,000 prs/th, golf gloves 1,000,000 prs/th, hats, head band 500,000 prs/th
Mondialindo Perdana, PT	600	Sweater, ladies wear, children wear, man wear } 36,000 DZ PA
Moondi, CV	200	Mans shirt, ladies shirt, pant, long pant, jacket, jumpsuit, dess, top, vest, sarong, etc } 25,000 DZ PA
Morich Indo Fashion, PT	1,000	Jackets, coatoverall, nighwears 960,000 pcs PA, sarung TR 50,000 codi PA
Muara Krakatau, PT	2,000	Jackets, skirts, overall, shirt, pants, dress, pyjama, sport wear, etc 100,000 DZ PA
Mulia Knitting Factory, PT	1,670	Underwears for mens, polo shirts, t-shirt, brief 700,000 DZ PA
Mulia Lestari, PT	437	T-shirt, sweatshirt, night gown, dresses, blouses, pyjamas, joggingsuits, poloshirt, children wear & others knit wear
Multi Eagle Garment, PT	N/A	Shirt, bridal gown: 170,000 DZ
Multi Garmenjaya, PT	3,892	Cotton trousers, denim trousers, formal trousers, rompers, jackets, vest, pants, trousers, jeans wear, skirt, pants, romppper
Multi Karya Abadi, CV	N/A	Product garments
Multilitan Indotrend, PT	N/A	Shirt, ladies blouse, short
Mulya Avitex, CV	93	Jas almamater 30,000 pcs PA, wearpack 20,000 pcs PA, pdh 15,000 pcs PA, pdl 10,000 pcs PA
Mustika, CV	N/A	Skirt/pant: 45,000 pc, blouse/shirt: 35,000 pc, dress/gown: 15,000 pc, sport wear/t-shirt: 30,000 pc, jacket/waitcoat: 10,000 pc, knitwear: 10,000 pc
Mwm Garment, PT	N/A	Product garments
Naga Mas, CV	178	Sweater
Namnam Fashion Industries, PT	1,141	Ladies braissieres, gridles } 6,000,000 pcs PA, underwear 600,000 DZ PA
Narawata Makmur, PT	150	T-shirt 48,000 DZ PA
Narida Utama, PT	N/A	Product garments
Narisa, PT	N/A	Product garments
Natatex Prima Corp, PT	1,141	Trouserss, t-shirt, blouses } 600,000 pcs PA
Nino, CV	150	Tops, dress, shirts, shorts, skirts, pants, blouses, jumpsuits, jackets } 41,500 DZ PA
Nominasi Chandra Utama, CV	N/A	T-shirt, skirt, short, night shirt brief, babieswear, pants, weatshirt, dress
Northbay Garment International, PT	460	Jackets, trainning suit
Nova Ayu Lestari, PT	300	Product garments
Nova Fashion Garment Mfg, PT	390	Blouse
Nowl Knitting Indonesia, PT	305	Knitwears, sweaters 50,000 DZ PA
Nurma Indah, PT	100	Trousers, polo, sweatshirt, sweater, blouse, jackets, short

Company Name	Number of Employees	Production Items
Nusantara Cemerlang, PT	500	Trousers, shirt, men's slack, short, apron, ladies pants, dresses, nightwear, jacket, ladies dress, jogging set, sweatshirt, ladies set, boy singlet, t-shirt, pyjamas, 100% cotton towel, 100% rayon challi print, towel, blanket, woven fabric, knitted fabric
Obor Prima Sempurna Garment, PT	N/A	Product garments
Octa Putrajaya, PT	550	Product garments
Ogivano Garment Industries, CV	300	Sweaters 48,000 DZ PA, sock 70,000 DZ PA
Orient Garment, PT	238	Sweaters 32,000 DZ PA
Pabrik Kaos "ASELI", PT	255	Men's wear, t-shirt 144,000 DZ PA
Pabrik Tekstil Kasrie, PT	776	N/A
Pacific Express, PT	N/A	Batik garment, casual
Palm, CV	100	Gown, trouser, ladies skirt, dresses, pants 480,000
Pan Brotherstex, PT	5,200	Polo shirt 1,420,000 pcs PA
Pan Rama Vista Garment, PT	400	Casual, tops, dress, blouse, skirt, shirt } 100,000 DZ PA
Panaco Mandiri, PT	N/A	Product garments
Panca Brothers Soemitro, PT	1,053	Product garments
Pancabusana Asrilaras, PT	296	Trousers, shirt 200,000 DZ PA
Pancadharna Centrabhakti, PT	460	Trouser: 75,000 DZ PA, dress: 200 DZ PA, men shirt 15,000 DZ PA, t-shirt 23,000 DZ PA, vest 800 DZ PA, children wear: 1,200 DZ PA, sock: 30,000 DZ PA, jacket 800 DZ PA
Pancamitra Ichigojaya, PT	300	Babies wear & children wear: 180,000 DZ (vest, panties, long pants, suit, rompers, jumpers, joggingsuit, pyjamas, nighties, dress, blouse, t-shirt, babydoll, singlet, short, brief, bib, mittens, bottles, hat
Pancaran Harapan Nusa, PT	N/A	N/A
Pangestu Collection, CV	N/A	Product garments
Panji Danan Jaya, PT	209	Men's & boy shirts, ladies shirts, t-shirts, pants, skirts, dress } 210,000 pcs PA
Paradita Irota Garment, PT	N/A	Shirt, dress, jacket, trouser, pant
Paramitha Mulya, CV	N/A	T-shirt batik, training packs, etc
Pasatama Mikarindo, PT	508	Pants, jackets 4,500 DZ PA
Pastika Abadi, PT	369	Jackets
Peony Blanket Industry Ind, PT	2,500	Sweaters 200,000 DZ PA, bed cover 1,500,000 pcs PA, trousers 13,000 DZ PA, jackets 10,000 DZ PA
Perdana Firsta Garment, PT	576	Ladies knit tops & rayon, t-shirt, pants, underwear, trousers 91,000 DZ PA
Pertenunan Djarum Terbang, PT	103	Sarong 18,000 codi PA
Pipi Koleksi, CV	100	Shirts, trousers 47,700 DZ PA
Pismatex Textile Industry, PT	4,000	Sarong 14,800,000 pcs per month
Poetra Soeloeng, PT	N/A	Product garments
Pola Prinus Pratama	N/A	Product garments
Poong Il Jaya, PT	700	Jackets 65,000 DZ PA, leather jackets 6,600 DZ PA, duck down jackets 12,500 DZ PA
Prefash Wear Cemerlang, PT	2,000	Pants 100,000 DZ PA, jackets/coat 40,000 DZ PA, shirts 100,000 DZ PA, skirt
Prima Archiflora, CV	N/A	Product garments
Prima Busana Nusantara, PT	N/A	Product garments
Primer Koperasi Sesko Abri, PT	N/A	Sweater

Company Name	Number of Employees	Production Items
Primetex Excellencia, PT	N/A	Ladies blouse, sweater, t-shirt, men s shirt
Princess Muniroh, CV	N/A	Product garments
Prodomo, PT	500	Product garments
Progetti Indonesia, PT	N/A	Knitwear, pant, skirts, dresses, shirt
Pusat Koperasi Pondok Pesantren	41	Sweat shirt, pants, ladies blouse
Puskopontren	40	Jeanswear, shirt, jackets 3,000 DZ PA
Putri Sekar Kencana, PT	N/A	Jacket/blouse
Qualitexindo Busana Industry, PT	N/A	Gown, shirt
Raiment, PT	396	Blouse, vest, skirt, dress, pantsuit, short all sets, etc: 30,500 DZ PA
Rajabrana, PT	5,773	Sweaters 139,672 DZ PA, bags 20,000 DZ PA
Rama Cipta Busana, PT	100	Blouse, casual shirt 12,000 DZ PA
Ramahita Mangula Garment, PT	N/A	Dress, pants, skirt
Ramayana, CV	N/A	Shirt, blouse
Rana Sankara, PT	200	Pants, jackets, skirt
Rapico Busana Permata Indah, PT	738	Short sleeve, shirt, swim trunk, short sleeve, shirt, short all sets, bipuse, babywear, sleepwear, top pant sets
Rehabothe Design Centre, PT	550	Shirt: 40,000 DZ, pant: 48,000 DZ, trousers, jackets, t-shirt
Ria Garment	70	Pants, shirt, blouse, uniform 156,000 pcs PA
Rikha, CV	41	Product garments
Rismar Daewoo Apparel, PT	5,265	Sleep wear, skirt, blouse, jackets, pijamas, etc 922,800 DZ PA
Riyadi, CV	100	Bed linen, bocer pant, pyjama, ladies apparel, apron, hortpant, shirt 36,000 pcs PA
Rocomoro, PT	85	Pants, blouse, dress
Rodeo, PT	300	T-shirt, trousers, underwears 125,000 DZ PA
Rokino Raya Sweater, PT	520	Sweaters 450,000 DZ PA
Roma Cargo, CV	N/A	Product garments
Ronal Interbuana, PT	N/A	Shirt, underwear, blouse, jackets
Ronia Milusagarment, PT	N/A	Bed cover, banket, shirt, jackets
Rostikana Jaya, PT	30	Sweater, pant, trousers, man & ladies wear, blouse, pyjamas 12,000 DZ PA
Rukun Bina Maju, PT	700	Sweaters, dress, skirts 180,000 DZ PA
Rukun Hidup Barutama, PT	426	Sport wears, pant, t-shirt, bag 430,000 DZ PA
Sabar Santosa, PT	N/A	Acrylic yarn, jacket training packs, t-shirt, travelling bags, sweater, woven fabric, knitted fabric, footwears, denims, cotton fabric
Sahid Detolin Textile (SADETEX)	700	Hand towels, damasck, bath towel, pool towel, face towel, bath mat, beed sheets, bed covers
Saimoda Garmino, PT	452	Skirts, trousers, ladies dresses } 95,000 DZ PA
Sainath Industrial Corp Ltd, PT	N/A	Yarn for weaving 100 pct (cotton yarn) : 39,400 bale PA
Saka Perfecta, PT	N/A	Product garments
Sakhuntala Knitting Industry, PT	250	Shirts, blouses, dresses 100,000 DZ PA
Sakura Sarana Putra, PT	110	Sarong 15,000 codi PA
Sambo Indonusa, PT	837	Skirts, pant, blouse
Sami Jaya	80	Trousers, jacket
Samstar, PT	1,304	Jackets, jogging sets 50,000 DZ PA

Company Name	Number of Employees	Production Items
Samudera, CV	N/A	Dress, skirt, jacket, pant, man shirt, blouse, top, sarong etc
Sandang Indah Gemilang, PT	558	Container bag: 720,000 pcs
Sandang Maju Perkasa, PT	802	Shirt, t-shirt 100,000 DZ PA
Sandratex, PT	3,022	Shirt, blouses, jeans } 500,000 DZ PA
Sangkakala Niaga Mas, PT	14	Shirt, trousers
Sansan Saudaratex Jaya, PT	3,800	Product garments 300,000 DZ
Santha Buana Bali, PT	75	Batik garment: 48,000 pc
Santhi, Cv	190	Shirt ladies wear embroidery lace work, shirts, dresses, blouses, pants, trousers 63,000 DZ PA
Sanur Expo, CV	N/A	Shirt
Saraburda Mas, PT	250	Jackets, blouses, trousers, skirt, pants, dress, top, shirt, blouse, children wear } 120,000 DZ PA
Sarah Industries, CV	140	Pants, shirts, blouses } 98,000 DZ PA
Sarasa Mitratama, PT	2,500	Shirt, blouse, trousers, polo shirt, children wear 300,000 DZ PA
Sarasa Nugraha Tbk, PT	2,017	Blouse, pant, skirt, dress, shirt, short, men s wear } 450,000 DZ PA
Sari Busana Riatex. PT	N/A	Shirt, blouse, textiles
Satya, CV	60	T-shirt, skirt, dress 25,000 pcs PA
Seantero Gumilang Lestari, PT	400	Sweater, polo shirt, t-shirt, pyjamas, baby sets 36,000 DZ PA
Segoro Fiberindo Mulyo, PT	600	Gloves
Sekar Busana Cemerlang, PT	N/A	Product garments
Selaras Indosejati, PT	N/A	T-shirt, long dress, short dress, skirt, long pants, short pants, jacket, jumpsuit = 72,000 pc
Selaras Kausa Busana, PT	858	T-shirt, polo shirt: 1,560,000 pcs
Senjaya Sugihmas Utama, PT	40	Pants, shirt, children wear, ladies wear
Sentoso Johans Evenlysttin, PT	738	Sweaters 100% cotton 34,092 DZ PA
Sentraco Garmino, PT	978	Sweaters 240,000 pcs PA
Senya Permana Garment, PT	244	Jackets, jogging suit, vest, jackets
Serasi Adi Busana, PT	625	Blouse, skirts, dress, pants 460,000 DZ PA
Serasi Busanindo Nusa, PT	N/A	Product garments
Serica Indah, PT	N/A	Product garments
Setia Pratama Sentosa, PT	N/A	Product garments
Setya Permana Garment, PT	260	Jacket, pant, shirt, sweater 300,000 pcs PA
Shaka Hasta, PT	N/A	T-shirt, polo shirt
Shakuntala Knitting Industries, PT	607	T-shirt, blouses, dresses } 100,000 DZ PA
Shinetama Interfashion, PT	1,876	Sweater, jackets, t-shirt, jogging sets: 150,000 DZ PA
Shinko Toyobo Gistex Garment, PT	853	T-shirt, shirt, knitwears } 180,000 DZ PA
Shinta Budharani Industries, PT	688	Casual & tops
Shinta Pratiwi Dinamika, PT	N/A	Product garments
Shinwon Ebenezer, PT	1,800	Sweaters 300,000 DZ PA, handbags 600,000 DZ PA
Siana, CV	N/A	Trouser, gown, underwear, jacket
Sidikara Karti Hasta Garment, PT	122	Product garment 72,000 pcs PA
Silkvan Jaya Kurnia, PT	101	Children wear
Sin Cheau Garment Indonesia, PT	750	Short, jeans, overall, skirt, clothing
Sinar Apparel International, PT	982	Clothings
Sinar Bandung, PT	450	Product garments

Company Name	Number of Employees	Production Items
Sinar Barugita Gemilang, PT	200	All knit man, ladies, children, babies knits wear: childrens wear, t-shirt, sweat shirt, nigh gowns, children wear, baby sets, t-shirt, baby playsuit, jogging suits 756,000 pcs PA
Sinar Bintang Abadi, PT	N/A	Shirt, blouses, trousers, children apparels, rompers
Sinar Fajar Galang Raya, PT	N/A	Product garments
Sinar Gaya Busana, PT	1,147	Trousers, jackets 650,000 pcs PA
Sinar Orient Garment, PT	800	Jackets, jogging suits 21,000,000 pcs PA
Sinar Osternadi, PT	N/A	Product garments
Sinu Inggal Mutu, PT	N/A	Product garments
Soneta Garment, PT	100	Underwears 240,000 pcs PA
Soyang Indah Jaya, PT	150	Sweater 600,000 pcs PA
Spring Star Djaja, PT	1,400	Short, classic pants 60,000 DZ PA
Sri Rejeki Isman (SRITEX), PT	12,000	Dress, trousers, shirts, t-shirts, children wears 1,432,000 DZ PA
Srikandi, CV	100	Man shirt, blouse, top pant short & long pant, dresses, blouses
Srimas Indah, PT	N/A	Product garments
Standard Smart Fact, PT	N/A	Product garments
Standard Stamping Work, PT	250	Denim, jeans, short 36,000 DZ
Star Camtex, PT	N/A	Denim: 6,600,000 mtr
Starindo, CV	N/A	Product garments
Starnesia Garment, CV	1,526	Coat/jacket: 360,000 pcs PA, woven outwear 840,000 pcs PA
Suburindo Manunggal, PT	390	Romper, trouser, jackets, shirt, shirt
Suchrisna Prama Garment, PT	N/A	Product garments
Sukwang Indonesia, PT	1,400	Jackets, dresses, trousers 55,000 DZ PA, coats, rompers 70,000 DZ PA
Sumber Bintang Rejeki (SUMBIRI), PT	2,200	Lady underwear (bran & panty) = 15,000,000 pcs PA
Sumber Jaya Garment, PT	200	Knitwears 180,000 DZ PA, batik garment, t-shirt, polo shirt, tank top 60,000 DZ PA
Sumber Lematang, PT	N/A	Product garments
Sungintex, PT	1,643	Jackets, pants, bodywarmer, vest, trousers, outwear, ladies shirts } 2,500,000 pcs PA
Superbest Busana Industry, PT	N/A	Product garments
Superior Garmentama, PT	500	Parka, jackets, pants, sweat shirt, parka
Surya Agung Knitting, PT	100	Sweaters 46,000 DZ PA
Surya Bali Company, CV	N/A	T-shirt, blouses, skirts, vest 5,000 DZ PA
Surya Busana Nusa Tunggal, PT	N/A	Trouser, jeans, children wear: 600,000 DZ , shirt
Surya Dadari, PT	1,303	Product garments
Surya Indah Cemerlang, PT	992	Finishing fabrics: 24,000,000 yd/year
Surya Indah Garmindo, PT	750	Blouses, shirts 100,000 DZ PA
Surya Mas Wisata, CV	60	Product garments
Suryamandiri Tekstil Buana, PT	457	Shirt
Swabuana Cipta, PT	377	Shirt, blouses, t-shirt 19,000 } DZ PA
Swadaya Jaya Nusa Sentosa, PT	N/A	Product garments
Swajaya Sentosa Abadi, PT	200	Children wears
Syailendra Perkasa Garment, PT	N/A	Tops
Sybra Sira, PT	N/A	Product garments

Company Name	Number of Employees	Production Items
Tuntex Garment Indonesia, PT	N/A	Trouser, sport wear, jacket, blouse
Tainan Enterprises Indonesia, PT	708	Blouse, jumper, shirt, dress, vest, overall, trousers, blouse, pant } 75,000 DZ PA
Tatto Rama Garment, PT	220	Blouse, dress, blazer, ladies pant, skirt
Tempa Bersama, PT	N/A	Product garments
Terminal Gaya Busana, PT	N/A	Product garments
Texindo Putrajaya, PT	150	Clothings
Thea Mahakam, PT	N/A	Product garments
Tiga Mulia Mas Jaya, PT	663	Shorts, trousers, jackets
Tini & Collection Bali	N/A	Printing for katun, rayon, tc, fujite: 7,000,000 yards/month
Tirta Muara Tama, PT	42	Trousers, overall
Tjiriadharma, PT	N/A	Shirt, sarong, ladis wear, yarn
Tobal, CV	150	Children wear, long dress
Tomorrow & Antiques Indonesia, PT	36	Product garments
Tonaza, CV	100	Product garments 12,000 DZ
Tonikitex Mfg Corp. PT	271	Towels 1,400,000 DZ PA
Tony Konveksi, CV	N/A	Product garments
Top Man, PT	200	T-shirt, childrens wear, polo shirt
Tri Goldenstar Wisesa Industries, PT	1,832	Jogging sets& sport wear 180,000 DZ PA, pants 120,000 DZ PA
Winner Garment, PT	2,500	Jeans, trousers, shirt, t-shirt, jackets
Winner Synthetic Textile, PT	1,000	Brassieres, underwears, wimmingwears, dusters
Winwin Garment, PT	650	Knitwears, children wear, jacket, t-shirt, poloshirt, etc 15,000 DZ PA
Wiplan Indomakmur, PT	N/A	Product garments
Wira &, CV	N/A	Dress, t-shirt
Wisma Batik "Margaria"	N/A	Product garments
Won Woo Indonesia, PT	899	Jackets, coats, pants, vest } 6,000 DZ/month
Wujud Nawang Wulan, PT	300	Ladies underwears
Yaluhira Perkasa	N/A	Product garments
Yann & Clement, CV	20	Product garments
Yasa Bali Niaga, CV	30	Product garments
Yeon Heung Mega Sari, PT	N/A	Product garments
Yosindotama Cemerlang, PT	689	Shirt, romper, shortall, skirt, jumper, pants
Yuditya Mitra Usaha, PT	300	Blazer, pants, blouse, shirt, dress
Yunitex, PT	800	Product garments

APPENDIX 3: GARMENT VALUE CHAIN OVERVIEW

