



Ministry of Agriculture



Review on Potential Bilateral Trade on Agricultural Products

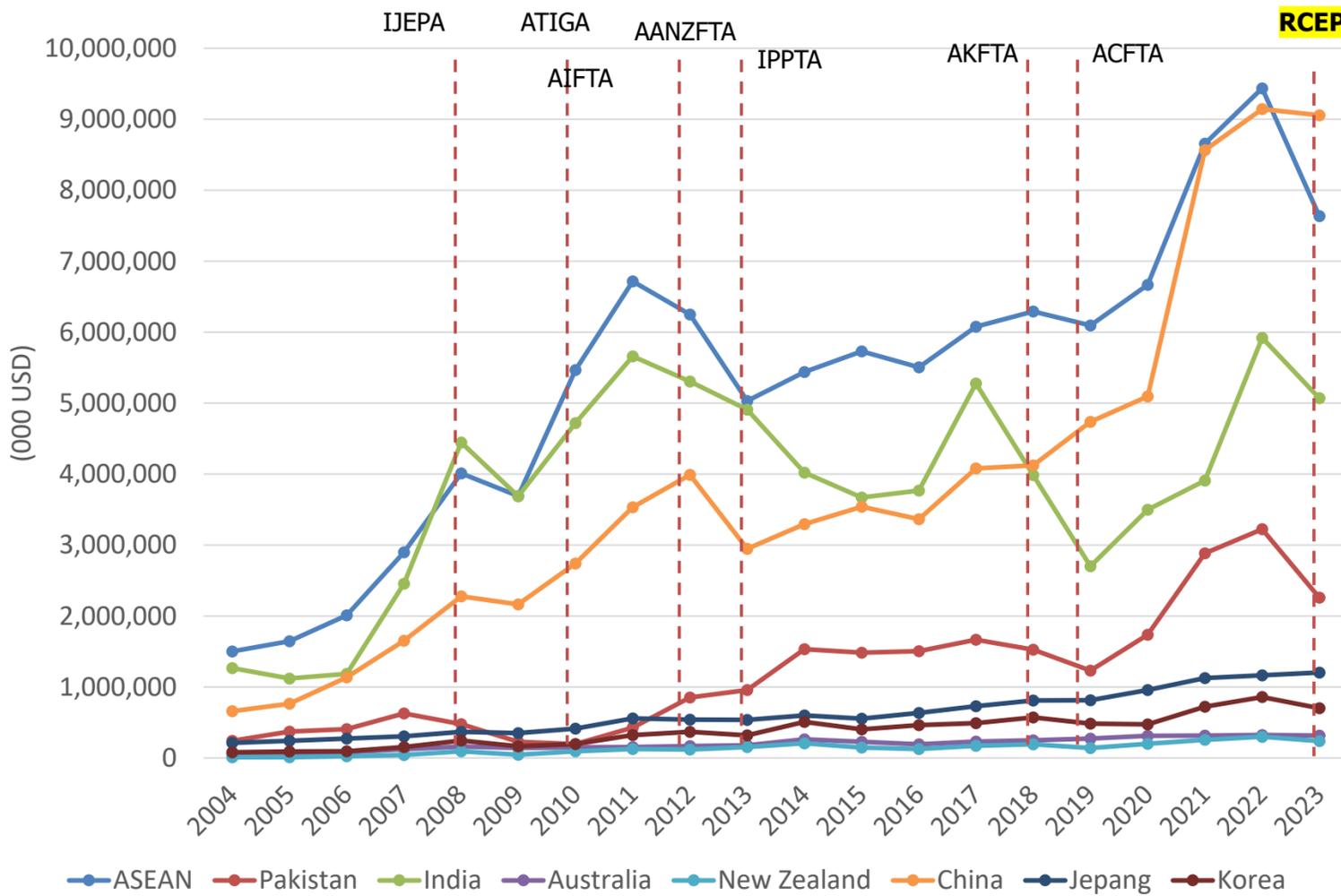


January 28th, 2025

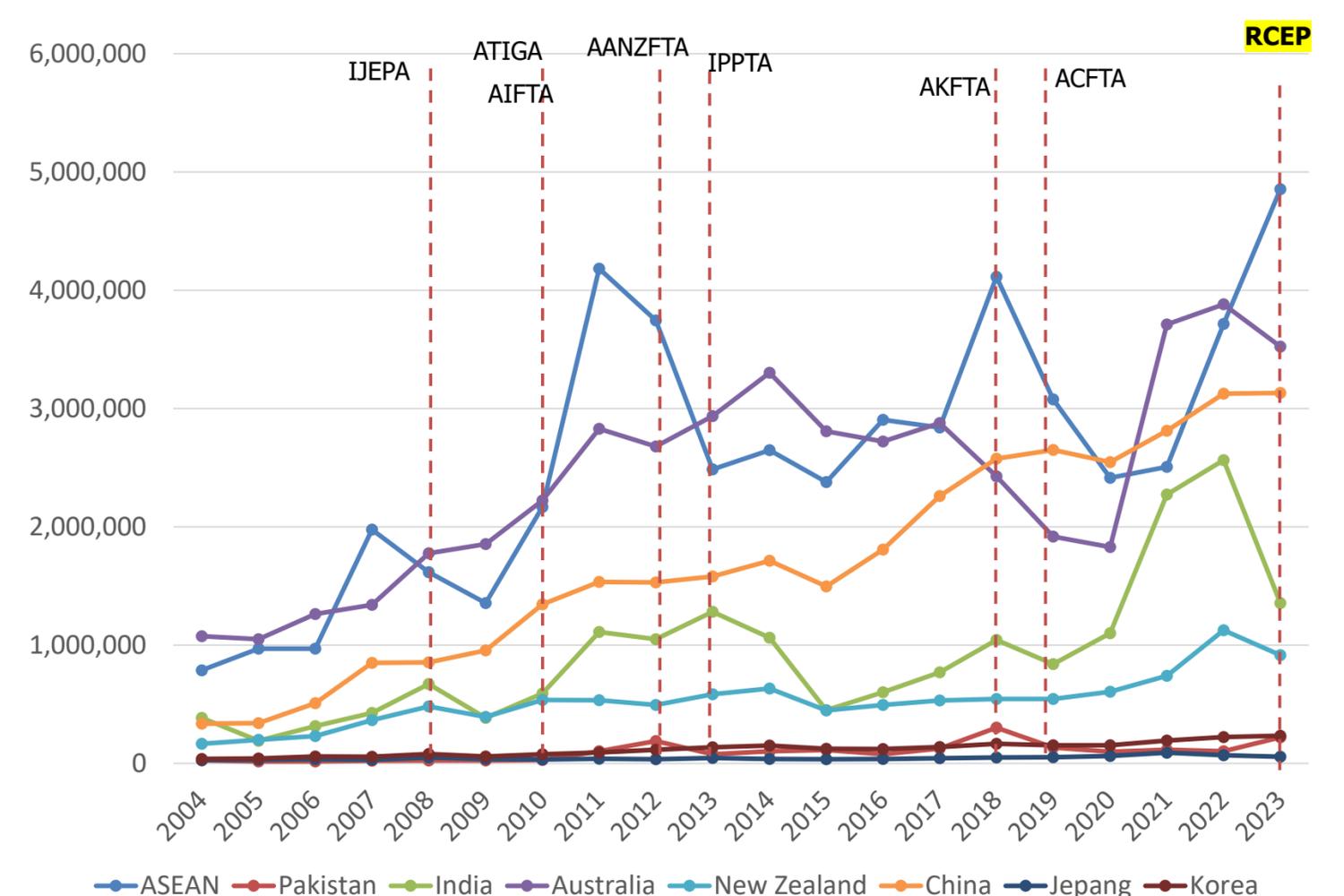


Agricultural Product Exports and Imports Before and After the FTA's Implementation

Trends in Agricultural Product Exports to FTA Partner Countries

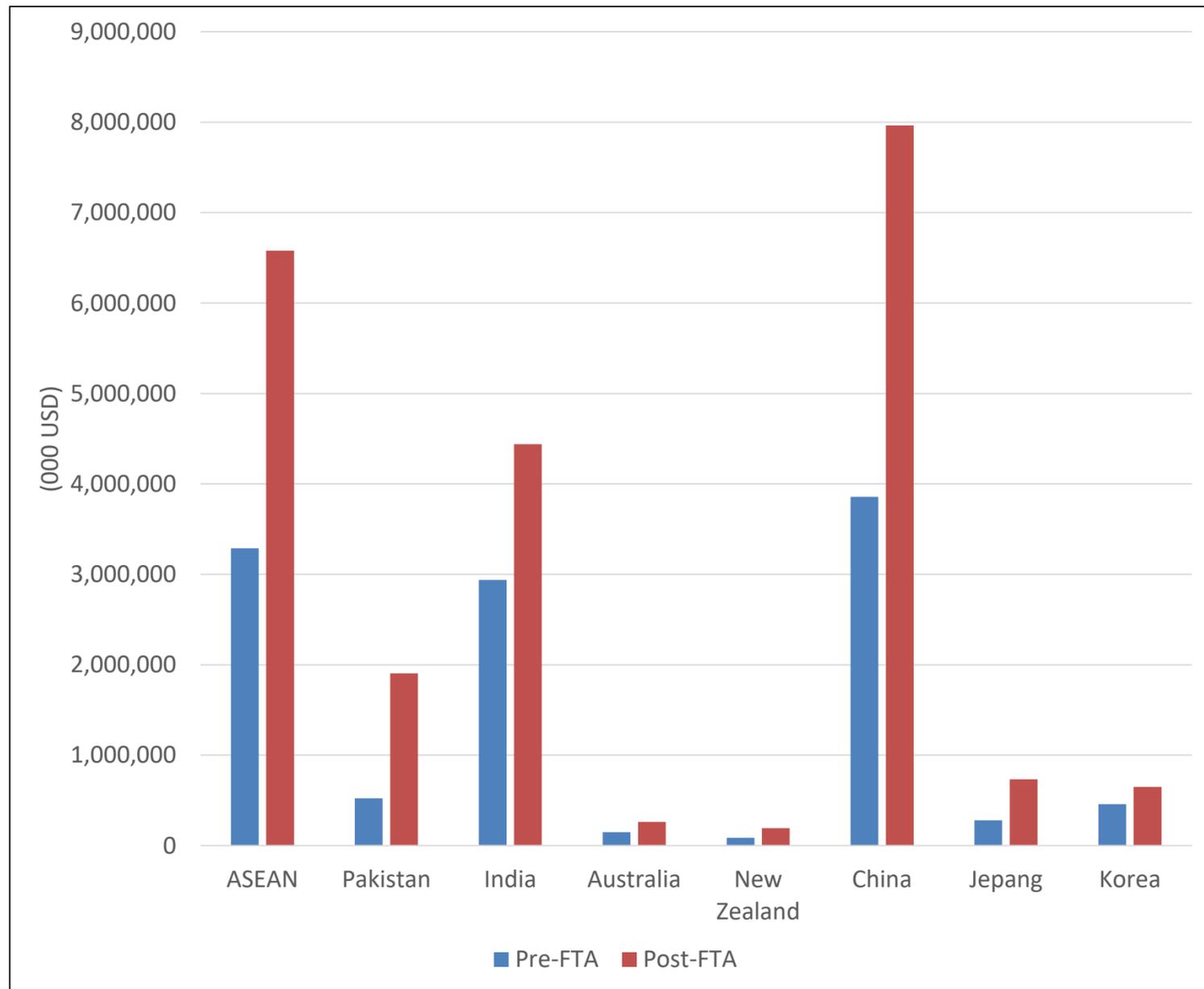


Trends in Agricultural Product Imports from FTA Partner Countries

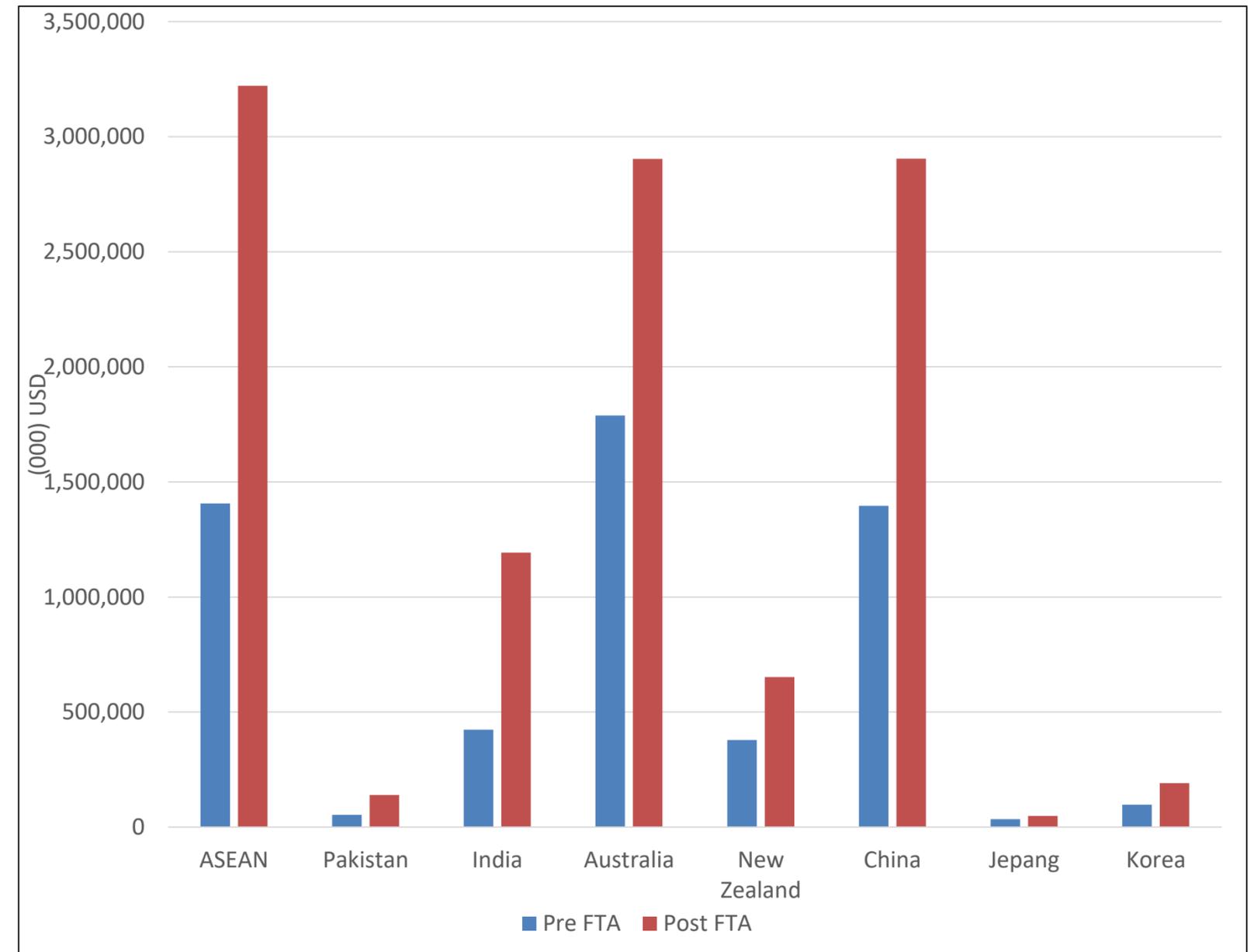


Comparison of agricultural product exports/imports

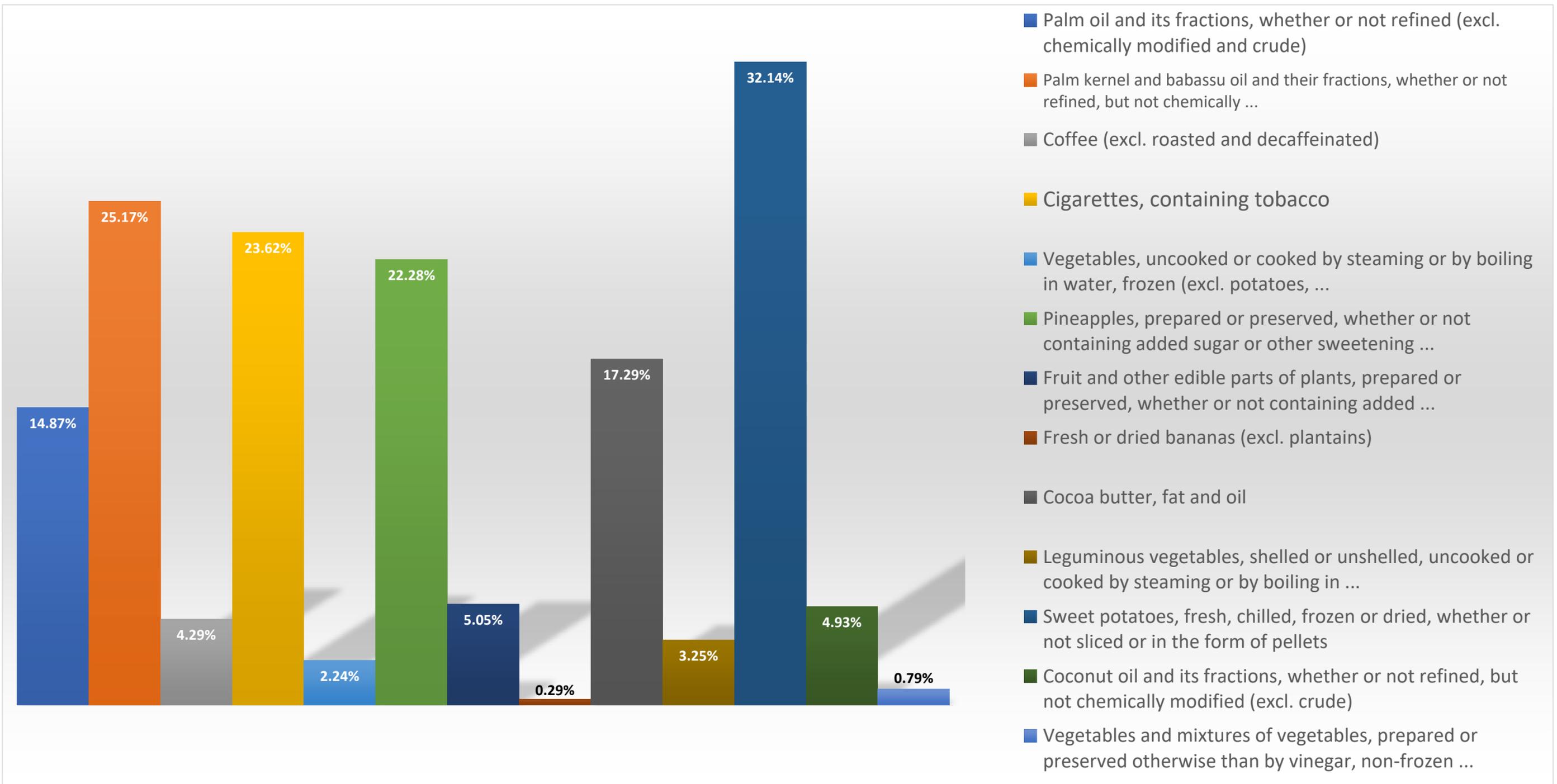
Comparison of agricultural product exports before and after the implementation of the FTA



Comparison of agricultural product imports before and after the implementation of the FTA



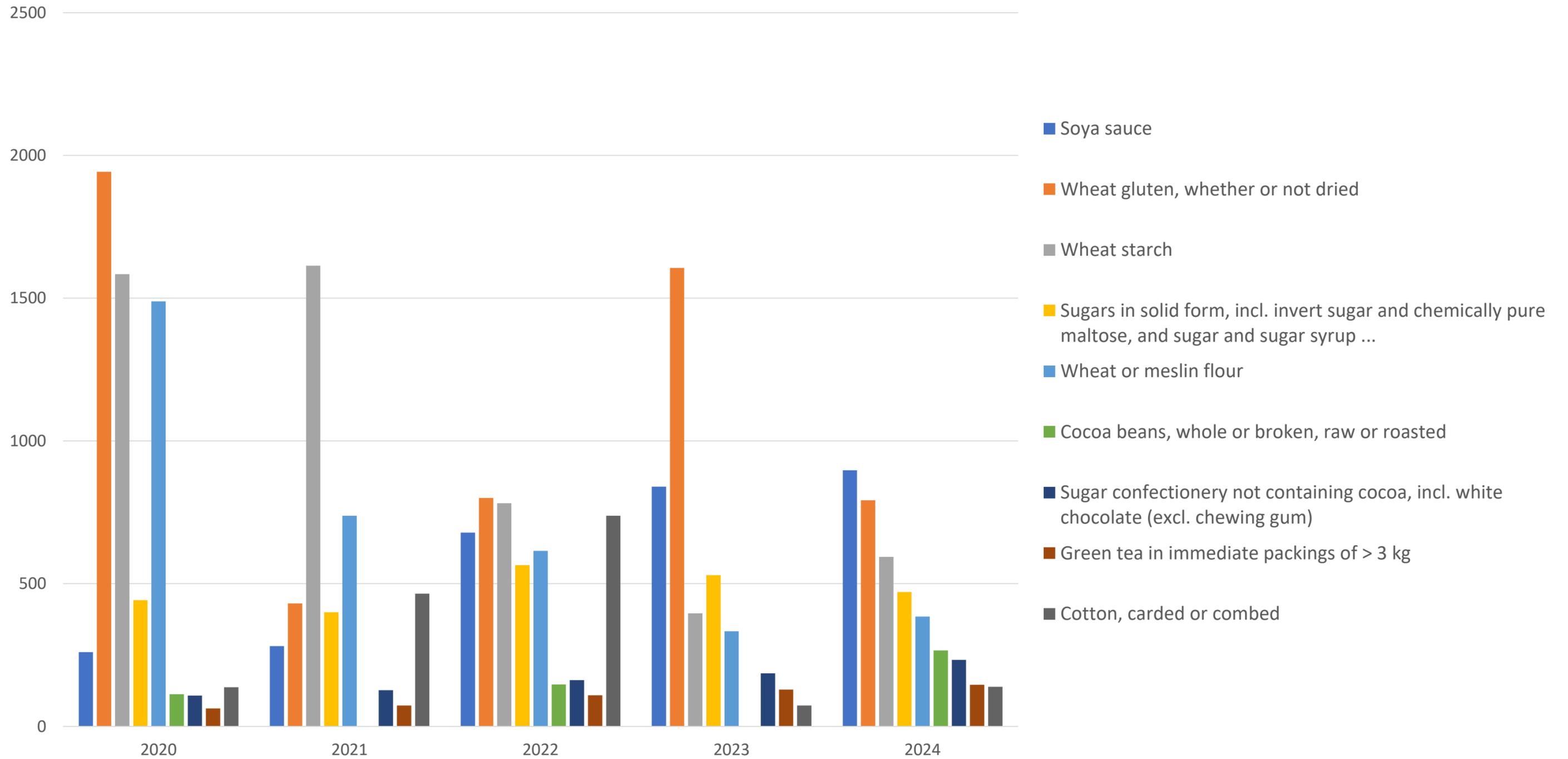
Market share of Indonesia's agricultural export products to Japan, 2024



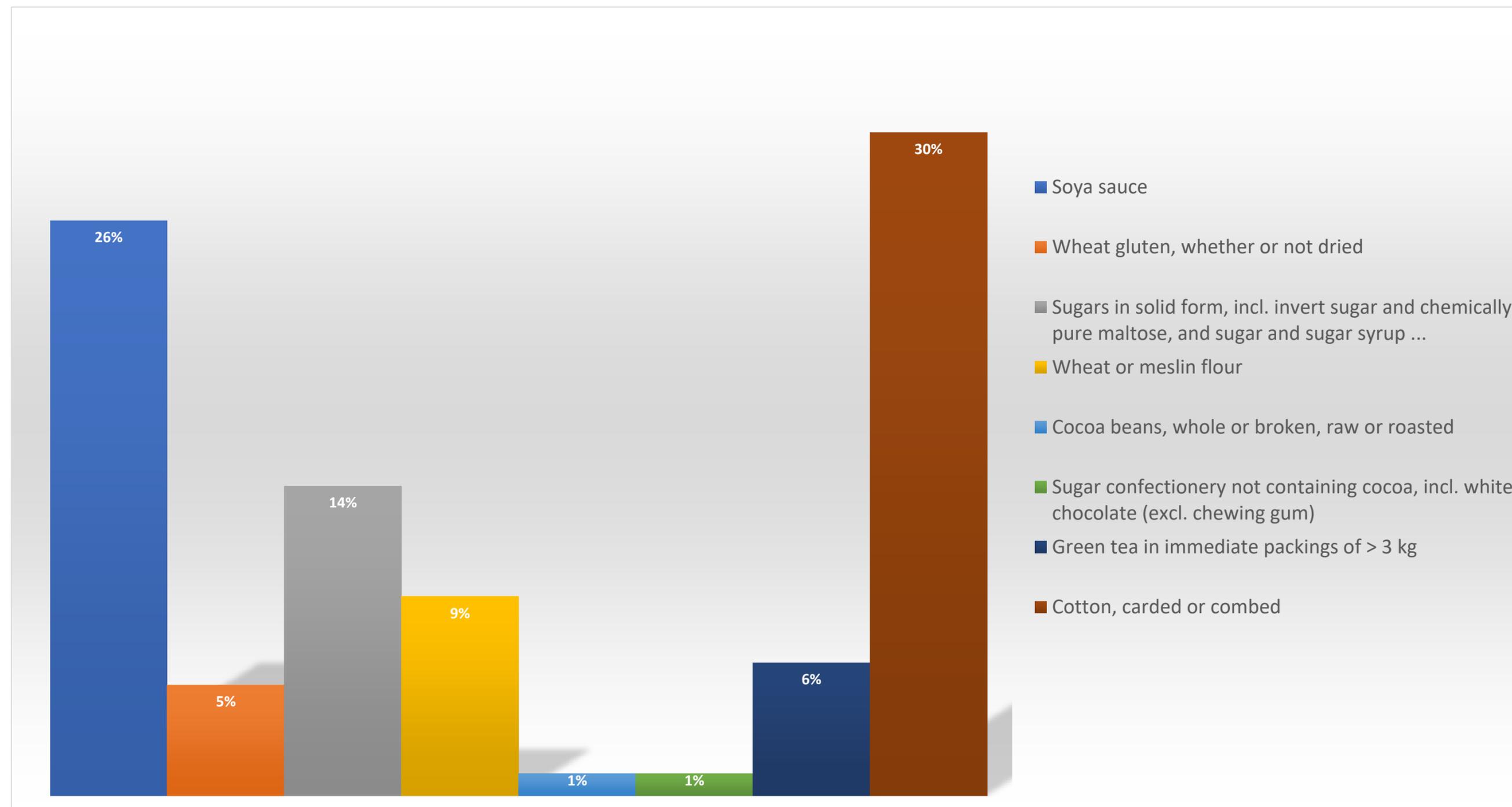
Potential export of Indonesia's agricultural products to Japan

Commodity	RCEP Benefits	Potential in the Japanese Market	Requirements
Processed Fruit (Pineapple, Banana, Guava, etc.)	Accumulation of regional value-added from auxiliary materials within RCEP member countries.	Japan highly favors frozen cut fruits and canned pineapples from Indonesia.	Compliance with Food Sanitation Act and JAS (Japanese Agricultural Standard) for processed food.
Animal Feed Raw Materials (Pellets, etc.)	More competitive import duties and more flexible Rules of Origin (ROO).	High demand from Japan's livestock sector as it shifts toward sustainable feed sources.	Phytosanitary Certificate and strict verification of non-hazardous raw material origin.
Processed Coffee (Roasted)	Stronger Intellectual Property (IP) protection under the RCEP Intellectual Property chapter.	Opportunity for local Indonesian brands to open outlets or sell branded coffee in Japan.	Maximum residue limits (MRLs) for pesticides and high-quality moisture content standards.
Tubers (Sweet Potato, Cassava, Porang)	Smoother trade facilitation for raw materials in the food industry.	Main ingredient for low-calorie noodles and food thickeners in the Japanese manufacturing industry.	Freedom from specific soil-borne pests and strict processing hygiene standards.
Edible Bird's Nest (EBN)	Facilitation of high-value processed downstream products through regional accumulation.	Growing niche market for luxury health supplements and premium beauty products in urban areas.	Sanitary certification and specific quarantine protocols verified by Japan's Animal Quarantine Service.
Palm Oil & Derivatives	Competitive tariffs for raw materials used in the beauty, soap, and food industries.	Stable demand for industrial use; increasing focus on "Ethical & Green" consumer products.	RSPO/ISPO Certification (Sustainability standards) and strict chemical purity tests.
Natural Rubber & Tires	Simplified Rules of Origin (ROO) for automotive components within the regional supply chain.	Japan's massive automotive industry requires a constant supply of high-grade natural rubber and tires.	International quality standards (ISO), strict physical properties verification, and eco-labeling.
Cocoa & Chocolate Products	Duty-free access for processed cocoa butter and powder used in Japan's confectionery.	Growth in the "Craft Chocolate" segment and high-end bakery industries in Tokyo and Osaka.	Strict bacteriological standards (Salmonella-free) and pesticide residue limits (MRLs).

Indonesia's Agricultural Product Imports from Japan



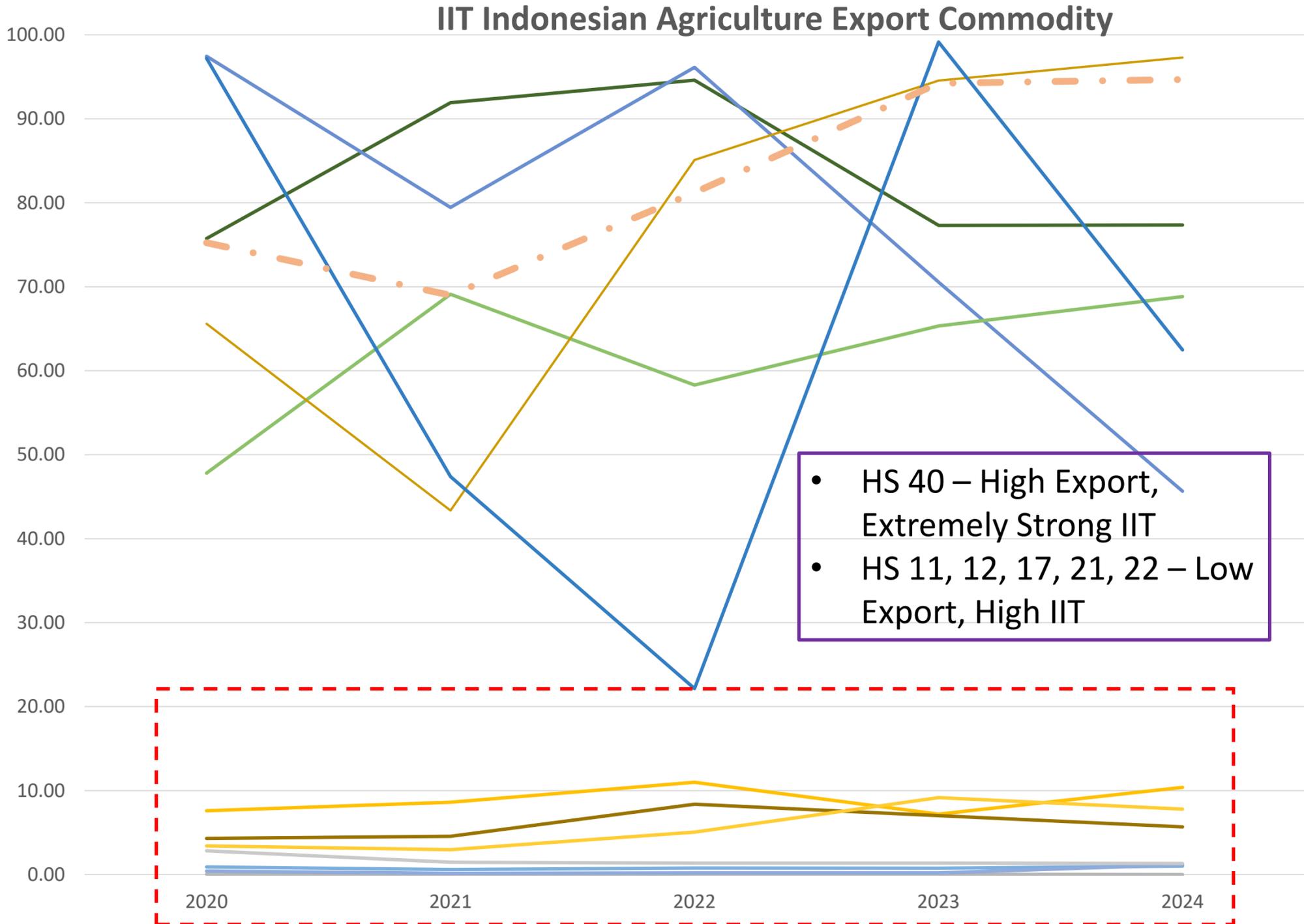
Market share of Indonesia's agricultural import products from Japan, 2024



Potential export of Japan's agricultural products to Indonesia

Commodity	RCEP Benefits	Potential in the Indonesian Market	Requirements
Premium Fruits (Apple, Pear, Muscat Grape)	Guaranteed expedited release within 6 hours to maintain maximum freshness.	Penetration into high-end supermarkets for middle-class consumption and luxury gifting.	Phytosanitary Certificate, compliance with Indonesian pesticide residue limits, and cold chain labeling.
Beef (Wagyu)	More competitive import duties and simplified regional export certification.	High demand in the premium Horeca (Hotel, Restaurant, Cafe) sector in major cities.	Halal Certification (recognized by BPJPH), Health Certificate from the Japanese Ministry of Agriculture.
Processed Green Tea & Matcha	Regional value-added accumulation when using auxiliary materials from other RCEP members.	Key raw material for the cafe industry, bakeries, and the growing healthy lifestyle trend.	Halal Certification, BPOM (Indonesian FDA) registration/ML number, and ingredient transparency.
Premium Rice (Koshihikari)	Regulatory certainty and transparent import procedures through RCEP standard harmonization.	Required for authentic Japanese restaurants and consumers prioritizing premium quality.	Import permits from the Indonesian Ministry of Trade and quality grade certification.
Seasonings & Sauces (Miso, Soy Sauce, Dashi)	Regional Cumulation: Can use ingredients from other RCEP members to meet "Originating" status.	Essential for the thousands of Japanese restaurants and home cooks in Indonesia.	Halal Certification (Must be alcohol-free for the ID market), BPOM registration, and salt level labels.

Intra Industry Trade in Agriculture Commodities



- 03 Fish and crustaceans, molluscs and other aquatic invertebrates
- 09 Coffee, tea, maté and spices
- 11 Products of the milling industry; malt; starches; inulin; wheat gluten
- 12 Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal ...
- 14 Vegetable plaiting materials; vegetable products not elsewhere specified or included
- 15 Animal, vegetable or microbial fats and oils and their cleavage products; prepared edible fats; ...
- 16 Preparations of meat, of fish, of crustaceans, molluscs or other aquatic invertebrates, or ...
- 17 Sugars and sugar confectionery
- 21 Miscellaneous edible preparations
- 22 Beverages, spirits and vinegar
- 24 Tobacco and manufactured tobacco substitutes; products, whether or not containing nicotine, ...
- 40 Rubber and articles thereof
- 44 Wood and articles of wood; wood charcoal

HS 3, 9, 14, 15, 16, 24 – High Export, Weak IIT



Thank You

