

INDONESIAN PERSPECTIVE OF AUSTRALIAN WHEAT GRAIN

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**Australian Grain Industry Conference (AGIC)
Shangri La Hotel - Singapore
March 1st , 2016**

Indonesia Economy

	Unit	2014	2015	2016 (Est)
Population*	Million	252	255	258
Economic Growth	%	5.02	4.7	5.3***
GDP per Capita**	USD	3,491.9	3,377.1	
Inflation	%	8.36	3.35	4.7**
Exchange Rate (vs USD) ***	IDR	11,878	13,400	13,900***

* National Development Planning Agency (BAPPENAS RI)

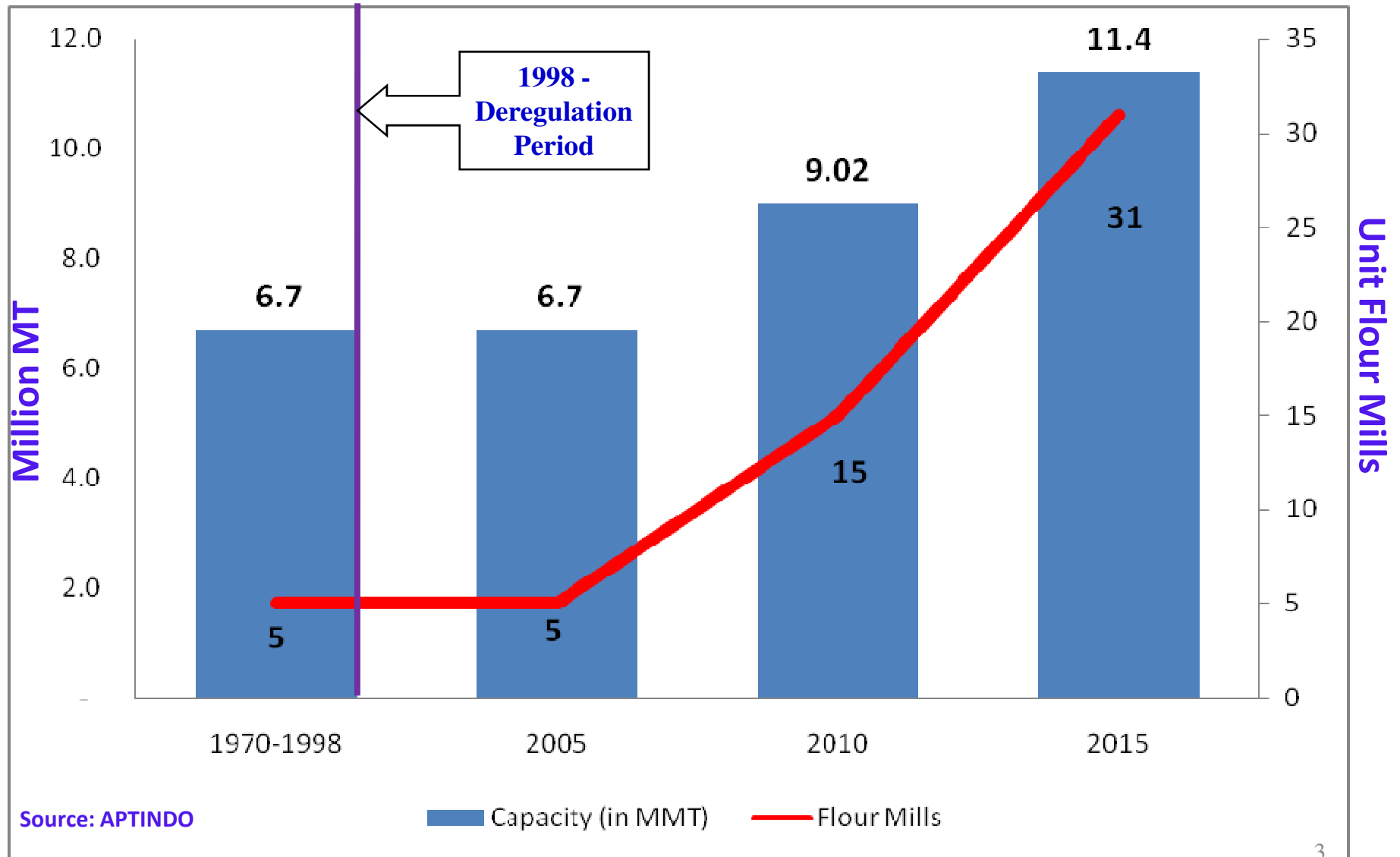
** World Bank

*** The Indonesian Budget of 2016 (APBN 2016)

**** Average in 2014 & 2015

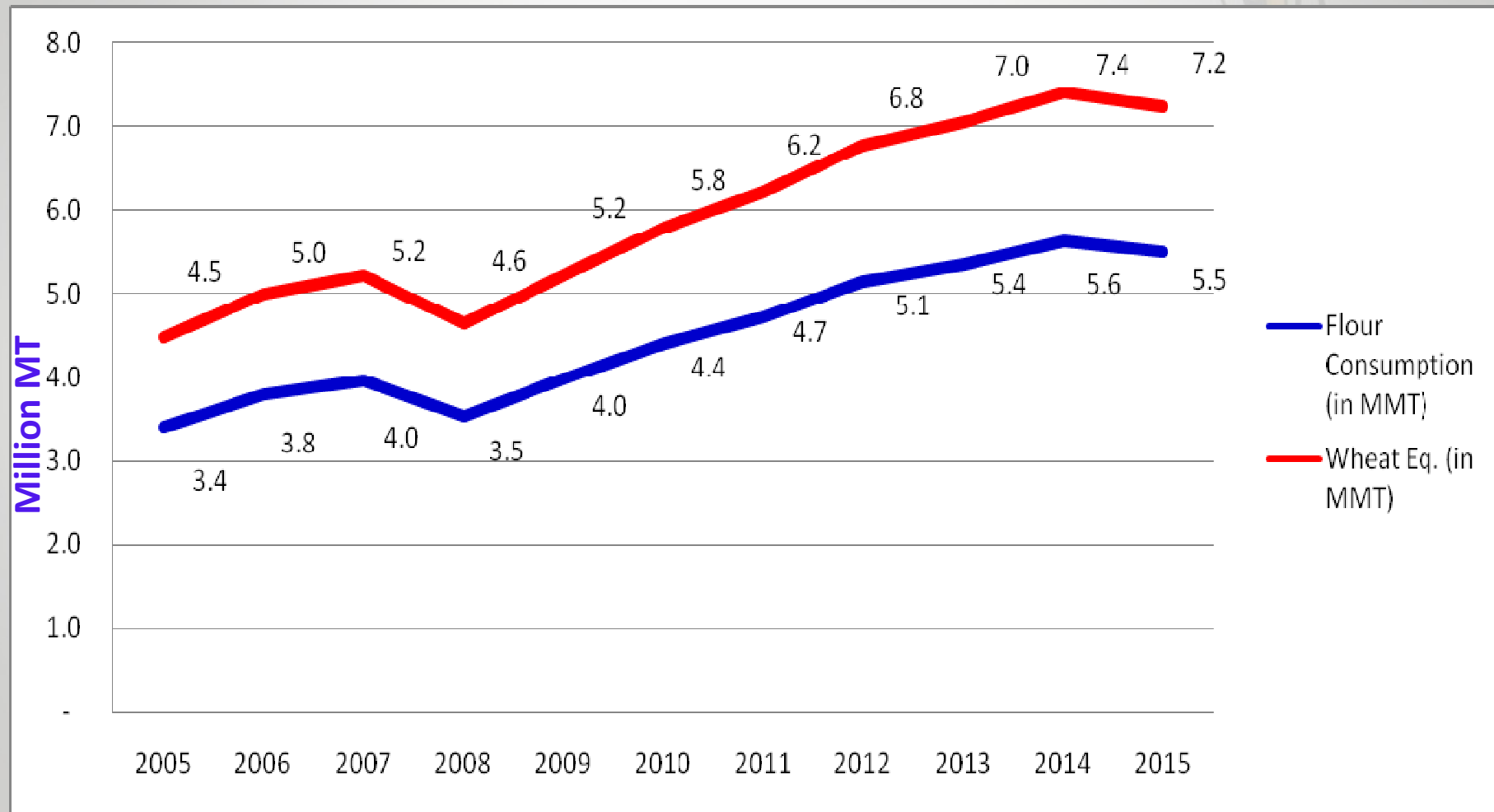
INDONESIAN WHEAT FLOUR INDUSTRY

1970-1998: 5 flour mills & 2016: 31 flour mills



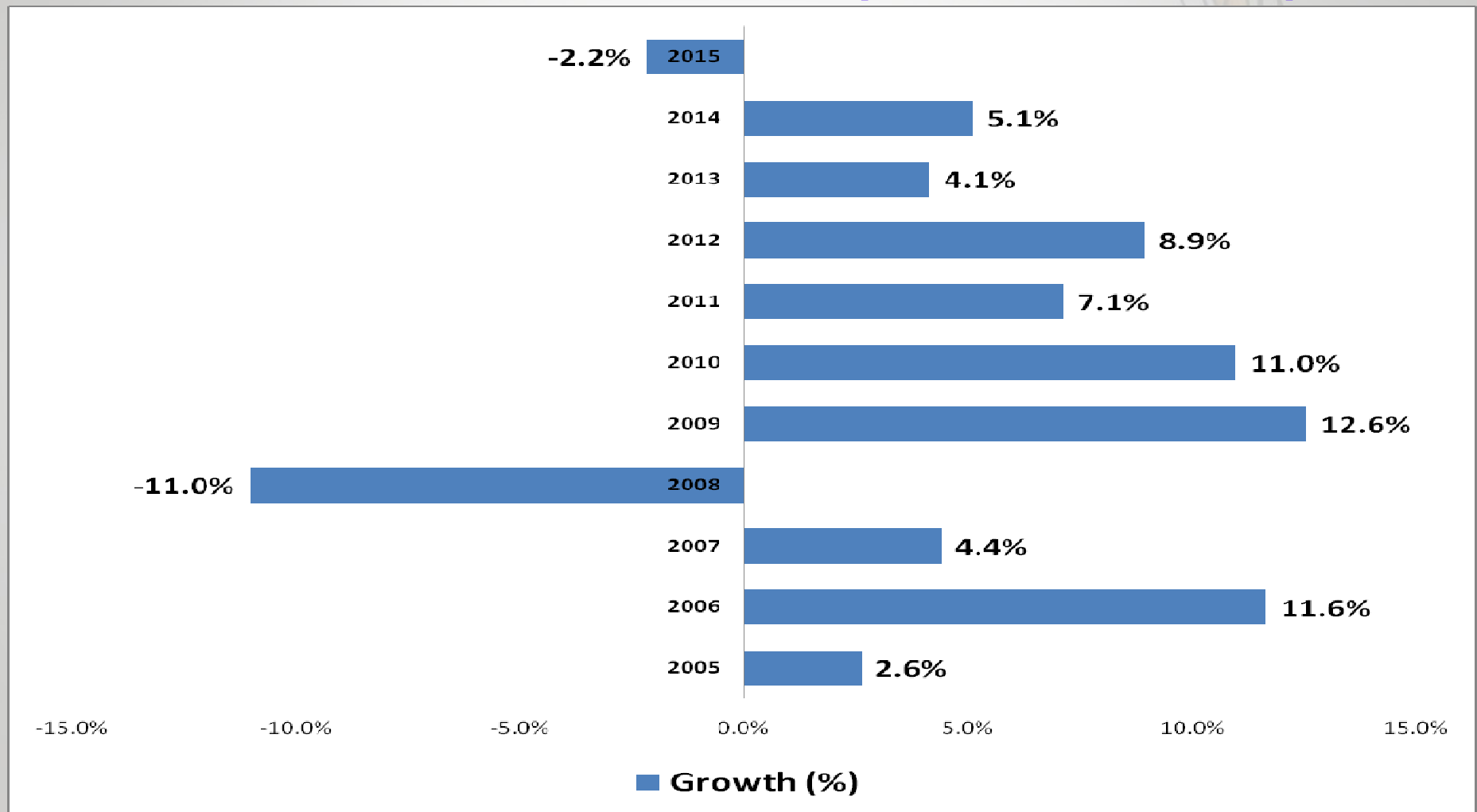
INDONESIAN WHEAT FLOUR CONSUMPTION

INDONESIAN WHEAT FLOUR CONSUMPTION PERIOD: 2005- 2015 (In MMT)



Source: APTINDO

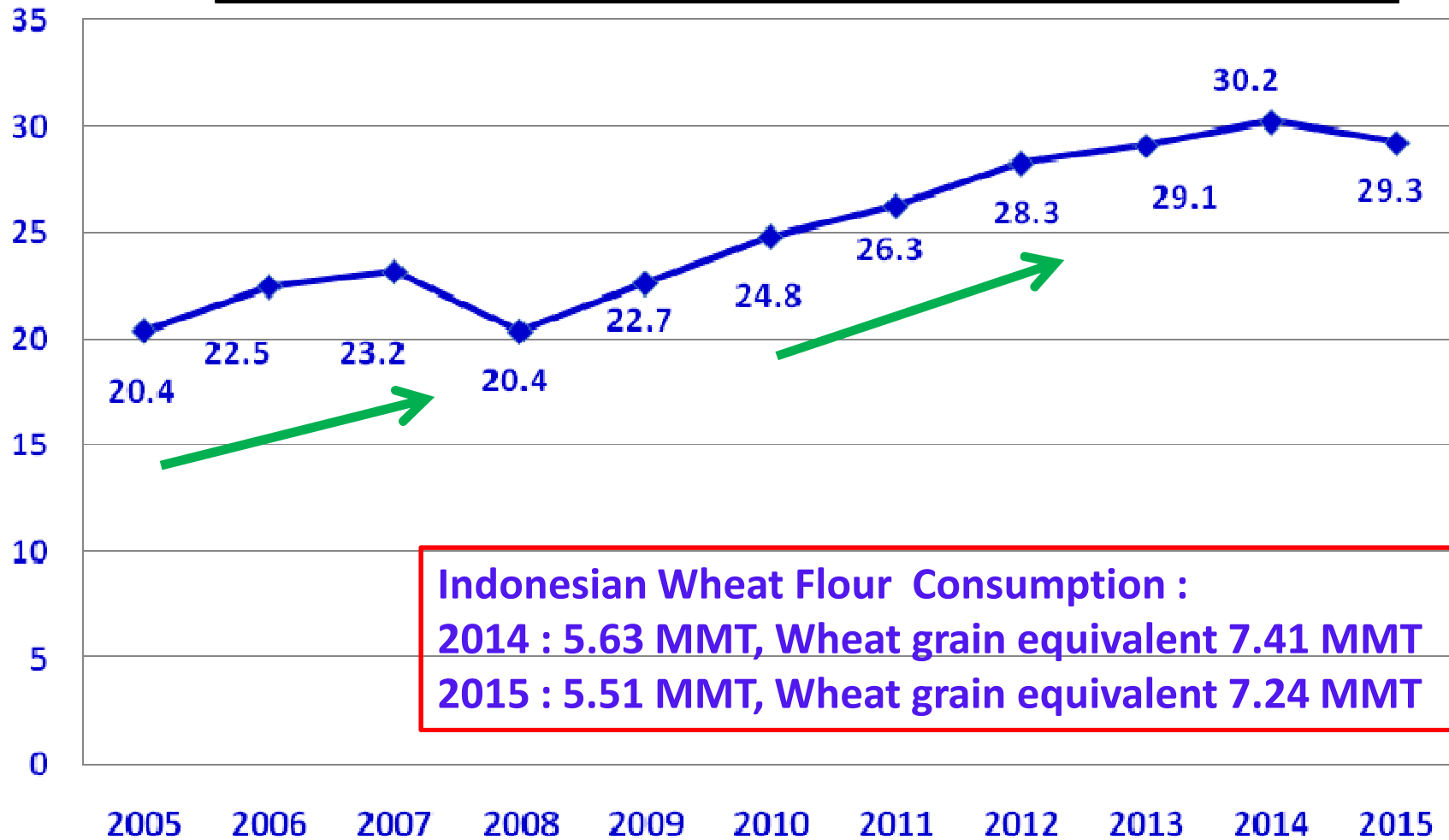
INDONESIAN WHEAT FLOUR CONSUMPTION PERIOD: 2005- 2015 (Growth, in %)



Source: APTINDO

**Indonesia: Percapita Consumption of Wheat Equivalent
(kgs/cap/year). Period: 2005 - 2015**

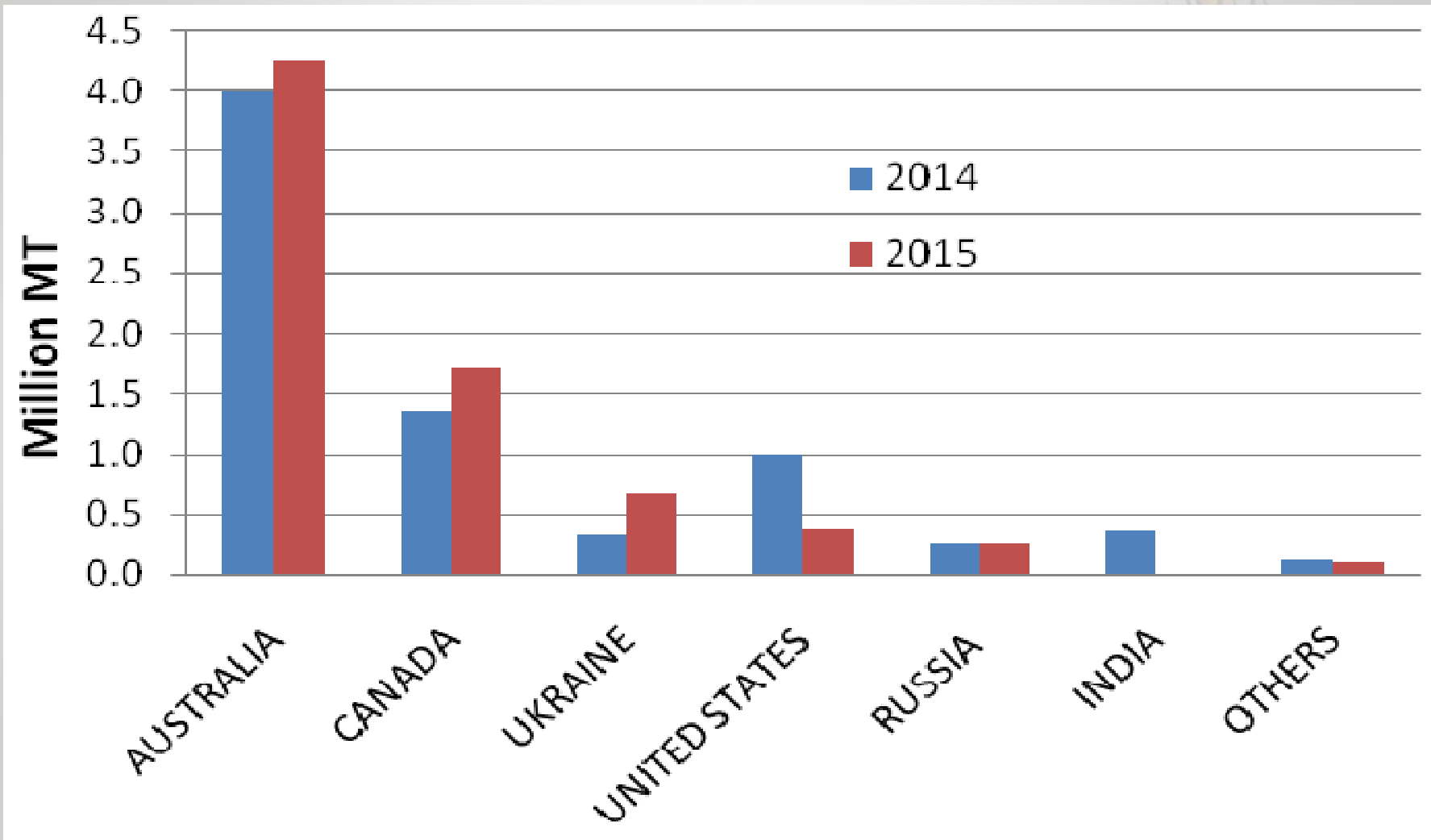
kg/cap/year



Indonesian Wheat Flour Consumption :
2014 : 5.63 MMT, Wheat grain equivalent 7.41 MMT
2015 : 5.51 MMT, Wheat grain equivalent 7.24 MMT

Source: APTINDO

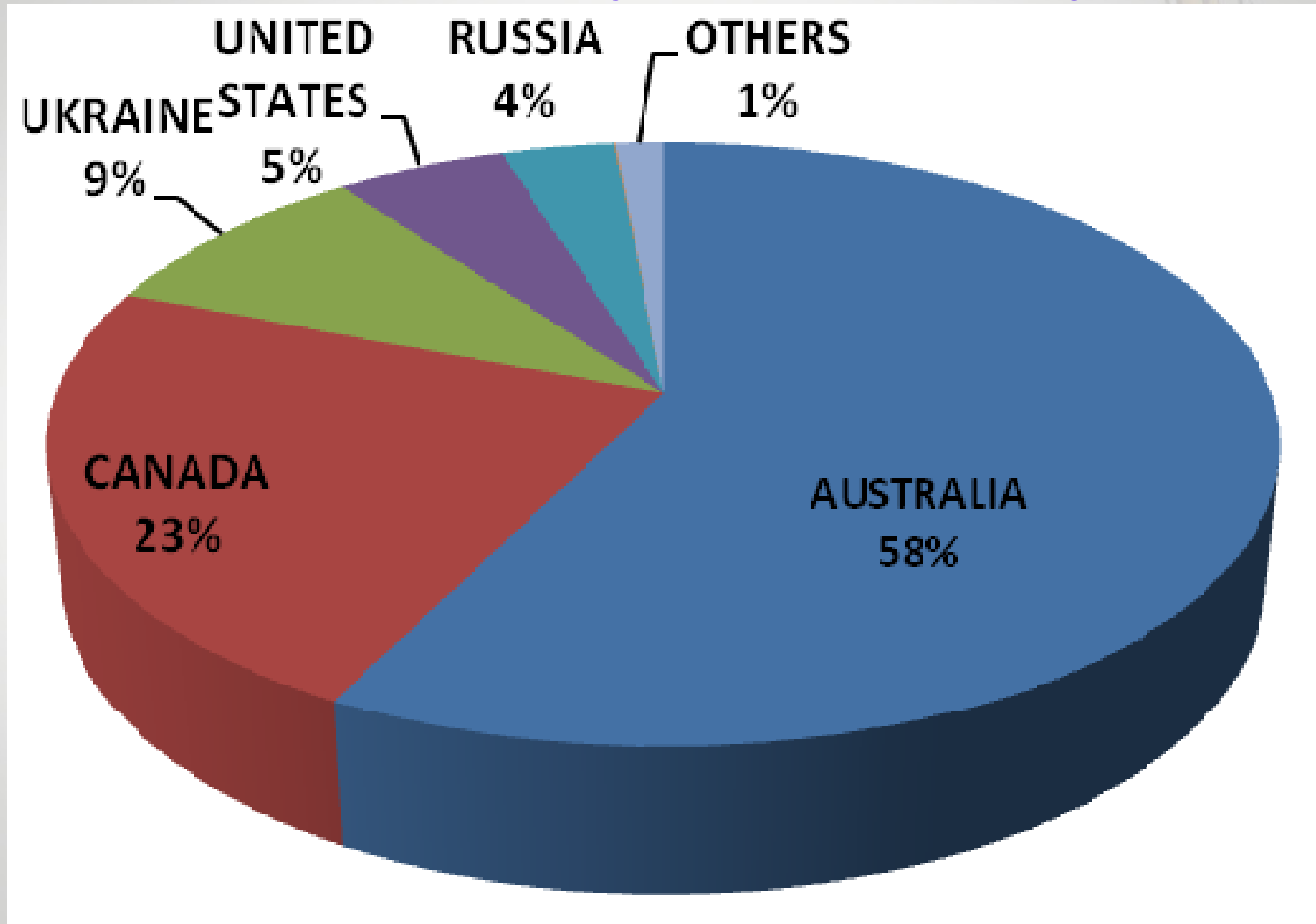
INDONESIAN WHEAT GRAIN IMPORTS (2015 vs 2014) (Total Import 2015: 7.41 MMT)



Source: BPS (Central Bureau of Statistic Indonesia)

INDONESIAN WHEAT GRAIN IMPORTS

Period: 2015 (Total: 7.41 MMT)



Source: BPS (Central Bureau of Statistic Indonesia)

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In General:

1. The quality of Australian wheat is relatively consistent in the one harvest period.
2. Australian Wheat:
 - good wheat quality (bright noodle color, consistent dough characteristic)
 - good milling property (good flour extraction, less foreign matters, low wheat moisture)

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3. Services:

Very good services from Australian Government & traders. No quarantine and customs issues. We feel confident in the Australia – Indonesia quarantine recognition

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2015/2016 Crop year:

1. Lower gluten
2. A bit higher foreign matters/screenings
3. Relatively expensive

Expectation:

1. Availability of APH13 & AH13
2. Development of high protein wheat for bread

CONCLUSION:

1. Flour Mills Industry grows since the 1998:
 - 1970 – 1998 (Bulog Era) : 5 Flour Mills
 - in 2015 (post deregulation) : 31 Flour Mills
(centralized in Java, 26 flour mills)
 - Total Wheat Milling Capacity : 11.4 Million MT
2. Percapita consumption: 22.2 kg/cap/year (Wheat eq. 29.3 kg/cap/year)
3. In general, The quality of Australian wheat is relatively consistent in the one harvest period.
4. Australian Wheat: good wheat quality (bright noodle color, consistent dough characteristic); good milling property (good flour extraction, less foreign matters, low wheat moisture)

THANK YOU