

Indonesia Palm Oil Updates

Togar Sitanggang

Gabungan Pengusaha Kelapa Sawit Indonesia (GAPKI)



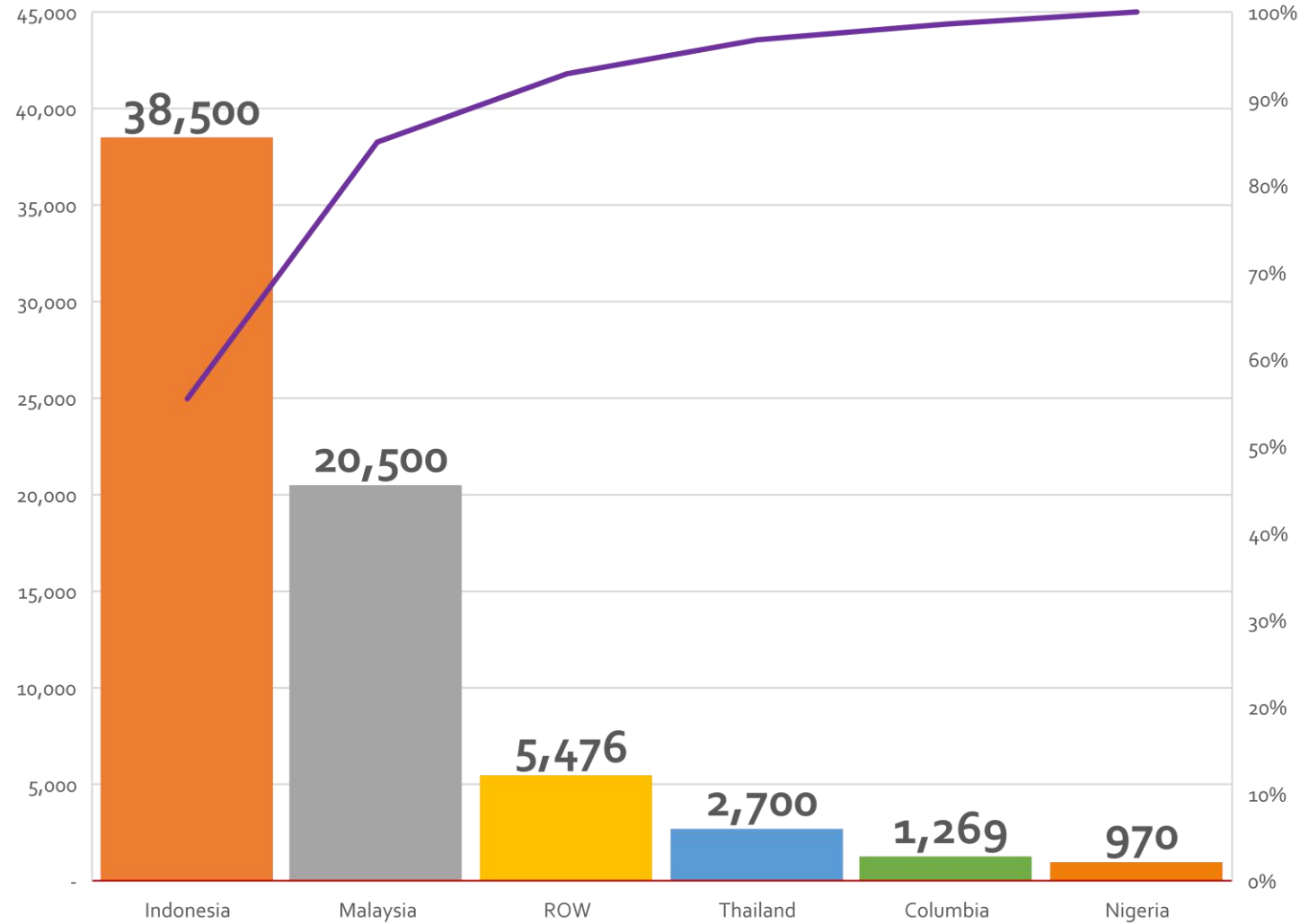


GAPKI –
Gabungan
Pengusaha
Kelapa Sawit
Indonesia
(IPOA-
Indonesia
Palm Oil
Association)

- Established 27 February 1981
- Current members: 668 companies
- Current area: 3.6 million ha
- Branches: 12 provinces

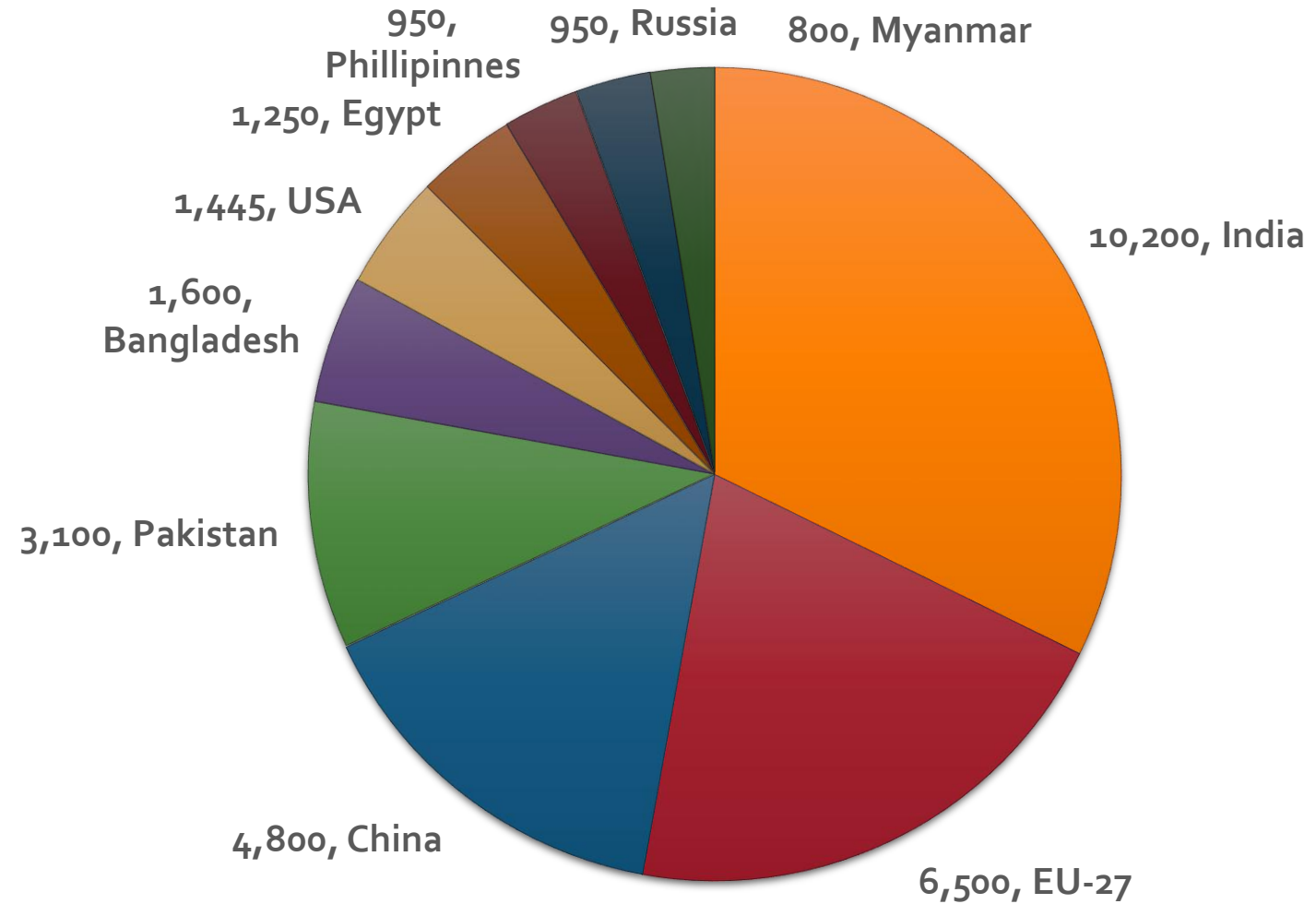


Palm Oil Producing Countries – 2017/2018



Source: USDA

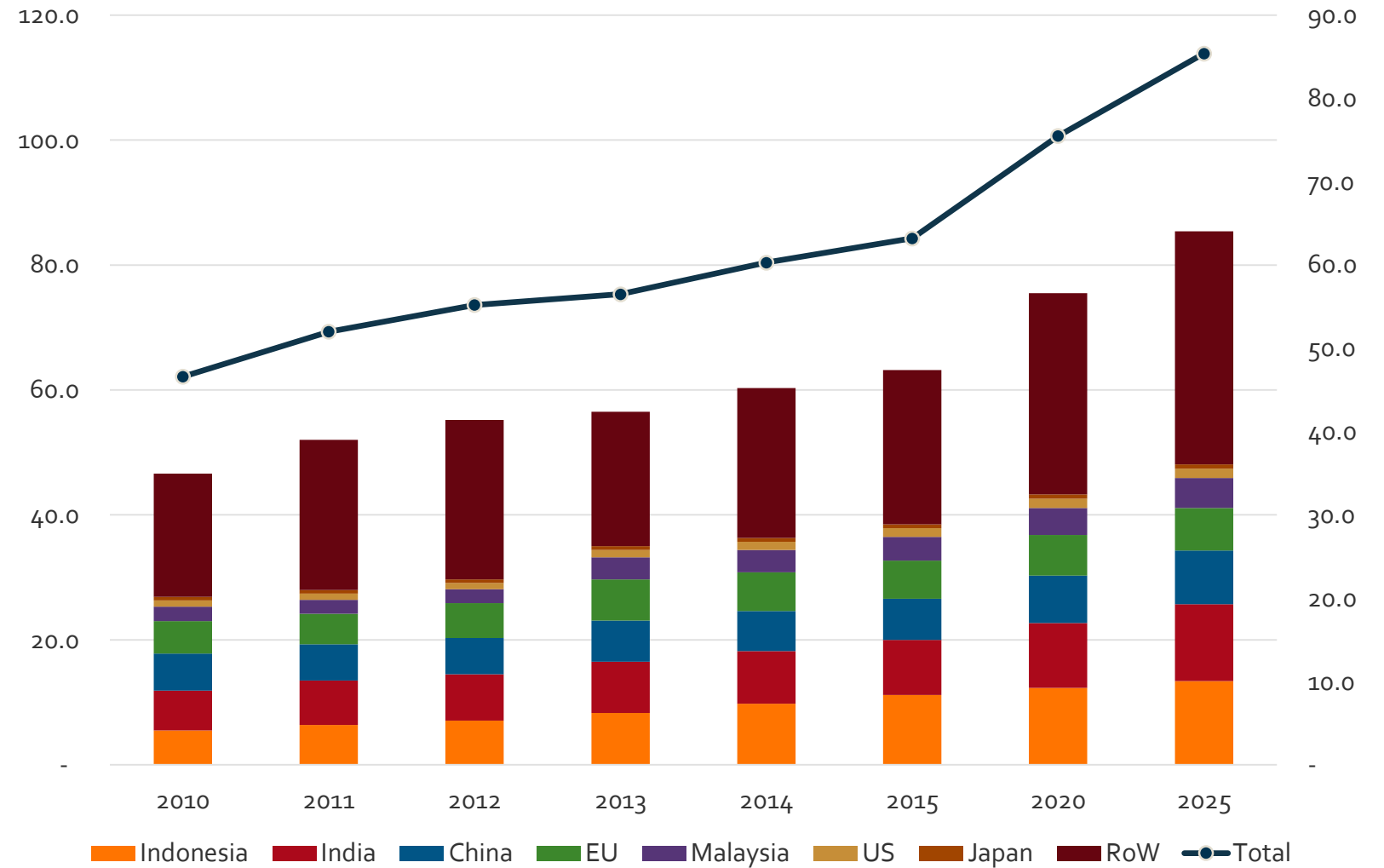
Palm Oil Importing Countries – 2017/2018



Source: USDA

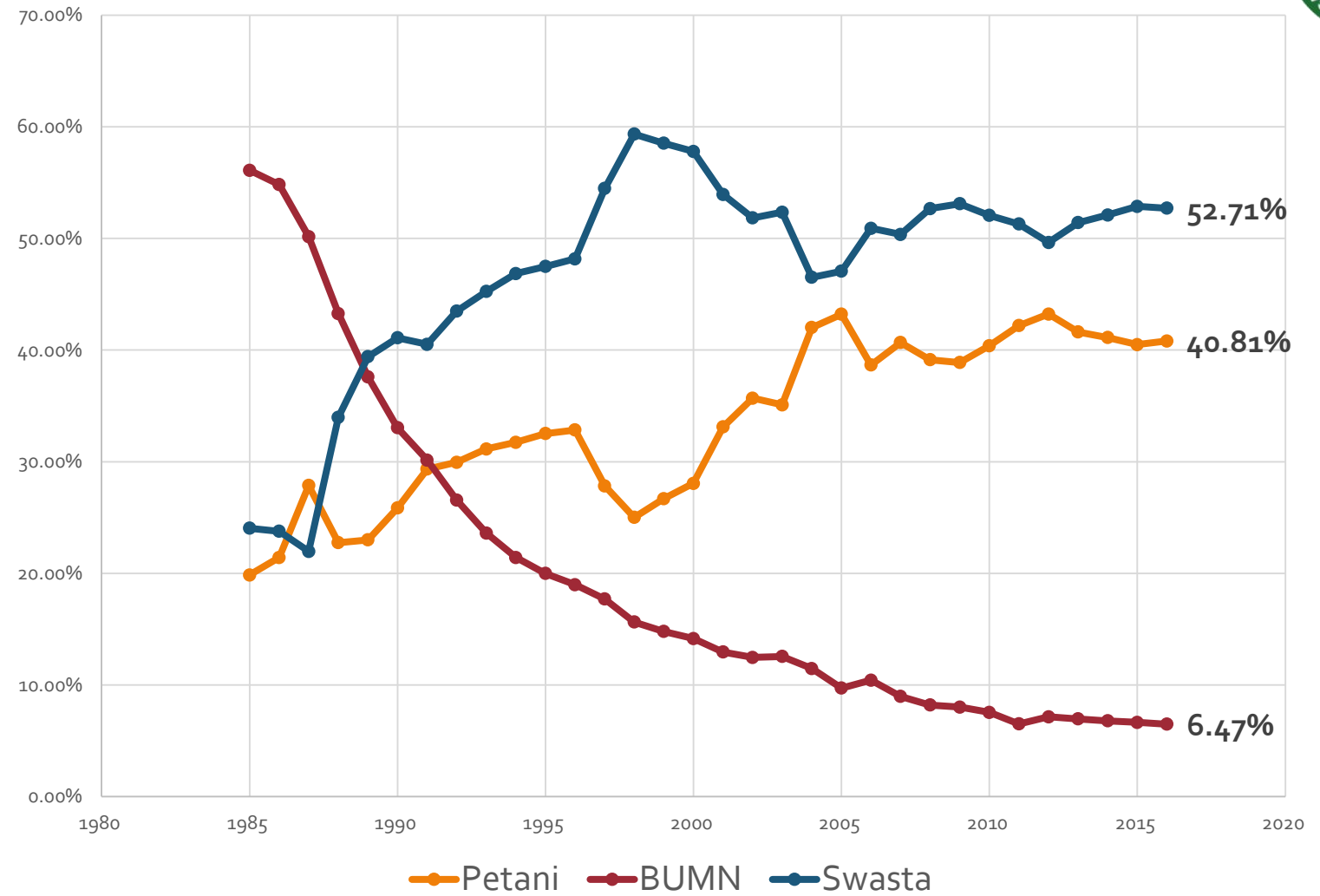


World Palm Oil Demand



Source: LMC International

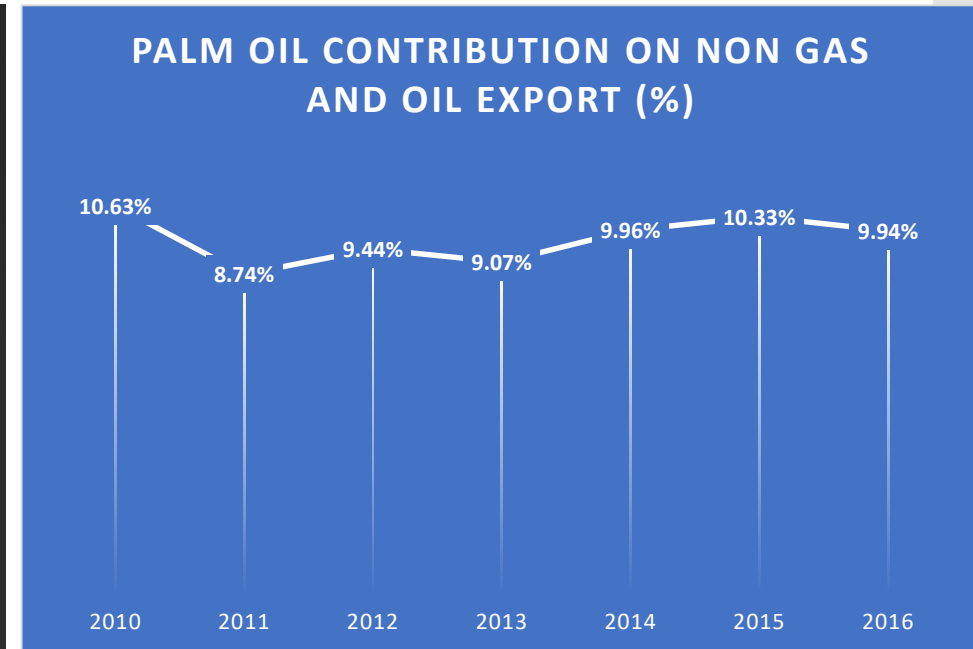
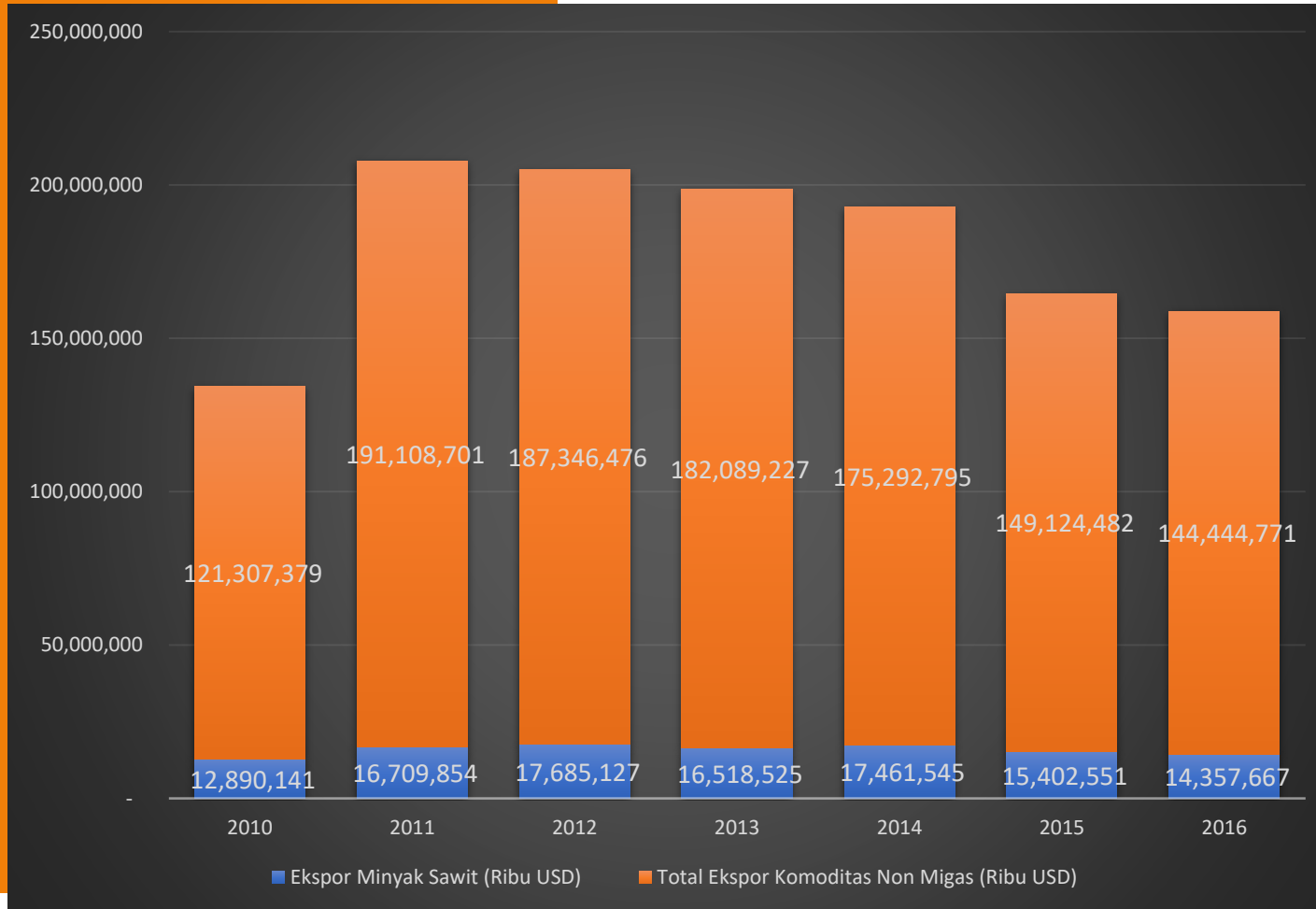
Ownership of Indonesia Oil Palm Plantations



Sumber: Data Statistik Ditjen Perkebunan 2016



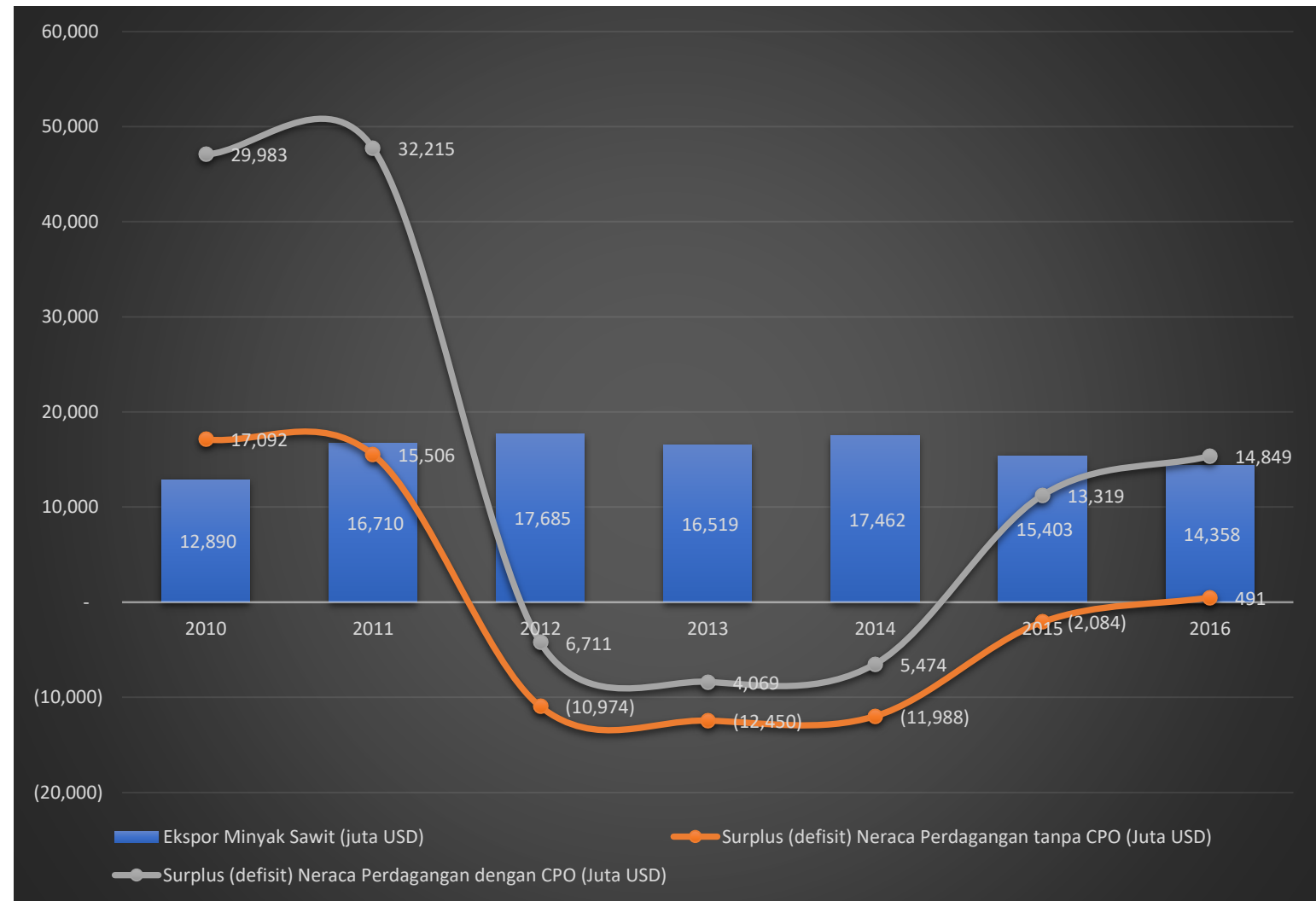
Palm Oil Contribution for Indonesia Foreign Exchange



In the last 7 years, Palm Oil contribution on non Oil and Gas export is 9.73% in average.

Source: SEKI-BI, 2017

Palm Oil Importance on Indonesia Trade Balance – US\$



Source:SEKI-BI, 2017 diolah

Labour Force in Oil Palm Plantations

Table 5.2. Employment Growth in Indonesian Oil Palm Plantation (People)

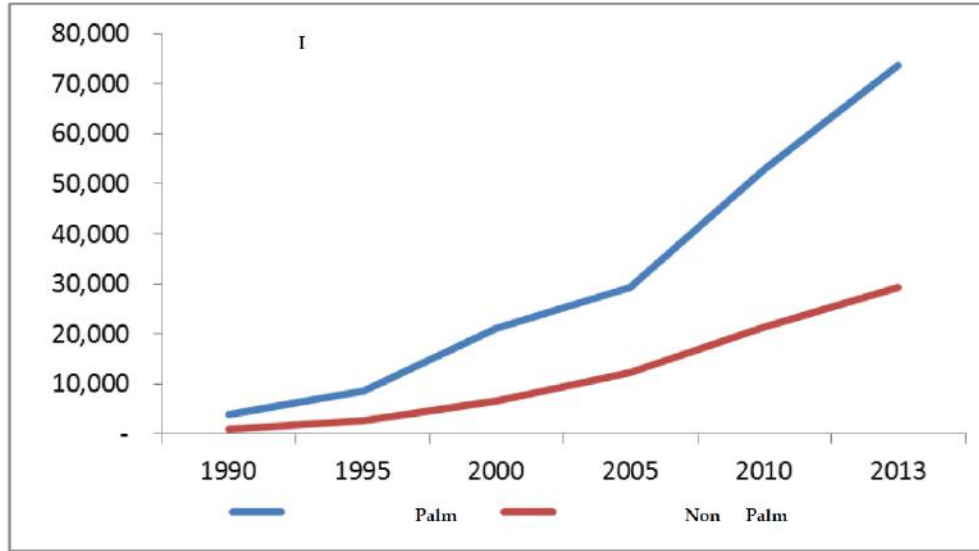
Description	2000	2005	2010	2013
B. Labor in SME, Oil Palm Plantation Supplier of Goods/services	15.548	194.177	372.861	396.623
C. Labor in Oil Palm Plantation				
1. Labor	1.360.000	2.370.000	3.420.000	3.830.000
2. Company Staff	717.916	73.261	1.199.552	1.286.347
Total Labor	2.093.464	2.637.438	4.992.413	5.512.970

Sumber: PASPI, 2015

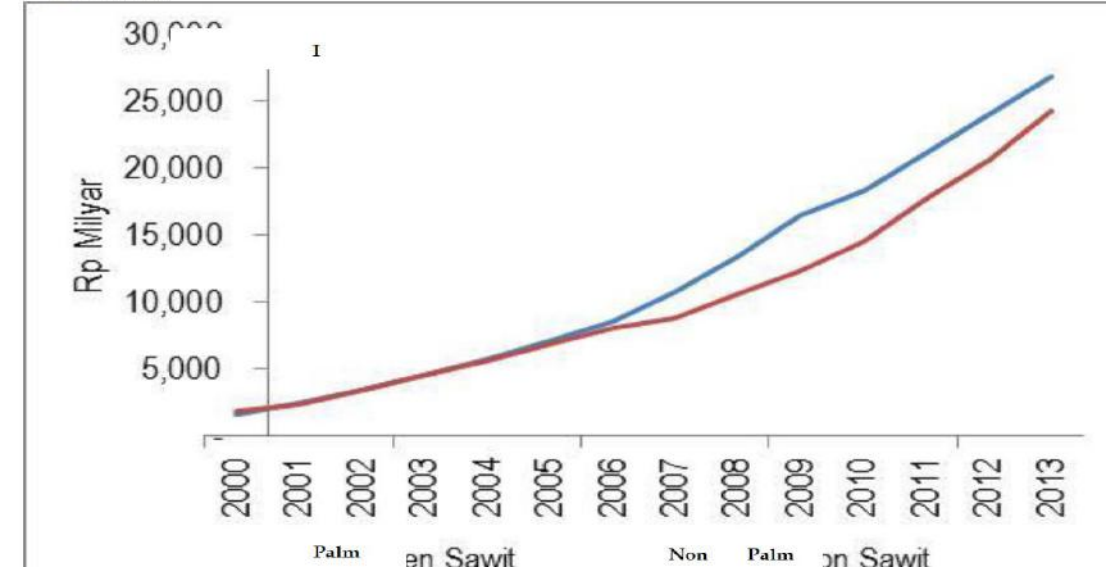
Palm oil industry drives regional economy



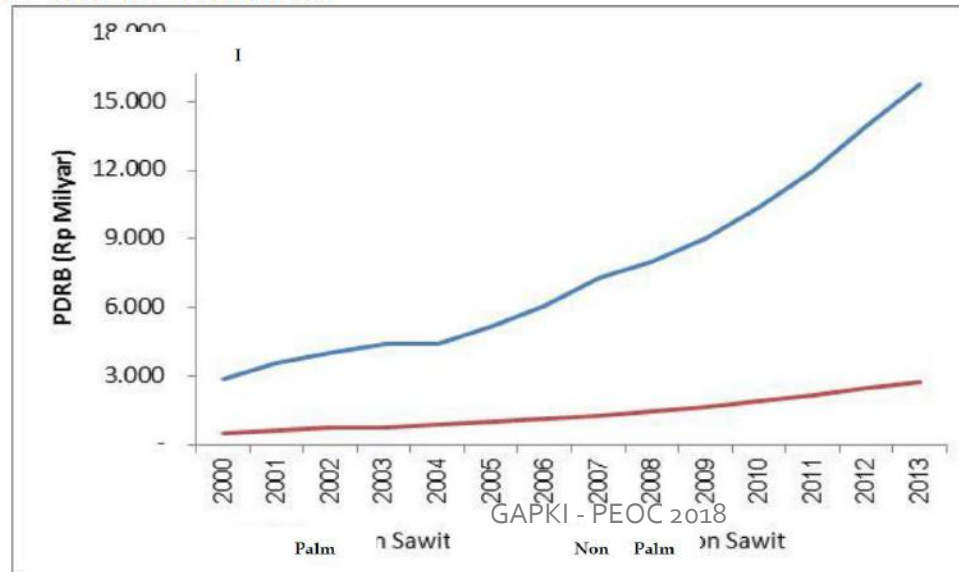
A. North Sumatera



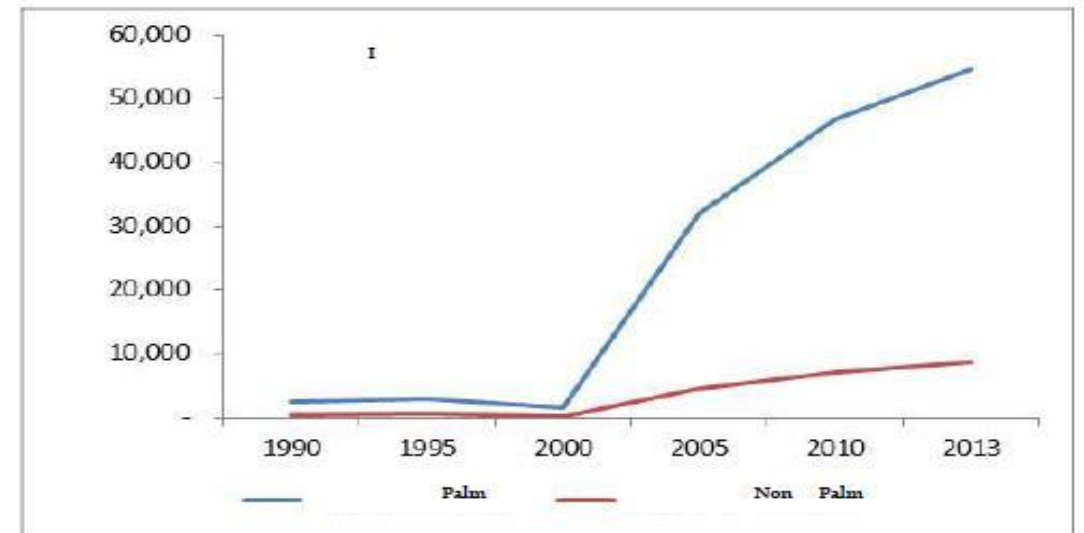
B. Riau



C. South Sumatera



D. Central Kalimantan



Palm Oil Processing Capacity (000 mt)

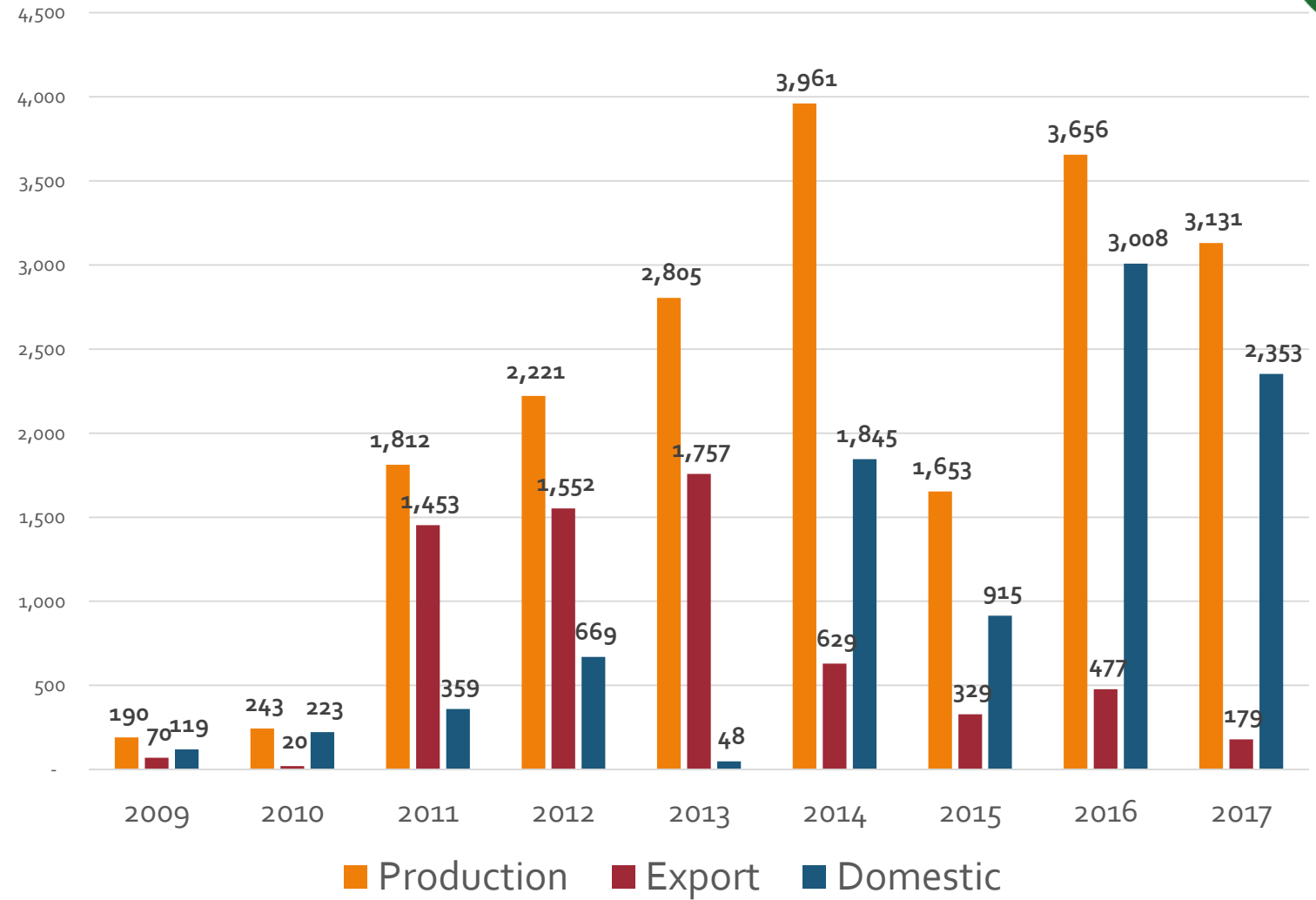
Refineries	Oleochemicals					Biodiesel
	Spilting	Fatty Acids	Fatty Alcohol	Glycerin	Soap Noddle	
50,000	3,350	4,500	2,150	885	1,850	10,000



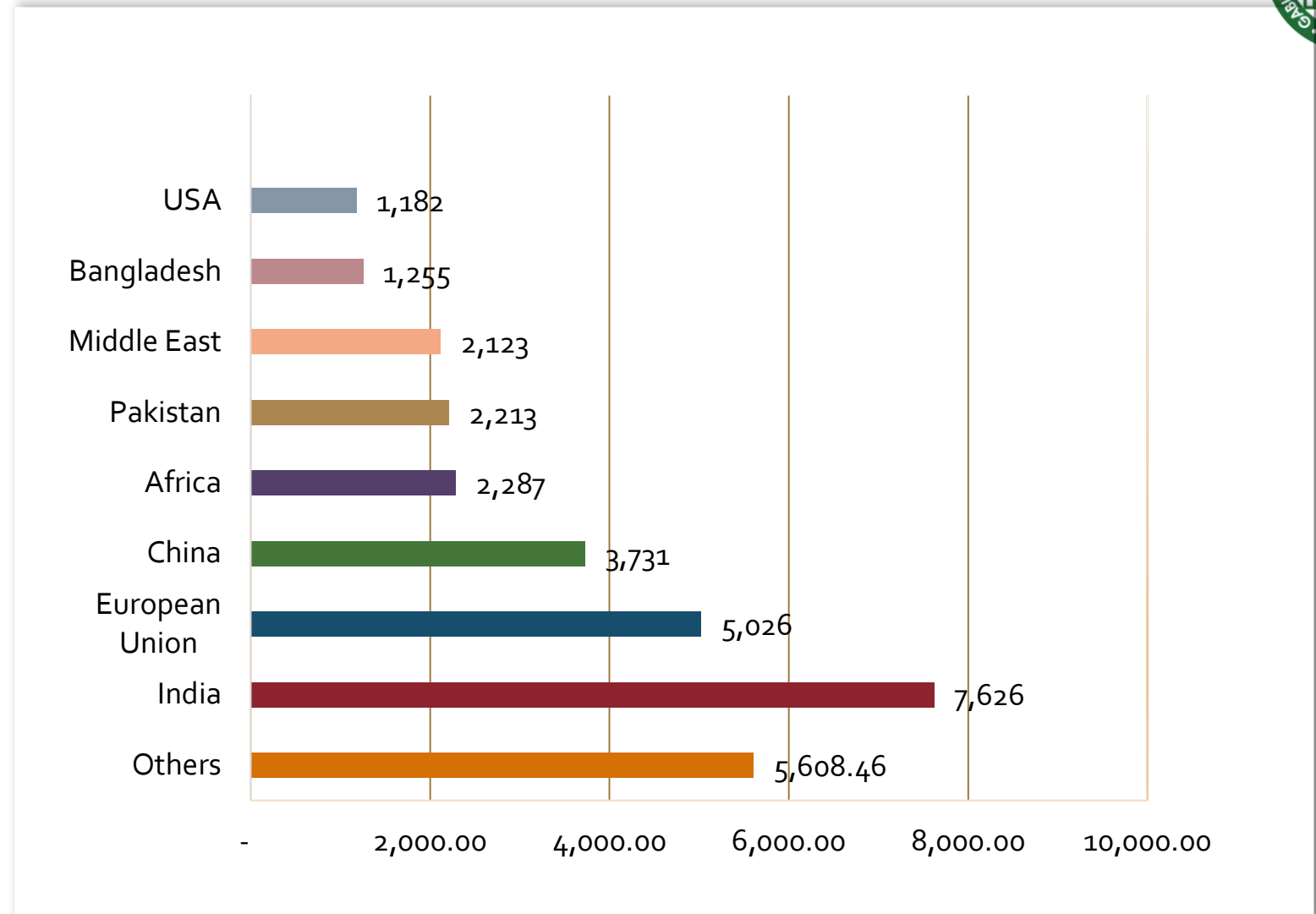
Biodiesel Mandatory Program

Sectors	April 2015	January 2016	January 2020	January 2025
Transportation PSO	15%	20%	30%	30%
Transportation non PSO	15%	20%	30%	30%
Industry and Commercials	15%	20%	30%	30%
Electricity Generator	25%	30%	30%	30%

Indonesia Biodiesel Performance

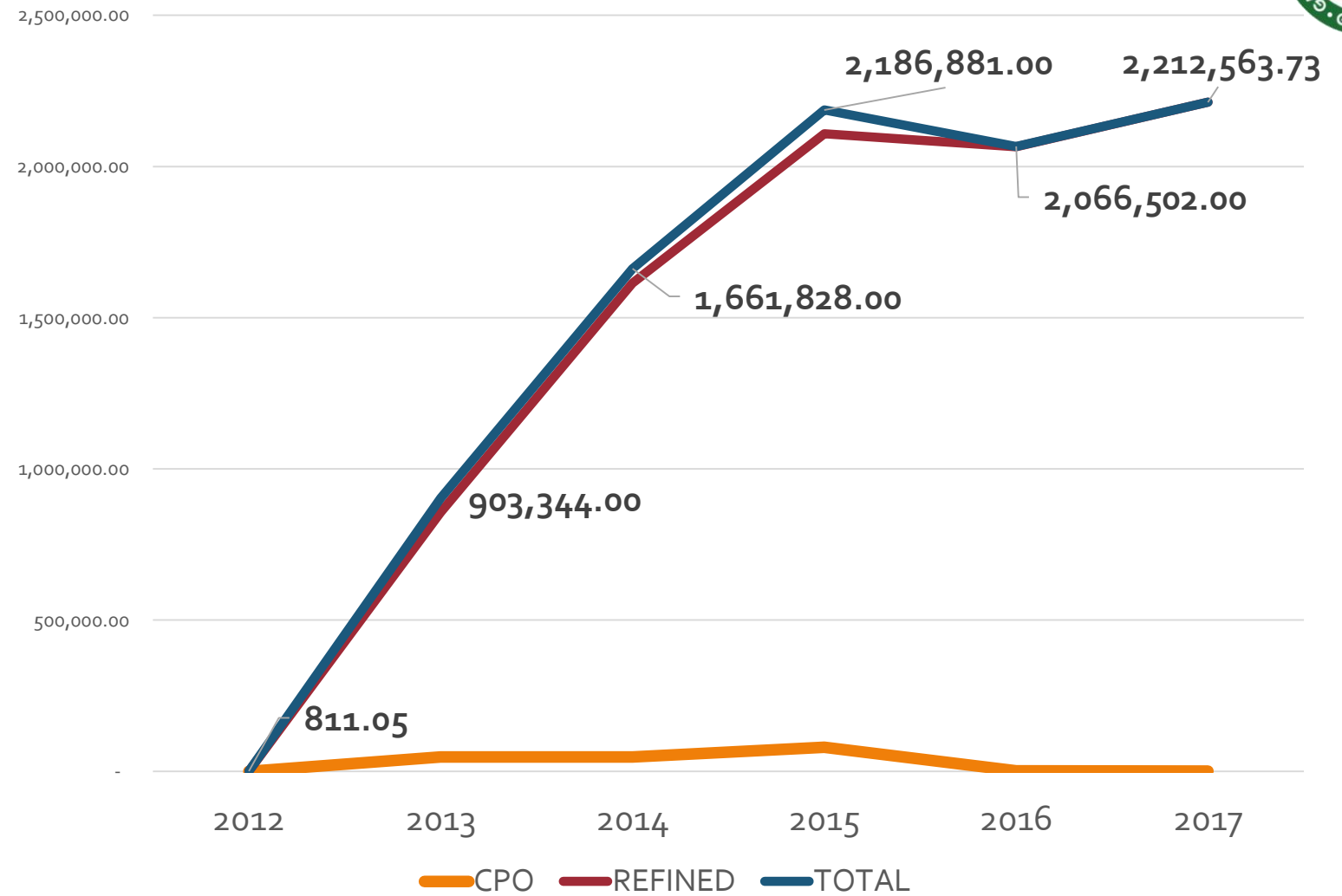


Indonesia Export 2017 (`000 mt)



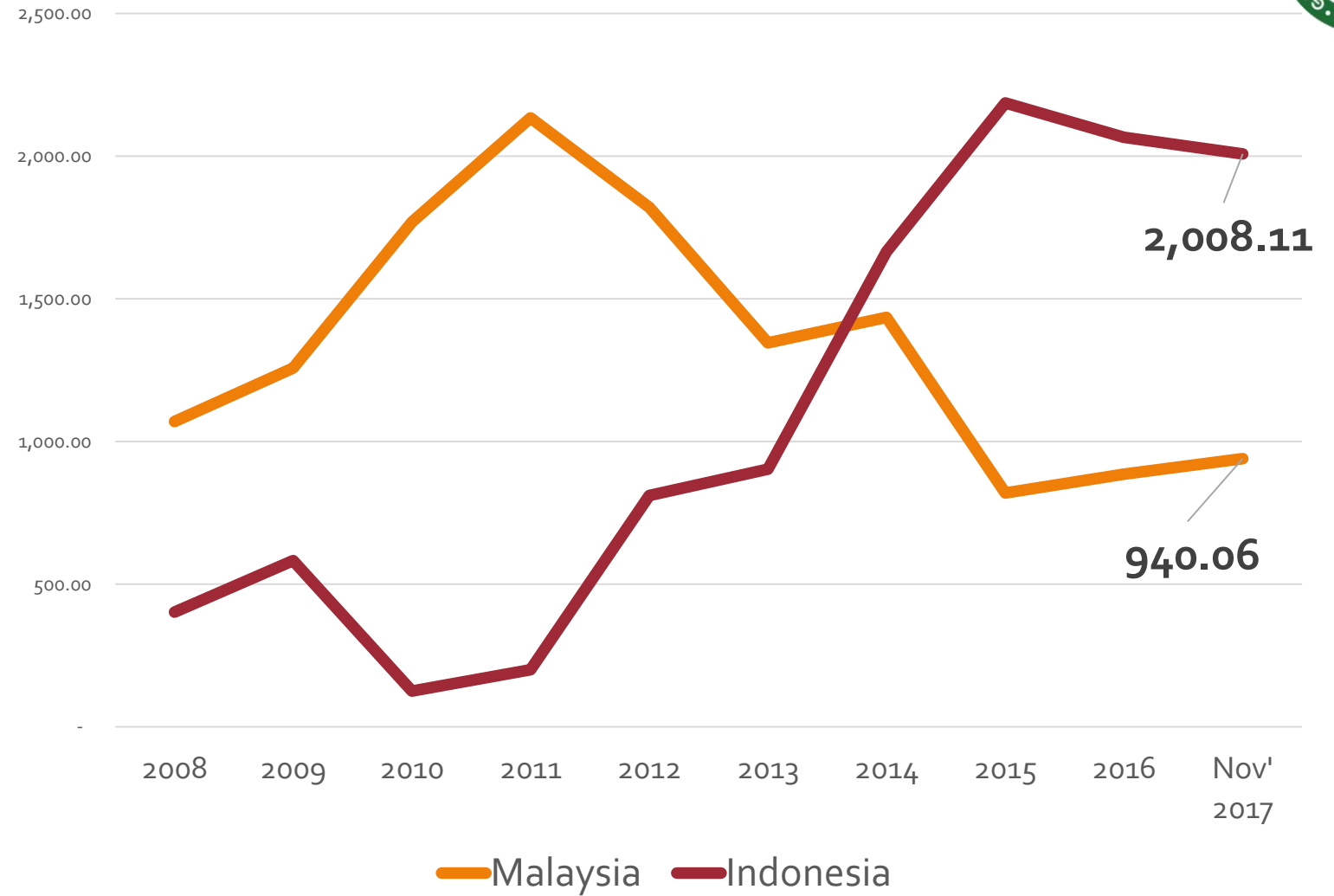


Indonesia Export to Pakistan





Indonesia vs Malaysia Export to Pakistan



Thank you

Gabungan Pengusaha
Kelapa Sawit Indonesia
(GAPKI)

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