

Study on Business Potential and Major Players of TEXTILE FIBER Industry in Indonesia, 2018 – 2022

Textile and Textile Product (TTP) industry is feasibly decided to be a strategic industry since it has greatly contributed towards the state income. After plummeting in previous periods, TTP export in 2017 increased to US\$ 12.4 billion or rose by 4.4% if compared with that in preceded year of US\$ 11.87 billion. Many parties are optimistic that the performance of TTP industry will be bright in line with improving economic growth.

Despite national TTP industry has already been integrated from upstream to downstream and its products have already been known to have good quality in international markets, this industry still faces many challenges internally and externally. Therefore, Ministry of Industry together with other related institutions have maintained synergic cooperation to decide special policies for national TTP industry so it can compete in global markets.

The increasing demand for TTP products surely jacks up the demand for upstream textile industry in the form of textile fiber industry particularly polyester fiber and viscose rayon fiber so their import increases. To reduce the dependency on import, some producers of synthetic fiber keep on raising their production capacity from 1.2 million tons in 2015 to 1.3 million tons in 2017 with fantastic investment. PT. Asia Pacific Fibers spent an investment of Rp. 400 billion to escalate its production capacity from 148,000 tons to 198,000 tons by revitalizing its two plants in Semarang and Karawang; INDORAMA Group also spent an investment of US\$ 500 million; PT Tifico Fiber Indonesia spent an investment of US\$ 14.4 million to regenerate its machinery and other infrastructures.

Based on the research of CDMI that the import of Polyester Staple Fiber (PSF) of Indonesia in the last five years (2013 – 2017) had fluctuated. In 2013 PSF import

was 134,143 tons valued US\$ 241.09 million and its import rose to 153,376 tons valued US\$ 171.69 million in 2017. Similarly, PSF export in 2013 reached 68,799 tons valued US\$ 104.57 million escalated rapidly to 145,392 tons valued US\$ 152.36 million in 2017.

Meanwhile, the condition of other synthetic fibers such as Viscose Rayon Staple Fiber (VRSF) seems to be better. Three companies controlling this fiber business such as PT. South Pacific Viscose, PT. Indo Bharat Rayon and PT. Rayon Utama Makmur had increased their production due to high demand for this product. The existence of new company PT. Saveri Viscose International with production capacity of 350,000 tons makes this business to be more lustroously.

Viewing great potential of textile fiber business in Indonesia, PT. CDMI is attracted to perform a deeper research for three months and finally succeeded in publishing it in a study book with the title of "Study on Business Potential and Major Players of TEXTILE FIBER Industry in Indonesia, 2018 – 2022".

This book is only available in PT. CDMI and it can be ordered directly to our marketing division with Mrs. Tina by phones: (6221) 3193-0108, 3193-0109, 3193-0070, or Fax: (6221) 3193-0102 or e-mail: marketing@cdmione.com at a price of Rp. 8,500,000.- for Indonesian Edition; Rp. 9,000,000.- for English Edition and US\$ 750 for overseas price.

Having submitted this offer, we thank you for your cooperation and look forward to hearing your response promptly.

Cordially yours,
P.T. CDMI

Muslim M. Amin



CDMI CONSULTING
Research Company

Order Form

P.T. CENTRAL DATA MEDIATAMA INDONESIA AGP Building, 2 nd Floor Jl. Pegangsaan Timur No. 1 Cikini Jakarta 10320, Indonesia		Phones : (021) 3193 0108 – 9, 3193 0070 Fax : (021) 3193 0102 E-mail : marketing@cdmione.com Website : www.cdmione.com		
Please send us	:	Study on Business Potential and Major Players of TEXTILE FIBER Industry in Indonesia, 2018 – 2022		
Name (Mr/Mrs/Ms)	:	Position	:	
Name of Company	:			
Address	:			
Telephone/Fax	:	Date	: / /	
E-mail	:	Signature	:	
Please, tick	<input checked="" type="checkbox"/>	Price :	<input type="checkbox"/> Rp. 8,500,000.- (Indonesian Edition) / <input type="checkbox"/> Rp. 9,000,000.- (English Edition) <input type="checkbox"/> US\$ 750 Overseas Price	
<input type="checkbox"/> Telegraphic Transfer (TT)		<input type="checkbox"/> Invoice us	<input type="checkbox"/> Indonesian Edition	<input type="checkbox"/> English Edition
Note: Overseas is added delivery cost				

3.1.7.	Projection of Consumption	41
3.1.8.	Projection of Local and Export Markets	44
3.1.	Viscose Rayon Staple Fiber (VRSF).....	44
3.2.1.	Production Process	45
3.2.2.	Producers and Capacity	48
3.2.2.1.	PT South Pacific Viscose (SPV)	49
3.2.2.2.	PT Indo Bharat Rayon	50
3.2.2.3.	PT. Rayon Utama Makmur	51
3.2.3.	Investment Interest in VRSF Industry	52
3.2.4.	Development of Production	52
3.2.5.	Development of Import	53
3.2.5.1.	Import by Types	53
3.2.5.2.	Import by Country of Origin	54
3.2.6.	Development of Export	55
3.2.6.1.	Export by Types	56
3.2.6.2.	Export by Country of Origin	57
3.2.7.	Development of Consumption	60
3.2.7.1.	Demand of 100% Rayon Yarn Spinning Industry.....	61
3.2.7.2.	Consumption of 100% R Yarn Industry	62
3.2.7.3.	Demand of T/R Yarn Industry	63
3.2.7.4.	Total VRSF Consumption.....	65
3.2.7.5.	Total Local and Export Markets	66
3.2.8.	Projection of Consumption	66
3.2.9.	Projection of Local and Export Markets	67
3.2.	Acrylic Staple Fibre	67
3.3.1.	Production Process	67
3.3.2.	Description of Product	69
3.3.3.	Producers and Their Capacity	69
3.3.4.	Development of Production	69
3.3.5.	Development of Import	70
3.3.5.1.	Import of Acrylic Fiber by Types	70
3.3.5.2.	Import by Country of Origin	70
3.3.6.	Development of Export	72
3.3.6.1.	Export by Type	72
3.3.6.2.	Export by Destination Country.....	73
3.3.7.	Development of Consumption	73
3.3.7.1.	Consumption of Acrylic Yarn Industry	74
3.3.7.2.	Consumption of Carpet Industry and Others.....	75

3.3.7.3.	Total Local and Export Markets	76
3.3.7.4.	Projection of Consumption.....	77
3.4.	Nylon Staple Fiber.....	77
3.4.1.	Development of Production	79
3.4.2.	Development of NSF Import.....	79
3.4.2.1.	Import by Types	80
3.4.2.2.	Import by Country of Origin	80
3.4.3.	Development of Export	82
3.4.4.	Development of Consumption	82
3.4.5.	Total Consumption of Synthetic Fiber	83
3.4.6.	Total Projection of Synthetic Fiber Consumption	83
4.	NATURAL FIBER	84
4.1.	Cotton.....	84
4.1.1.	Description of Product.....	84
4.1.2.	Development of Cotton Production	86
4.1.3.	Development of Import	88
4.1.3.1.	Cotton Import by Country of Origin	90
4.1.4.	Development of Export	94
4.1.4.1.	Cotton Export by Destination Country.....	95
4.1.5.	Development of Consumption	98
4.1.5.1.	Production of Spun Cotton Yarn 100%	101
4.1.5.2.	Cotton Need by Spinning Industries	101
4.1.5.3.	Total Local and Export Markets	102
4.1.6.	Projection of Consumption	103
4.2.	Wool Fiber.....	104
4.2.1.	Producers and Their Capacity	105
4.2.2.	Development of Production	106
4.2.3.	Development of Import	106
4.2.4.	Development of Export	107
4.2.5.	Development of Consumption	107
4.3.	Jute Fiber.....	107
4.3.1.	Producers and Their Capacity	107
4.4.	Silk	108
4.5.	Consumption of Natural Fibers.....	108

5. TOTAL FIBER CONSUMPTION.....109

6. TOTAL FIBER PROJECTION.....110

7. GOVERNMENT POLICIES.....111

8. INVESTMENT OPPORTUNITY.....113

9. CONCLUSION AND SUGGESTION.....115

