Indonesian Women’s Fashion

The Inspiration of New Style

Ministry of Trade of the Republic of Indonesia
Handbook of Commodity Profile

"Indonesian Women’s Fashion: The Inspiration of New Style"

is developed as part of national efforts to create mutual beneficial economic cooperation and partnership between Indonesia and world communities.

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Cetakan Pertama
Introduction

The Trade Research and Development Agency is constantly making efforts to collect, analyze and present information on various products manufactured in Indonesia through printed media, and here we proudly present information on the fashion industry of Indonesia.

The Women's Fashion book gives useful and relevant information about women fashion products and creative industry initiated by Fashion designers who dedicate their expertise and craftsmanship for the Fashion development. The designers' creativities contribute and give big influence not only to the women Fashion world itself but also to the global trade.

This book will discuss about Women's Fashion development in Indonesia and the Indonesian designers’ efforts to enter the international fashion world. The reader will enjoy reading the historical development of Indonesian Women's Fashion, which is highlighted from 1960s to date. More interestingly, people will get the knowledge on some traditional cloths and basic materials used by the designers who have introduced a new approach in combining Indonesian elements with international-style fashion design.

The book will also give a picture on Indonesian ready-to-wear products which are produced by the garment manufacturers, ranging from small, medium and big manufacturers. The Indonesian garment industry has developed to a more mature stage and has entered the world markets. Data will be presented to picture out its development.

We hope that the readers will find this book informative and enjoyable.

Muchtar
Head
Trade Research and Development Agency (TREDA)
Message

It is our honor to share with you the information on the Indonesian fashion designers’ merchandises, one of the special types of numerous lines of Indonesian creative products. Indonesia’s rich cultural beauty is reflected in the creation of the designers’ fashion that blend various cultural touches. The creativity of Indonesian designers has enriched the conventional world of fashion.

Over the last five decades since the growth of the textile industry, Indonesian designers have started to take part in creating fashion designs for local consumption. And, with the increasing awareness of Indonesian cultural heritage, Indonesian designers search out new inspiration by utilizing more traditional aspects in their cuts and designs, including the use of traditional Batik and hand woven cloths from different provinces.

In the past, the fashion may not be considered as an important industry, however with more professional management in the production and business method it is now counted up more as the new industrial business which brings revenue to the country. Indonesian fashion designers have made substantial inroads into the international market by working with partners who have good understanding of the fashion industry in achieving maximum benefits with more economical costs.

The Indonesian Government and designers’ associations work collaboratively with private sectors to boost up the fashion business by organizing exhibition, trade mission, design competition and other business events. Some of the senior designers have had mature business and play important role in the export of fashion garments. This booklet is presented to the readers who are interested in exploring the richness and economic potentials of Indonesian women fashion.

Mari Elka Pangestu
In the Land of 1
Fashion Beauty

Fashioning an Industry: 5
The Boutiques and the Designers

The Garment Industry: 15
Manufacturing Fashion for the Masses
Supportive Environment for the Fashion World

The Trade of Women's Fashion
In the Land of Fashion Beauty

Fashion is any mode of dressing or adornment that is popular during a particular time or in a particular place. The term fashion is frequently used in a positive sense, as a synonym for glamour, beauty and style. It changes from one period to the next, from generation to generation, serves as a reflection of social and economic status, a function that explains the popularity of many styles throughout costume history. Fashion increasingly became a profitable, international industry as a result of the rise of world-renowned fashion houses and fashion magazines.

Trends and season of fashion are mostly driven by the fashion designers who create and produce clothing articles. In this book the term Women Fashion will be used in a business sense which relates to fashionable clothes or garments as the creative industry created and produced by fashion designers and business sectors. No one denies that the work of fashion designers have big contribution to the ready-to-wear garment industry, as nowadays the garment industrialists would need to use the designers’ expertise to catch up with the world’s fashion trends.

Our data show that Fashion has been one of the biggest parts in the Indonesia’s creative sector, presently comprises around 2.5 million companies, 1.3 million of which are in fashion, 900,000 in craft, 200,000 in graphic design and some 25,000 in other areas.

From 2002 to 2006, the creative sector contributed an average 6.3 percent of the national GDP, equivalent to around Rp 104.68 trillion, absorbing some 5.4 million workers and ranked fifth among the Indonesia’s top export commodities. Creative industry exports were worth an average Rp 70 trillion over the same period, with a peak in 2006 of Rp 81.5 trillion. It is predicted that creative exports would increase in line with national export growth targets, between 10 and 15 percent. Of all Indonesia’s creative industries, fashion goods contributed the most to the export figures, with annual growth of around 30 percent.

This book will discuss particularly about women’s fashion, however the garment manufactures will also be discussed to see the picture of the two products in Indonesia.
THE HISTORY OF FASHION IN INDONESIA

Historically, since 700 to 1000 BC, textile and cloth had been documented as one of the important product bartered or traded among the nations and kingdoms in South East Asia. As an example, the Kingdom of Sriwijaya (Palembang) traded its natural resources for the Chinese silk and pottery, and with India, they traded for cotton. The business relations had been very importantly noted in the development of textile and costumes in Indonesia, Malaysia and the surroundings. In the later time of the history, Indonesian textile and costumes were very much influenced by the European culture and trends of the Dutch Colonial.

Fashion in Indonesia has developed well in recent history. Since the appearance of Non Kawilarang and Peter Sie, in the 1960s, Indonesia’s fashion world has demonstrated the potential of its vast pool of talent. In its early development the Indonesian Fashion were tended to emulate the western styles both the materials used as well as the designs. While Indonesian older people generally were more comfortable with traditional costumes, especially for attending special events, the younger people more commonly wore the western styles. Since then the traditional costumes harmoniously subsisted well together with the western style designs until today.

The 1970s appearance of Iwan Tirta, Harry Dharsono, Prajudi, Poppy Dharsono and Ramli had marked Indonesia in the international world fashion through their creation and fashion parades
at home as well as overseas. In the following decade Indonesia's fashion world recorded greater progress.

The efforts and hard works of the young designers were supported by “Femina”, the new women's magazine that began publishing in 1972, which pays a lot of serious attention to the fashion world by presenting world’s fashion news and trend, providing a broader spectrum to the national fashion at this era. Pia Alisjahbana the influential women who managed the magazine initiated the first Annual Fashion Designer Competition in 1979. The event became a landmark, producing many young talented fashion designers winners, such as Samuel Wattimena, Chossy Latu, Carmanita, Edward Hutabarat, and Stephanus Hamy, adding up to the existing list of designers such as Arthur Harland, Susan Budiarjo, Thomas Sigar, Dandy Burhan, Adrianto Halim, Corrie Kastubi, Ghea Panggabean, Biyan, Raizal Rais and Itang Yunaz.

Their names established a historical point of departure for the development of Indonesia's fashion industry. In that era, substantial opportunities for fashion designers to develop was provided by the Indonesian Government. Ministry of Trade, for example, involved them in international exhibitions, trade fair, trade missions as well as cultural missions, particularly in leading fashion countries like the United States, European countries and Australia.

In the 1990s when the globalization issues and the vast development of advance media technology such as the internet, the easy access to world fashion news and trends had helped the designers in creating more variety of fashion especially the glamorous western style. For example Sebastian Gunawan, who introduced the ball gown with rich beautiful beads and crystal, became famous and this brought positive inspiration to other designers such as Biyan, Arantxa Adi, Adjie Notonegoro and Eddy Betty. Up till now, beads and crystal as fashion accessories are still favored in Indonesia.

In 2000s more new names added up to the long list of Indonesian talented designers who has her or his own characteristics and independent styles such as Adrian Gan, Obin, Kiata Kwanda, Sally Koeswanto, Tri Handoko and Irsan. While others create western style designs, Edward Hutabarat and Anne Avantie dedicate their creations to the traditional costume ‘Kebaya Blouse” with modern touch and accessories. All have made the Indonesian traditional costumes reborn among the youngsters and those who appreciate traditional art.
INDONESIAN FASHION
The Boutiques and the Fashioning an Industry: Designers

Traditional Cloths for Fashion

Besides using modern textiles, Indonesian young designers have been inspired by the cultural heritage which reflected through local traditional cloths and fabrics such as:

- **Batik**: Waxed hand drawn or printed intricate design cloth mostly from Java and also found in other particular parts of Indonesia such as Sumatra, Kalimantan, Sulawesi, Bali, West Nusa Tenggara and Papua.
- **Songket**: Classic golden thread woven cloth from Sumatra, Sulawesi, Bali, Lombok and Sumbawa. It is hand-woven in silk or cotton, and intricately patterned with gold or silver threads. The metallic threads stand out against the background cloth to create a shimmering effect.
- **Tenun Ikat**: Woven tied dyed cloth from all parts of Indonesia like West Kalimantan, East Kalimantan, South Kalimantan, North Sumatra, West Sumatra, South Sumatra, East and West Nusa Tenggara, South Sulawesi, Maluku, Lampung, Bali, West, Central and East Java.

Common fabrics used in traditional cloths are mostly natural fiber, cotton and silk. The phenomena have been very positive as they empower the local people in the regions to revive the cultural heritage. The Indonesian government has been conducting some programs to help people in every provinces in reviving the cultural heritage, including the production of local fabrics.

Take as an example; woven tied dyed cloth from Sintang District is one of many cloths which inherited by the ancestors of Dayak people in West Kalimantan. The raw materials and the coloring of this beautiful woven cloth come from the natural source of Kalimantan rain forest.

To enrich the appearance and the style exclusively and glamorously, the Fashion designers variety of clothes’ supporting materials and ornaments, which are seasonal and changing along with the change of the fashion itself. Nowadays the designers decorate their fashion with many kinds of natural and man-made gem stone, beads, embroidery thread, lace and ribbons. Some of these supporting materials and ornaments are produced locally but some are imported.
Women’s Fashion in Jakarta

Jakarta being the Capital City of Indonesia is a Fashion City, a central place where top designers’ collections are produced and offered. Haute couture as well as ready-to-wear clothes are available in this city, either in the Designer’s Houses, Boutiques or in the luxurious malls. Jakarta has become the center of business. Once young models, artists or designers start to become famous, they would move to Jakarta, the place to go for young, aspiring designers from the provinces to make further endeavor.

The size of production of the haute couture or high quality and exclusive gowns is not yet large enough as compared to the garment ready-to-wear industry, due to the fact that the products are consumed merely by selected people, who are financially strong and top celebrities. Many of the designers have worked together with conglomerates and industrialists in order to manifest their intricate designs through the production of ready-to-wear fashion with modern factory process.

Along with the local comeback of elegant gowns, however, traditional clothes like kebaya (blouse) and sarong continue to hold their own as many women still choose them for special occasions. The Wastraprema, a group of traditional clothing enthusiasts, has invited several designers to give fresh look to traditional attire with new patterns, while processing textile of this type into modern wear.

Top designers operating their Fashion Houses and Boutiques in Jakarta are among others:

- **Peter Sie**, the first Indonesian designer who formally studies fashion design since 1950. With his fashion training obtained in the Netherlands, his designs are distinctly western in style.

- **Iwan Tirta** began his career as a designer in the 1970s and can rightfully be called the pioneer in changing the image of batik. Iwan Tirta’s Batik fashions are designed for many occasions such as formal, office wear, casual wear, as well as for exclusive gifts. Iwan Tirta is successful to combine the west and the East, even the designs originated from the traditional sarong with tube form, he admitted that he used the technology from the West. Pierre Balmain, the famous western designer had ever asked him if he could copy the idea of sarong that Iwan Tirta designed.

- **Poppy Darsono** is a talented and dedicated fashion designer who had successfully built her fashion business in 1977, initially for au couture, but later in 1980 she started setting up business for ready-to-wear garment. Her ambition to develop the Indonesian fashion had drove her to found the Indonesian Fashion Designer and Entrepreneur Association (APPMI) and she has also been active in other organizations such as the Association of Indonesian Garment and Accessories Suppliers (APGAI) and the Indonesian Chamber Of commerce. Although she
has 20 years experience in exporting jeans and fashion garments to the United States and Germany, under the trademark of Ramasankara, as a designer she still focuses her attention on the domestic market and concentrate on the local fashion sector.

- **Samuel Watimena** started his career in 1979 when he became the first winner of Fashion Designer Competition in Jakarta. Local ethnic materials have always inspired him in his designs, especially the Indonesian traditional woven and tied dye cloths made of cotton and silk. Since 1985 Samuel has been empowering people to revitalize traditional woven and tied dye cloths in Tanimbar (Maluku), West Timor, Sumbawa and South Sulawesi (Makasar). In his early career he was focusing his designs to stage costumes for artists and celebrities; however, he is now focusing his business on ready-to-wear garments. Some of his ethnic-influenced ready-to-wear designs are sold in some department stores in Jakarta and other big cities.

- **Obin** is part of the new generation of batik designers using soft color motifs on textured woven cloth. Her works are popular among women not only because of their novelty value but because they have liberated them from the conventional dictates about wearing batik cloth. With her designs, women are free to wear batik by simply tying it around the body, leaving their hair flowing freely and giving a more relaxed impression to the fabric. She has been exporting her products to Japan and she owns boutiques in downtown Tokyo and Nagoya.

- **Ghea Sukarya Panggabean**, whose motto is a style with a difference, creates designs blended with ethnic scene, especially the materials she uses. Ghea is long considered Indonesia’s top talent in exposing ethnic art as main them of their fashion collections. She has made good achievement by maintaining her ASEAN markets, particularly to Singapore and Malaysia. Most often, she sends orchid designs with the styling of embroidered kebaya (a woman’s blouse with the front pinned together), batik gowns, batik scarves and embroidered items in the ready-to-wear style. In Singapore her collection is represented by government-owned MJ Joaquim Boutiques in Liat Towers and The Millenia Walk, while in Malaysia, Ghea has cooperated with The Aseana Boutique on the first floor of Surya KLCC.

- **Carmenita**, is a rare combination of strong business woman and talented artist, this has brought Carmanita at the top of the Indonesian fashion industry with her trademark batik on lycra fashion items. Her garments are sold in Europe, Japan and Malaysia and have appeared on Fashion TV and CNN Asia, Carmanita’s influence in the fashion world extends well beyond the catwalks. Prestigious hotels such as the Hilton in Bali are adorned with her fabrics and designs, as were the 1997 Southeast Asian Games—16,000 uniforms worn by umpires, participants and chairmen alike were designed and made by her company.
Ramli has been on the fashion business for 34 active years in Jakarta. His creation varies from casual, evening, Moslem wear and traditional kebaya dresses, as well as creations made out of songket traditional embroidery.

Edward Hutabarat is long known for his passionate approach to kebaya (traditional blouse) dresses. It was him who started kebaya mania in 1996. Almost all local designers then adopted the kebaya dress and its modifications. While many other designers turned to the West for their influences, Edward stayed true to the kebaya, but revived for modern times. His success is attributable to the glamorous presentation of the blouse: laced and brocaded with tiny ornamental roses it is feminine and beautiful. His presence is important in Indonesian fashion because he continues to stimulate Indonesian women to wear the traditional blouse despite the overwhelming saturation of evening gowns in the market. He explored new styles of the kebaya coupled with various traditional woven textiles from East Nusa Tenggara, Palembang in South Sumatra, Bali, Makassar and North Sumatra.

Biyan, has introduced a new approach to a dress for Indonesian women, marrying oriental elements with international-style fashion design. This “East Meet West” finds expression in gowns marked by touches of craftsmanship, long known as the trademark of Asian fashion. The ultra femininity of chiffon dresses with tiny embroidered ornaments and beads have made them popular among women in Jakarta and Singapore, one of the places where
he markets his works. He has established a synergy with larger companies, and has been doing in the last few years with his XML trademark.

- **Oscar Lawalata**, started his career in 1998 inspired by the Indonesia’s rich and diverse cultural beauty. Being the winner of the International Young Creative Entrepreneur (IYCE) Awards 2008-2009 in London, Oscar Lawalata is a respected designer who combines traditional-style garments and textiles, he can make creative talent into a business. He, previously drawn to designing for the teen market, he has now joined the ranks of innovators with gorgeous and sparkling attire, which is crafted exclusively rather than mass produced. Oscar was awarded as winner at the London Fashion Week in February 2009. Besides known for subdued, ethnic-influenced ready-to-wear designs, Oscar also presents modern, beautiful and gleaming fashion collection, with floral-shaped sequined patterns adorned over fine cloth such as chiffon and lace.

- **Didi Budiardjo** is known as an evening dress designer who emphasizes the lines of his dresses and sophisticated patterns. His designs are unique in that, while remaining strongly modern in style; they are influenced by traditional designs found in such areas as Sumatra or Bali. His statement is that evening gowns are suitable wear for Indonesian women and cannot be dismissed as ‘Western’ fashion anymore.

- **Sebastian Gunawan** started to introduce his ball gown designs in mid 1990. Many did not believe that the fashion would ever catch on in the country. But, he persisted and he is now successful in carving out his own niche in the market. Sebastian’s creations are all about luxury, elegance and elaborate techniques, qualities that make him the darling of Indonesia’s high society.
WOMEN’S FASHION IN WEST JAVA

The inhabitants of West Java Province, especially in the City of Bandung, are very fashionable, rich of creativity in fashion designs. Bandung has become the center of fashion, a city of clothing outlets, while in the past it had been called “Paris van Java”, which in the Dutch language means ‘Paris of Java’. Bandung offers not only its Cihampelas local jeans, but also various kinds of stylish fashions. The city’s fashion designers are working to make their names known and increasingly playing a more significant role in defining fashion in the West Java capital, which used to be the center of youth style in the 1960s, before Jakarta took over.

The talented creative workers and designers of Bandung usually have their own creations without linkages to any other brands; they sell the products to local markets through outlets which are visited not only by Indonesian, but also tourists from other countries such as Malaysians, Singaporean and others. E-commerce has become one of the popular marketing tools of these young designers, receiving orders from other young customers.

Local designer group organize Bandung Fashion annually to promote their creations. In 2008 fashion event, for example, a number of designers featured interesting works. Several new names to be reckoned, their emergence comes from their own recognition that they must act to ensure that Bandung becomes a major player in the development of the country’s fashion, instead of being an also-ran behind dominant Jakarta. Given the concepts shown by these designers, Bandung does appear to have its own style and has made its mark through a unique contemporary casual style. Active Bandung fashion designers are among others: Deden Siswanto, Ferry Sunarto, Shierley Wargadidjaja and Malik. Although casual and contemporary designs are dominating the fashion in Bandung, these designers are also creating elegant designs as well. In their designs and cuts, they are inspired by contemporary Western elegant styles and ethnic designs, depending on the fashion trends of the year.

Take Deden for example, finished Intermodel fashion school in Bandung in 1987, went to work as a designer in a company making teen and children’s garments. In the late 1990s, he opened his own business and began to produce garments under the label D2N. He has taken part in a number of fashion parades and contests in Jakarta and other cities. His collection at one of the shows several years ago was broadcasted by international fashion channel FTV, and was chosen as one of the “”Top Ten”” of the show. Deden’s design concept centers on Asian ethnic styles, with feminine and modern touches, as characterized most of Bandung designers.

Distros in Bandung

Many of Indonesia’s fashion industry players in Bandung and other cities have been able to grow their businesses by relying on design power rather than capital strength, as seen in the “distro” phenomenon. Distro (short for distributor outlets) was pioneered by creative professionals from Bandung, West Java. Dendy Darman, a founder of one of the country’s first established distros, “347”, shared
part of his story of starting the business from scratch. The 347 was set up by a surfing community, interested in arts and product design, which pooled their ideas and built their first line of products using no more money than a college student’s monthly allowance. Distro businesses are usually established by communities and have grown big now. The interesting thing is that distros are not competing as rivals; instead they complement each other, because by complimenting to each other they can breed new creativity. The 14-year-old 347 now produces around 200 different t-shirt designs every month, and has 5 stores including two stores in Singapore and Australia, employing a total of 150 people. There are estimated to be around 1,500 distros across Indonesia, managed by the young and creative, some of which have total revenues of up to US$ 100,000 a month.

Distro businesses are resilient because they dare to challenge ideas and can be flexible in managing their finances due to their small size.

WOMEN’S FASHION IN YOGYAKARTA

Since Yogyakarta is known as the center of batik, which is now included on UNESCO’s intangible cultural heritage list, the designers felt compelled to use batik as their main material for the fashion show. The artisans and fashion designers are also using the local woven fabric called “Lurik” in creating their masterworks. Yogyakarta designers organize Fashion parade and exhibitions annually to promote their creations.

Afif Syakur is one of the top Yogyakarta fashion designers. He has actively participated in many exhibitions and parades outside the city, for instance, at the Jakarta Fashion Week 2009. His latest creation and designs were described as traditional meets futurism, the cuts mirrored more traditional looks, yet the fabric choice and metallic sheen were very much reflective of the designer’s leading edge adoption of galactic fashion. His cuts, colors and materials were more focused on the cultural and ethnicity which had resulted exotic creative products.

WOMEN’S FASHION IN BALI

Bali is a place where people find enjoyment of life and beauty of the Balinese people, culture and nature. Art and craftsmanship are grown productively in people’s creations, including fashion and garments. Not only the Balinese people who creatively
manufacture the fashion garment, but foreigners from various nationalities also work together with Balinese manufacturers to produce fashion garment either in small or big factories.

Bali designers organize local shows or even international fashion parades almost every year. In these kinds of occasions, designers from other provinces are bringing in various inspirations to their collections. Although they had different views of the upcoming fashion trend, each of them shares one common mission: exploring Indonesian cultures. Exclusively, designers from Bali, Bandung and Jakarta offer cutting edge fashion and new innovative prints.

To encourage the productivity of the fashion designers and indirectly to boost also garment export, various designer groups have been successfully facilitating trade shows since 2001. Their main motto is to provide their fashion talents with the right platform, so they can emerge on the international scenes. The 8th edition of Bali Fashion Week 2008 was conducted on 24-29 August, 2008. It is one of the most popular fashion events in Asia. The show presented 50 both well-known and rising designers from 35 countries.

HARMONIOUS COLLABORATION

A lot of fashion designers have made successful efforts in exporting their products to several countries overseas, even their sales are not as large as compared to the manufactured garment exporters, who are already matured in producing, marketing and supplying world markets. In accomplishing big orders of fashionable ready-to-wear garments, it is often that the designers work collaboratively with big garment manufacturers, which in this business relation they have common goal to produce high quality and exclusive fashionable garments. However, for the haute-couture clothes the designers would work exclusively by themselves. In the opposite, the garment producers would also work with fashion designers in accomplishing exclusive orders from local or overseas buyers.
Supply of Textile for Garment Industry

The raw materials for garment and ready to wear are mainly available in Indonesia as it is a textile producing country. Over the last five decades, Indonesian textile and textile products industry has grown from a small sector to a major contributor to the country’s total industrial revenue. The country’s government has categorized textiles and clothing as a ‘strategic industrial sector’, playing an important role in the nation’s economic development. The industries are absorbing a great number of workers and giving substantial contribution to the foreign exchange reserves.

Most commonly used types of materials for Indonesian ready-to-wear garment are: Polyamide (nylon), polyester, polyacrylonitriles (acrylics), polyolefin, polyurethanes (spandex, and lycra), knitted cotton, rayon, cotton, polycotton, viscose rayon, linens, leather, suede, corduroy, drill, denim, talon, satin and velvet.

Production Facilities

Labor

Beside the raw material supplies, the large number of Indonesian population not only becomes an asset for labor-based industry growth, but also an opportunity for the growth of science and technology-based industry.

Infrastructure and Industrial Facilities

In addition to huge labor force, in order to facilitate the clothing and textile industry, the Government has been improving the availability of good infrastructure, means and supporting services, such as main roads, ports, transportation, warehouse, energy, clean water supply, telecommunication, industrial land and industrial area, and other supporting services.
GARMENT PRODUCT CENTERS

Textile and textile products including ready-to-wear fashion are produced mainly in West Java, Jakarta Special Region, Banten, Central Java, East Java, Bali, Sumatra and Yogyakarta and West Java:

- West Java: 57%
- Jabodetabek: 17% *(Jakarta, Bogor, Depok, Tangerang and Bekasi)*
- Central Java: 14%
- East Java: 6%
- Bali: 3%
- Sumatra: 2%
- Yogyakarta: 1%

Fashion garment are produced both by small companies as well as big scale industries, either as a component of the whole product range, or as a primary product. Sourcing out is commonly found in the clothing industry, factories produce not only the brand name of their own, but they also receive orders with international designers’ names with international brands, mainly from USA, UK, Japan and Hong Kong.

**Indonesian Clothing Products - SME**

<table>
<thead>
<tr>
<th>Description</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<td>Men Power (People)</td>
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<tr>
<td>Production US $ mil</td>
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<tr>
<td>000 ton</td>
<td>484</td>
<td>511</td>
<td>282</td>
<td>353</td>
<td>238</td>
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</table>

Source: BPS-Statistic Indonesia, Ministry of Trade, Ministry of Industry compiled
The clothing industry is mostly oriented toward export markets, and the table below shows the figures of garment production and export from 2003 to 2007. The export of garment is 88% of total textiles and textile-products (TPT) production.

### Indonesian Clothing Products 2003-2007

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<thead>
<tr>
<th>Description</th>
<th>2004</th>
<th>2005</th>
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<td>Men Power (People)</td>
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<td>Prod. Capacity (000 ton)</td>
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<tr>
<td>Production</td>
<td>US $ mill</td>
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<td></td>
<td>000 ton</td>
<td>516</td>
<td>400</td>
<td>436</td>
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<tr>
<td>Export</td>
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<td>000 ton</td>
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</tr>
</tbody>
</table>

Source: BPS-Statistic Indonesia, Ministry of Trade, Ministry of Industry compiled
Garment Industry in Jakarta

Jakarta, and its surrounding regions, is the second biggest production center after West Java which produces 17% of garment manufacture in the country. Even small and medium enterprises are also found in Jakarta, but most of the Indonesian big garment manufacturers are operating in this area, and usually some of their factories are located in other cities. The products cover all categories like designers’ collection, ready-to-wear or mass product. The major companies operating in Jakarta, which are also garment exporters among the biggest are Caterindo Garment Industry, Progress Beautytex, Inkosindo Sukses, Great Golden Star, Karwell Indonesia and Sainath Industrial, Ungaran Sari Garment, Laxmirani Mitra Garmindo, etc.

Garment Industry in West Java

West Java is the biggest production area in terms of garment, it is about 57% of total garment production is produced in this area, scattered mostly around Bandung and some are in other cities within the province, such as Bandung, Bogor, Sukabumi, Tasik and Tangerang.

The following are some major garment factories and exporters which are operating in West Java excluded Bandung: Anugrah Maju Perkasa, Mulia Utama Embroidery, Bali Nirwana Garment, Busanaremaja Agracipta, Kizone International, Mega Nuansa Asri Pratama, Yulita Busindo, Detta Marina, Hanson Industri Utama, Sarana Kidahi Utama, Ricky Putra Globalindo, Suryapratama International, Wujud Nawangwulan, Trinunggal Komara and many others.

Just in Bandung, the capital of West Java, alone there are so many factories producing ready-to-wear garment and also textiles such as: Novafashion Garment, Asih Perdana Jaya, Catrine Natali Pratama, Muti Garment Jaya, Leading Garment Industries, Namnam Fashion Industry, Masterindo Jaya Abadi, Busana Cemerlang Garment Industries, Dalia Tex Kusuma.
DaliaTex Kusuma acts as one of the materials supplier for Indonesian garment; it is an integrated manufacturer of textiles, quality fabric and fashionable products, founded 1965 in Bandung West Java. It produces garment with high technology using polyester light and medium weight woven fabrics to wrap it in knitted fabrics.

The production capacity is currently 50 million meters of woven fabrics and 10 million meters of warp knitted fabrics are produced each year in a 20 hectare-factory employing 2500 personnel and labors. The product items are 100% polyester, light and medium weight woven fabrics in plain dyed as well as printed, such as Chiremen, Georgette, Back Satin and other fancy items. Warp knitted fabrics such as Tricot, Two-way Tricot, Rachel Lace, etc. The brands are: Silfina, Yess, Tessa, Innova, Tisell, Marino, Comfort, Warp knitted fabrics: Intermoda, Culture, Sovi.

Masterindo Jaya Abadi, a garment factory located in Bandung, West Java, was established in 1988 with more than twenty years of experience. The production capacity reaches up to 240.000 pieces per month with 3000 pieces per style. Their main products are ladies’ blouses, skirts, pants, and dress (casual & soft dressing). They have been doing business with buyers from USA, Europe and other countries under the international brand names of Ann Taylor, Jones New York, Lands End, Liz Claiborne, Bianca, Gerry Weber, Mexx, S. Oliver, and Tom Tailor.

Shafira Laras Persada is under the management of SHAFCO Enterprise which produces Moslem style wear since 1988, more than 20 years of experience. Under the SHAFCO Enterprise the company also produces other conventional fashion garment. In 2009, Shafira owns around 450 showrooms and outlets in 12 cities (Jakarta, Bandung, Surabaya, Makassar, Balikpapan, Samarinda, Banjarmasin, Palembang, Malang, Cirebon, Bogor and Medan, including Penang, Malaysia) and 20 counters in reputable department stores.

With its long experience, Shafira has become one of the Moslem style Fashion trendsetters dominating the middle and upper class market segment. The success has been the result of high quality control done by the company. The other reason is that the employees and designers are committed and innovative in creating their designs. This company adopts modern and professional international networking in order to get international market for Moslem wear, especially in several Moslem countries. They plan to expand their products and sales with the purpose of making the company one of the biggest centers for Muslim style fashion products.
Garment Industry in Bali

Bali’s special attraction has added up to its fashion industry, which actively producing quality fashion products, especially the ready-to-wear, like for instance: Bulan Putri Sembada, Ayu Orchid, Bali Busana, Mitragarment Indoraya, Khrisna Indotekstil, Khrisna Kreasi, Kuchit, Lia, Budi Artha, Clothing Industry Fijar and others.

■ Krishna Kreasi is one among the garment companies in Bali, producing high quality garments since 1985 with the current capacity of 30,000 pieces per month using cotton and rayon.

The owner of the company is the chairman of the Indonesian Textile Association (API) in Bali, who is actively devoting himself in the development of textile business in Bali. He has a lot of awards from the Indonesian Ministry of Trade and also from the European Union. Foreign buyers for the Kreshna Kreasi Fashion products come mainly from the USA and Puerto Rico.

■ The Suicide Glam Company was established in 1999 in Bali and started to produce fashion garment for young people who immediately became known and marketed in 2000 labeled as ‘Suicide Glam’ product. It produces a range of garment products for man, woman and children, including the accessories like handbags, belts and shoes. Most of the products styles tend to be casual glamour and modern using local poplin, cotton, and synthetic leather. This company has already had good markets in Australia and New Zealand, Netherlands, Austria, Columbia, and specifically in Germany the brand name ‘Suicide Glam’ has been produced under franchised business arrangement.
In 2003 Suicide Glam collaboratively worked together with Wuerzburg Store in Germany and in 2005 this company became a regular supplier of several stores in the New South Wales, Australia.

- The Sybra Sira Garment Company was established in 1991 in Jakarta and moved to Bali in 1998 producing women’s and children’s garments. This company exports mainly to the United States of America and Australia, amounting to 10,000 pieces per month. A blend of Javanese and Balinese Batik is dominating the design of rayon fabric used in its fashion garments. The success of this company’s export is grounded by the exclusive design of the batik used, which really meets the western buyers’ tastes and specifications.

- Dianatina Ayu was established in 1985 manufacturing ladies garments using local knitted and jersey fabrics with capacity of around 35,000 pieces per month. Main importers of the products are Jerman, USA and Australia.

- Pacific Express, a part of the Pacific Garment Company, was founded in 1984 as a division specializing in the production and export of garment for male and female, with the capacity of 120,000 pieces per month for exports to USA, Europe, Italy, Spain, UK, Australia and Japan. In providing business services to the buyers, the company employs around 280 people permanently and 1,200 freelance workers. In the production process, the company performs a good quality control in almost every aspects like fabric quality, pattern cutting, sewing, embroidery, beading, batik process, ironing and packaging. To meet the buyer’s demands of quality fashion garment, all of the garments are designed by professional designers in order to provide the best product and services. For summer and winter casuats, the choices of fabrics include rayon, cotton, knitted cotton, decorated with batik ornamental designs, embroidery and beading.

All of the successes achieved by designers and garment producers are because of the supports provided by the government and the private sectors such as the Ministry of Trade, Ministry of Industry, State Universities, State Banks, Chamber of Commerce, associations, women magazines etc.
INDONESIAN WOMEN FASHION

Taken on Jakarta Fashion Week 2009
Supportive Environment for the Fashion World

Economic development and people's income may not become the only factors influencing the development of garment and fashion, but there are more important factors having great influence such as the organizational, social and cultural transformation, the international trade, the urban development, the media involvement and entertain business development. Supports have been provided by both the Indonesian Government and the private sectors.

THE GOVERNMENT

National Agency for Export Development of The Ministry of Trade has been facilitating the women's fashion and garment exporters to promote and expand their markets by participating in trade fairs and exhibitions in country and overseas. The Agency also provides the exporters with market intelligent and trade information gathered by the Indonesian Trade Promotion Centers operating in several big cities around the globe.

Ministry of Industry fully supports the garment industry and has offered a 10% interest discount as an incentive for investments in the revitalization of textile machinery. The textile industry in Indonesia is a mature industry that is proved by both domestic and global demands of textiles.

State banks offers loan for small and medium enterprise to help them cope with the financial needs of the business.

The Textile Museum is located in Jakarta close to the oldest and biggest textile market in South East Asia displays traditional kain (fabric) collections from various regions in Indonesia. The spacious room of the museum displays a wide variety of fabric from different parts of Indonesia, each labeled with information on their origins, types of material, production processes and purposes of use.

Most of the collection of traditional cloths or fabrics aged of hundreds of years and have become the scarcity antiques collection. Principally, the collections kept in this Museum are decorated fabric
associated to textile world, especially textile from within the national territory. The collections are divided into several groups, namely:

- a. Kain tenun (woven cloth) collection group
- b. Kain batik (Batik cloths) collection group
- c. Mixed collection group.

The museum has become one of the places where the Indonesian designers get inspiration of the cultural heritage in the form of cloths, the basic materials for making clothes.

UNIVERSITIES AND SCHOOL

In modern Indonesia, a lot of opportunities offered to young generation for special studies in various fields of expertise including fashion design, so that more and more fashion designers graduated from universities and colleges in the country as well as overseas.

Two fashion schools in Jakarta are ESMOD of the International Fashion University Group, an international school and another one is La Salle. Esmod Jakarta was established on September 6, 1996 upholding a rigorous professional international standard and encourages Indonesian young designers to adapt to the rich cultural heritage of Indonesian culture. Many local modeling schools operated in Indonesian big cities are playing important role too in promoting and encouraging people towards fashion.

Other important education institutions include:

- **Bandung Institute of Technology**'s (ITB) Art and Design Department is one of the oldest academic facilities for Indonesian young people who want to develop their talent and creativities with intellectual knowledge about art and designs.

- **Jakarta National University** (Universitas Nasional Jakarta) has a Faculty of Fashion and Design to facilitate Indonesian young people who want to become Fashion designers or instructors.

- **College for Textile Technology**
  The institute was originally founded in 1922 which in Dutch language was called as the ‘Textiel Inrichting Bandoeng’ (Bandung Textile Center) and after a long history of its development, in 1981 the institute, which is under the administration of the Indonesia Ministry of Industry was then divided into two independent institutions: The College for Textile Technology (Sekolah Tinggi Teknologi Tekstil) and The Center of Textile (Balai Besar Tekstil). Since the beginning of the emergence of the textile industry in 1960, this College has become an important educational element in supporting Indonesian textile industry. Many graduates of this college have become experts and given valuable contribution to the development of Indonesian textile industry until today.
INDUSTRY GROUPS

- **Indonesia Textile Association (API)**
  
  The Indonesia Textile Association or Asosiasi Pertekstilan Indonesia (API) Deputy Chairman, Ade Sudrajat Usman stated that the textile industry in Indonesia is a mature industry that is supported by both domestic and global demands for textile to keep up with population growth. Their supports for the Fashion and garment industry are among others through the exhibitions, seminar and other trade vents, providing data and information center of textile and garment international trade.

- **Chamber of Commerce**
  
  The Indonesian Chamber of Commerce (KADIN) is taking part in developing fashion industry which is part of the Textile and Textile Product industry.

  The KADIN vision and road map, which were formulated to guide the development of Indonesia’s private sector, says that by 2030, exports of textile products could reach a staggering US$75.33 billion and account for about 5% of the world export market. The chief researcher for KADIN's industry road map stated that the textile industry has always been the biggest contributor to our non-oil and gas exports. This has been due to strong global demand for its products and its excellent reputation.

- **Indonesian Fashion Associations**
  
  To fulfill the designers’ continuous needs of information on latest development of their field and ways to socialize with their professional colleagues, two professional organizations at the national level have been established to meet these needs, while they also work together to create networks locally and internationally. The first is the Indonesian Fashion Designers Association (IPMI) and the second is the Association of the Indonesian Fashion Designing Entrepreneurs (APPMI). Both organize fashion parades, trend shows, exhibitions and competitions as their annual agenda, proving their responsibilities for the development of fashion in the country.

  These activities are considered as one of the efforts of showing their support to the fashion world, presenting the creations of their members. One of the fashion parade’s themes in 2008 for example was to revive and conserve the Indonesian tied dyed woven cloths which are often used by the Indonesian fashion designers. Conservation and development
of the traditional fabric and cloth has been the commitment of the members of the association all over Indonesia.

The organizations are making efforts to encourage the creativity and talent of local designers to the whole world to see, so this can motivate them in their interactions with international trade.

WOMEN’S MAGAZINES

By 2009, there are hundreds of women’s magazines published in the country, promoting new fashion designs, trend and important events to the readers all over Indonesia, by disseminating news and messages about Fashion.

One of the fashion magazines is the Femina Group, a fashion and lifestyle publication company in Indonesia. With a history of thirty-five years, Femina group has become the forerunner in building and dominating various augments of the national media market especially for the A & B consumer class with a total readership exceeding two million. The group has been a supporter of the Indonesian fashion industry in the form of magazine editorials and the development of emerging talents through various competitions including Fashion Designers Competition and Concours International Des Jeunes Creature de Mode.

In addition to those Indonesian women’s magazines, some of the translated editions of foreign magazines such as Cosmopolitan, Elle, Harper’s Bazaar, etc. are published in the country promoting western fashion, which enrich the designers’ creativities and becomes the promotion tools for fashion.

PROMOTION FACILITIES

Vast growing property business sectors which for the last decade have been building a lot of trade centers, shopping malls, hyper marts and department stores give good impacts on the development of Fashion. This sector does not only build the space for display and business transaction, but they develop various programs for fashion parade, exhibition and convention facilities for business transaction or other events. These facilitate the designers and garment producers to introduce, promote and market their products in a more practical, economical and direct on the right targeted consumers. Fashion and Couture Houses are accommodated in the several most prestigious malls. Other big cities like Bandung, Surabaya are starting to go the same direction on the strategy of Fashion marketing.
FASHION FESTIVALS

The most prominent fashion events are Bali Fashion Week and Jakarta Fashion Week. These two international events give a lot of positive impact to the development of Indonesian Women’s fashion business. Bali, one of the most popular tourism spot in the world, is visited by millions of people and has a sizeable international resident. It is a great place for designers and companies to get international exposure.

The Jakarta Fashion Week (JFW) is held annually and aimed to provide directions to the Indonesian fashion industry as well as a vehicle to demonstrate its wealth in talents and creativity. The other goal is to turn Jakarta as a major fashion focal point in the region and the world. This event will be noted in the Indonesian fashion history as the window to introduce Indonesian fashion to the international world.

In the 2008 Fashion Week, the fashion experts and activists from different groups collaboratively worked together and took important part in displaying an array of styles ranging from Moslem and evening wear to ethnic and contemporary designs, featuring the works of around 50 designers, including young designers from Australia. The event was attended by more than 4,000 people.

The 2009 Jakarta Fashion Week was held on November 14th-20th at the Pacific Place, a super modern mall in Jakarta. More than sixty of Indonesia’s leading designers participated in the event with many presenting collections inspired by the country’s rich heritage in different types of traditional fabrics while simultaneously keep their eyes on the present and future. The 2009 JFW featured collection originated from a designers’ exchange program between India and Indonesia. The festival also comprised the annual fashion design contest.

The JFW was organized by event management company the Azura Activation, which since its founding in 1971 has been active in promoting the Indonesian fashion industry through various editorial initiatives as well as events. The event is supported by the Ministry of Trade and other government and private sectors.

Besides the annual Fashion Week, there are similar fashion exhibitions and parades organized throughout the year by either the designer and business groups, or fashion associations in many provinces all over Indonesia.
The Trade of Women’s Fashion

Indonesia’s garment production was US $5,588 million in 2004 and increased to US $6,632 million in 2008, which mostly exported to the United States of America, Europe and Japan at a value of up to US $6,015, while the rest was absorbed by domestic consumers. Beside garment production by big manufacturers, contribution by small scale industries reached up to US $1,265 million in 2007 which mostly consumed domestically. The small scale industries include those fashion designers’ houses.

DISTRIBUTION CHANNEL

In the Indonesian garment industry especially the ready-to-wear products line, the manufacturer directly produces their own brand for either local sale or export, and some others receive job order from local and foreign buyers.

**Importer at Pre-production:**
Design → Pattern making → sample making → corrections → fabric and trim sourcing

**Factory and Overseas Agent:**
Fabric and trim purchase → cut, make and trim → final inspection

**Importer and Retailer Post production:**
Shipping → customs clearance → distribution
GARMENT EXPORT

Major destinations of garment exports are the United States, contributing 26%, the European Union (12%), ASEAN (5%) and Japan (3%).

Indonesia’s garments account for only 3 to 4% of the world’s total. The United States and Europe would remain major destinations for Indonesian garment exports, while countries in the Middle East and the former Soviet Union would act as buffer markets. It is observed that local producers could strengthen the Indonesian global position as an important garment industry player by pushing for greater compliance with global manufacturing practices.

In 2008, garment export was increasing up to US $ 6,015 million, and the same year the import also rose to US $ 232 million. Garment import mostly comes from China, the biggest competitor for Indonesian garment industry. The table below shows ten biggest Indonesian garment exports by product in 2004 up to 2008.

<table>
<thead>
<tr>
<th>HS CODE</th>
<th>TITLE</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>62120000</td>
<td>BRASIERES</td>
<td>234,641,225</td>
<td>267,948,515</td>
<td>312,467,022</td>
<td>308,303,684</td>
<td>282,104,702</td>
</tr>
<tr>
<td>620630190</td>
<td>BLOUSES OF COTTON OTHER THAN BATIK</td>
<td>103,191,542</td>
<td>144,647,372</td>
<td>204,119,614</td>
<td>226,866,203</td>
<td>249,725,795</td>
</tr>
<tr>
<td>610610000</td>
<td>WOMEN’S OR GIRL’S BLOUSES, SHIRTS OF COTTON</td>
<td>46,569,234</td>
<td>67,259,508</td>
<td>139,411,975</td>
<td>213,518,584</td>
<td>230,929,317</td>
</tr>
<tr>
<td>620462900</td>
<td>WOMEN’S TROUSERS &amp; SHORTS OF COTTON OTHER THAN BATIK</td>
<td>153,547,505</td>
<td>173,142,758</td>
<td>174,226,379</td>
<td>189,591,470</td>
<td>199,448,064</td>
</tr>
<tr>
<td>620640190</td>
<td>BLOUSES OF MAN-MADE FIBRE OTHER THAN BATIK</td>
<td>118,814,456</td>
<td>114,929,329</td>
<td>119,133,368</td>
<td>110,602,504</td>
<td>128,882,970</td>
</tr>
<tr>
<td>610462000</td>
<td>WOMEN’S TROUSER &amp; SHORT KNIT/CROCHET OF COTTON</td>
<td>14,482,915</td>
<td>41,316,543</td>
<td>50,034,332</td>
<td>81,842,363</td>
<td>128,120,633</td>
</tr>
<tr>
<td>620469900</td>
<td>WOMEN’S TROUSER &amp; SHORT OF OTHER TEXTILE MATERIALS OTHER THAN BATIK</td>
<td>114,925,454</td>
<td>147,741,858</td>
<td>181,974,004</td>
<td>131,485,045</td>
<td>116,248,928</td>
</tr>
<tr>
<td>620463990</td>
<td>OTHER WOMEN’S TROUSERS OF FIBRES</td>
<td>45,417,093</td>
<td>68,053,336</td>
<td>95,619,092</td>
<td>100,971,485</td>
<td>92,107,517</td>
</tr>
<tr>
<td>610690900</td>
<td>WOMEN’S OR GIRL’S BLOUSES, SHIRTS OF OTHER FIBRES</td>
<td>54,001,104</td>
<td>89,446,775</td>
<td>100,483,247</td>
<td>77,422,232</td>
<td>88,182,660</td>
</tr>
<tr>
<td>620449900</td>
<td>WOMEN’S DRESSES OF OTHER TEXTILE MATERIALS OTHER THAN BATIK</td>
<td>29,010,716</td>
<td>54,543,300</td>
<td>57,866,274</td>
<td>67,181,250</td>
<td>76,162,932</td>
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<tr>
<td>OTHER COMMODITIES</td>
<td>1,008,326,328</td>
<td>997,007,641</td>
<td>1,084,535,231</td>
<td>1,115,990,958</td>
<td>1,228,709,190</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>1,922,927,572</td>
<td>2,166,036,935</td>
<td>2,519,870,538</td>
<td>2,623,775,778</td>
<td>2,820,622,708</td>
<td></td>
</tr>
</tbody>
</table>

Source: Central Board of Statistics, Prepare by NAFED
The following table shows the world top ten importers of garments. United States is still a biggest importer, followed by Germany, United Kingdom, France and Hong Kong.

### Top 10 Importers of Women’s Garment Fashion

<table>
<thead>
<tr>
<th>No</th>
<th>Importer</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008 (*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Germany</td>
<td>8,834,830</td>
<td>9,040,342</td>
<td>9,635,560</td>
<td>10,674,977</td>
<td>11,344,249</td>
</tr>
<tr>
<td>3</td>
<td>United Kingdom</td>
<td>7,691,773</td>
<td>8,062,806</td>
<td>8,489,770</td>
<td>9,551,589</td>
<td>9,222,279</td>
</tr>
<tr>
<td>4</td>
<td>France</td>
<td>6,049,435</td>
<td>6,375,677</td>
<td>6,754,975</td>
<td>7,713,960</td>
<td>8,447,532</td>
</tr>
<tr>
<td>5</td>
<td>Hong Kong (SARC)</td>
<td>6,739,903</td>
<td>7,474,965</td>
<td>7,662,657</td>
<td>7,705,425</td>
<td>7,407,953</td>
</tr>
<tr>
<td>6</td>
<td>Italy</td>
<td>3,312,252</td>
<td>3,629,889</td>
<td>4,291,715</td>
<td>4,951,971</td>
<td>5,356,707</td>
</tr>
<tr>
<td>7</td>
<td>Belgium</td>
<td>2,339,360</td>
<td>2,610,539</td>
<td>2,749,095</td>
<td>3,088,313</td>
<td>3,454,943</td>
</tr>
<tr>
<td>8</td>
<td>Canada</td>
<td>1,750,606</td>
<td>2,034,681</td>
<td>2,329,988</td>
<td>2,678,221</td>
<td>2,832,783</td>
</tr>
<tr>
<td>9</td>
<td>Austria</td>
<td>1,648,363</td>
<td>1,721,204</td>
<td>1,799,804</td>
<td>2,099,634</td>
<td>2,275,023</td>
</tr>
<tr>
<td>10</td>
<td>Switzerland</td>
<td>1,588,416</td>
<td>1,591,283</td>
<td>1,610,121</td>
<td>1,830,528</td>
<td>2,011,993</td>
</tr>
<tr>
<td></td>
<td>Other Countries</td>
<td>29,587,985</td>
<td>32,017,319</td>
<td>36,228,438</td>
<td>43,430,248</td>
<td>18,473,248</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td>96,540,644</td>
<td>103,188,411</td>
<td>111,247,210</td>
<td>124,006,539</td>
<td>99,724,726</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics, prepared by NAFED

Note: (*) Preliminary (not all country recorded)

### COMPETITION IN WORLD MARKET (MARKET SHARE)

The table below shows the Indonesian market share in the United States for HS 6204 from 2004 up to 2008, where Indonesia in 2008 ranked as the third biggest exporter after China and Vietnam.

### Market Share of USA Market for HS 6204

<table>
<thead>
<tr>
<th>No</th>
<th>Country</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008 (*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>2,487,009</td>
<td>3,976,006</td>
<td>4,589,028</td>
<td>4,941,474</td>
<td>4,794,588</td>
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<tr>
<td>2</td>
<td>Viet Nam</td>
<td>495,898</td>
<td>610,534</td>
<td>703,055</td>
<td>869,311</td>
<td>973,614</td>
</tr>
<tr>
<td>3</td>
<td>Indonesia</td>
<td>607,253</td>
<td>742,819</td>
<td>836,101</td>
<td>796,640</td>
<td>711,678</td>
</tr>
<tr>
<td>4</td>
<td>India</td>
<td>441,164</td>
<td>771,605</td>
<td>770,041</td>
<td>704,167</td>
<td>656,436</td>
</tr>
<tr>
<td>5</td>
<td>Bangladesh</td>
<td>269,115</td>
<td>398,633</td>
<td>485,451</td>
<td>536,818</td>
<td>587,530</td>
</tr>
<tr>
<td>6</td>
<td>Mexico</td>
<td>1,424,439</td>
<td>1,170,393</td>
<td>827,461</td>
<td>646,543</td>
<td>500,710</td>
</tr>
<tr>
<td>7</td>
<td>Cambodia</td>
<td>414,618</td>
<td>427,629</td>
<td>387,892</td>
<td>396,463</td>
<td>399,213</td>
</tr>
<tr>
<td>8</td>
<td>Hong Kong (SARC)</td>
<td>939,093</td>
<td>835,326</td>
<td>731,803</td>
<td>533,207</td>
<td>390,613</td>
</tr>
<tr>
<td>9</td>
<td>Sri Lanka</td>
<td>383,040</td>
<td>422,573</td>
<td>428,393</td>
<td>418,569</td>
<td>379,387</td>
</tr>
<tr>
<td>10</td>
<td>Philippines</td>
<td>535,809</td>
<td>487,461</td>
<td>473,565</td>
<td>402,760</td>
<td>326,980</td>
</tr>
<tr>
<td></td>
<td>Other Countries</td>
<td>4,751,633</td>
<td>3,993,137</td>
<td>3,538,862</td>
<td>3,068,784</td>
<td>2,690,382</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td>12,749,071</td>
<td>13,836,116</td>
<td>13,771,652</td>
<td>13,314,736</td>
<td>12,411,131</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics, prepared by NAFED

Note: (*) Preliminary (not all country recorded)
The table below shows the Indonesian market share in Germany for HS 6204 from 2004 up to 2008, where Indonesia in 2008 ranked as the 15th

### Market Share of Germany Market for HS 6204

<table>
<thead>
<tr>
<th>No</th>
<th>Country</th>
<th>Value in US$ Thousand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2004</td>
</tr>
<tr>
<td>1</td>
<td>China</td>
<td>497,810</td>
</tr>
<tr>
<td>2</td>
<td>Turkey</td>
<td>605,742</td>
</tr>
<tr>
<td>3</td>
<td>Romania</td>
<td>438,041</td>
</tr>
<tr>
<td>4</td>
<td>Bangladesh</td>
<td>218,283</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>281,634</td>
</tr>
<tr>
<td>6</td>
<td>Bulgaria</td>
<td>167,319</td>
</tr>
<tr>
<td>7</td>
<td>India</td>
<td>59,834</td>
</tr>
<tr>
<td>8</td>
<td>Poland</td>
<td>222,180</td>
</tr>
<tr>
<td>9</td>
<td>Tunisia</td>
<td>134,377</td>
</tr>
<tr>
<td>10</td>
<td>The former Yugoslav Republic of Macedonia</td>
<td>57,686</td>
</tr>
<tr>
<td>15</td>
<td>Indonesia</td>
<td>48,987</td>
</tr>
<tr>
<td></td>
<td>Other Countries</td>
<td>1,374,313</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td>4,106,206</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics, prepared by NAFED
Note: *) Preliminary (not all country recorded)

The following table is showing USA import market share for HS 6104 in 2004 to 2008. Indonesia ranked as the 3rd after China and Vietnam.

### Market Share of USA Market for HS 6104

<table>
<thead>
<tr>
<th>No</th>
<th>Country</th>
<th>Value in US$ Thousand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2004</td>
</tr>
<tr>
<td>1</td>
<td>China</td>
<td>91,918</td>
</tr>
<tr>
<td>2</td>
<td>Viet Nam</td>
<td>99,184</td>
</tr>
<tr>
<td>3</td>
<td>Indonesia</td>
<td>45,212</td>
</tr>
<tr>
<td>4</td>
<td>Cambodia</td>
<td>30,748</td>
</tr>
<tr>
<td>5</td>
<td>Philippines</td>
<td>47,199</td>
</tr>
<tr>
<td>6</td>
<td>Mexico</td>
<td>259,604</td>
</tr>
<tr>
<td>7</td>
<td>Sri Lanka</td>
<td>18,826</td>
</tr>
<tr>
<td>8</td>
<td>Chinese Taipei</td>
<td>131,242</td>
</tr>
<tr>
<td>9</td>
<td>Guatemala</td>
<td>103,778</td>
</tr>
<tr>
<td>10</td>
<td>Honduras</td>
<td>83,157</td>
</tr>
<tr>
<td></td>
<td>Other Countries</td>
<td>1,216,814</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td>2,127,682</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics, prepared by NAFED
Note: *) Preliminary (not all country recorded)
The table below shows the Indonesian market share in Germany for HS 6104 from 2004 up to 2008, where Indonesia in 2008 ranked as the 7th after Hungary.

### Market Share of Germany Market for HS 6104

<table>
<thead>
<tr>
<th>No</th>
<th>Country</th>
<th>Value in US$ Thousand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2004</td>
</tr>
<tr>
<td>1</td>
<td>China</td>
<td>120,980</td>
</tr>
<tr>
<td>2</td>
<td>Turkey</td>
<td>198,767</td>
</tr>
<tr>
<td>3</td>
<td>Bangladesh</td>
<td>22,884</td>
</tr>
<tr>
<td>4</td>
<td>India</td>
<td>29,960</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>24,572</td>
</tr>
<tr>
<td>6</td>
<td>Hungary</td>
<td>8,452</td>
</tr>
<tr>
<td>7</td>
<td>Indonesia</td>
<td>11,791</td>
</tr>
<tr>
<td>8</td>
<td>France</td>
<td>14,186</td>
</tr>
<tr>
<td>9</td>
<td>Cambodia</td>
<td>2,728</td>
</tr>
<tr>
<td>10</td>
<td>Romania</td>
<td>12,502</td>
</tr>
<tr>
<td></td>
<td>Other Countries</td>
<td>270,291</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td>717,113</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics, prepared by NAFED
Note: *) Preliminary (not all country recorded)

### INDIAN GARMENT EXPORT

#### Export of HS 6102

WOMEN’S OR GIRLS’ OVERCOATS, CARCOATS, CAPES, CLOAKS, ANORAKS (INCLUDING SKI-JAC KETS) AND SIMILAR ARTICLES, KNITTED OR CROCHETED, OTHER THAN OF NO. 6104

<table>
<thead>
<tr>
<th></th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>DKI Jakarta</td>
<td>14,075,637</td>
<td>39,515,763</td>
<td>66,143,917</td>
<td>66,918,393</td>
<td>76,017,601</td>
</tr>
<tr>
<td>Riau</td>
<td>885,793</td>
<td>8,256,573</td>
<td>14,701,750</td>
<td>13,485,949</td>
<td>43,782,430</td>
</tr>
<tr>
<td>Central Java</td>
<td>360,557</td>
<td>369,184</td>
<td>1,333,367</td>
<td>2,081,173</td>
<td>2,157,031</td>
</tr>
<tr>
<td>Bali</td>
<td>61,716</td>
<td>197,858</td>
<td>405,515</td>
<td>122,753</td>
<td>42,236</td>
</tr>
<tr>
<td>East Java</td>
<td>137,418</td>
<td>80,854</td>
<td>286,022</td>
<td>244,507</td>
<td>18,037</td>
</tr>
<tr>
<td>Other Provinces</td>
<td>216</td>
<td>35,549</td>
<td>24,455</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>15551337</td>
<td>48455761</td>
<td>82895028</td>
<td>82852788</td>
<td>122917335</td>
</tr>
</tbody>
</table>

Source: BPS-Statistics Indonesia
Export of HS 6204

WOMEN’S OR GIRLS SUITS, ENSEMBLES, JACKETS, BLAZERS, DRESSES, SKIRTS, DIVIDED SKIRTS, TROUSERS, BIB AND BRACE OVERALLS, BREECHES AND SHORTS (OTHER THAN SWIMWEAR).

Export of HS 6202

WOMEN’S OR GIRLS’ BLOUSES, SHIRTS AND SHIRT-BLOUSES.

Source: BPS-Statistic Indonesia
Export of HS 6106

WOMEN'S OR GIRLS' BLOUSES, SHIRTS AND SHIRT-BLOUSES, KNITTED OR CROCHETED. in US$

<table>
<thead>
<tr>
<th>PROVINCE</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>DKI Jakarta</td>
<td>236,689,858</td>
<td>236,689,858</td>
<td>236,689,858</td>
<td>236,689,858</td>
<td>236,689,858</td>
</tr>
<tr>
<td>Riau</td>
<td>10,752,544</td>
<td>10,752,544</td>
<td>10,752,544</td>
<td>10,752,544</td>
<td>10,752,544</td>
</tr>
<tr>
<td>Central Java</td>
<td>21,789,497</td>
<td>21,789,497</td>
<td>21,789,497</td>
<td>21,789,497</td>
<td>21,789,497</td>
</tr>
<tr>
<td>Other Province</td>
<td>845,140</td>
<td>845,140</td>
<td>845,140</td>
<td>845,140</td>
<td>845,140</td>
</tr>
<tr>
<td>TOTAL</td>
<td>259,365,049</td>
<td>259,365,049</td>
<td>259,365,049</td>
<td>259,365,049</td>
<td>259,365,049</td>
</tr>
</tbody>
</table>

Source: BPS-Statistic Indonesia

Export of HS 6202

WOMEN'S OR GIRLS' OVERCOATS, RAINCOATS, CLOAKS, ANORAKS (INCLUDING SKI-JACKETS) AND SIMILAR ARTICLES, NOT KNITTED OR CROCHETED, OTHER THAN OF NO. 6204

<table>
<thead>
<tr>
<th>PROVINCE</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>DKI Jakarta</td>
<td>131,976,906</td>
<td>106,366,181</td>
<td>77,229,598</td>
<td>66,634,027</td>
<td>58248972</td>
</tr>
<tr>
<td>Central Java</td>
<td>4,131,274</td>
<td>1,861,066</td>
<td>4,781,724</td>
<td>3,550,328</td>
<td>3,491,187</td>
</tr>
<tr>
<td>East Java</td>
<td>2,510,302</td>
<td>2,763,222</td>
<td>2,190,612</td>
<td>1,007,581</td>
<td>343,954</td>
</tr>
<tr>
<td>Other Provinces</td>
<td>2,348,835</td>
<td>2,589,211</td>
<td>838,605</td>
<td>960,324</td>
<td>228,945</td>
</tr>
<tr>
<td>TOTAL</td>
<td>140,967,317</td>
<td>113,579,680</td>
<td>85,040,539</td>
<td>72,152,260</td>
<td>62,313,058</td>
</tr>
</tbody>
</table>

Source: BPS-Statistic Indonesia

Export of HS 6108

WOMEN'S OR GIRLS' SLIPS, PETTICOATS, BRIEFS, PANTIES, NIGHTDRESSES, PYJAMAS, NEGILGES, BATHROBES, DRESSING GOWNS AND SIMILAR ARTICLES, KNITTED OR CROCHETED. in US$

<table>
<thead>
<tr>
<th>PROVINCE</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>DKI Jakarta</td>
<td>102,681,830</td>
<td>102,681,830</td>
<td>102,681,830</td>
<td>102,681,830</td>
<td>102,681,830</td>
</tr>
<tr>
<td>Riau</td>
<td>2,913,274</td>
<td>2,913,274</td>
<td>2,913,274</td>
<td>2,913,274</td>
<td>2,913,274</td>
</tr>
<tr>
<td>Central Java</td>
<td>1,522,146</td>
<td>1,522,146</td>
<td>1,522,146</td>
<td>1,522,146</td>
<td>1,522,146</td>
</tr>
<tr>
<td>Other Provinces</td>
<td>189,921</td>
<td>189,921</td>
<td>189,921</td>
<td>189,921</td>
<td>189,921</td>
</tr>
</tbody>
</table>

Source: BPS-Statistic Indonesia
Ministry of Trade
Republic of Indonesia

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(62-21) - 384 8662
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Fax (62-21) 23525170
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Directorate General of International Trade Cooperation
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Fax (62-21) 23526210
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Fax (62-21) 23527250
E-mail. kabpen@depdag.go.id

Commodity Future Trading Regulatory Agency (COFTRA)
Gedung Bumi Daya Plaza 4th Floor
Jl. Imam Bonjol NO.61
Jakarta 10310 -INDONESIA
Phone (62-21) 315 6315
Fax (62-21) 315 6135
E-mail. kabappeti@depdag.go.id
Website www.bappebti.go.id

Trade Research and Development Agency (TREDA)
Jl. M.I. Ridwan Rais No. 5 Main Building
4th Floor, Jakarta 10110 - INDONESIA
Phone (62-21)3858171 (hunting)
Facx (62-21) 23528691
E-mail kabalitbang@depdag.go.id
# Indonesian Trade Attaches

<table>
<thead>
<tr>
<th>Country</th>
<th>Embassy Address</th>
<th>Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Australia</strong></td>
<td>Indonesian Embassy 8, Darwin Avenue, Yarralumia, Canberra Australia A.C.T. 2600</td>
<td>T: (61-02) - 62508654 F: (61-02) - 62730757 <a href="mailto:atdag-aus@depdag.go.id">atdag-aus@depdag.go.id</a> <a href="http://www.kbri-canberra.org.au">www.kbri-canberra.org.au</a></td>
</tr>
<tr>
<td><strong>Belgium</strong></td>
<td>Indonesian Mission to the European Union Boulevard de la Woluwe 38 Brussels, Belgium 1200</td>
<td>T: (322) - 7790915 F: (322) - 7728190 <a href="mailto:atdag-blx@depdag.go.id">atdag-blx@depdag.go.id</a></td>
</tr>
<tr>
<td><strong>Canada</strong></td>
<td>Indonesian Embassy 55 Parkdale Avenue, Ottawa, Ontario, Canada 1KY - 1E5</td>
<td>T: (613) - 7241100 ext. 306 F: (613) - 7241105, 7244959 <a href="mailto:atdag-can@depdag.go.id">atdag-can@depdag.go.id</a> <a href="mailto:commerce@indonesia-ottawa.org">commerce@indonesia-ottawa.org</a> <a href="http://www.indonesia-ottawa.org">www.indonesia-ottawa.org</a></td>
</tr>
<tr>
<td><strong>Denmark</strong></td>
<td>Indonesian Embassy Orehoj Alle 1, 2900 Hellerup, Copenhagen, Denmark</td>
<td>T: (45) - 3962422 ext 215 F: (45) - 3962483 <a href="mailto:atdag-dnk@depdag.go.id">atdag-dnk@depdag.go.id</a></td>
</tr>
<tr>
<td><strong>Egypt</strong></td>
<td>Indonesian Embassy 13, Aisha EL Temoria St. Garden City P.O. BOX 1564 Cairo, Egypt</td>
<td>T: (20-2) - 7946498, 7947200/9 F: (20-2) - 5962495 <a href="mailto:atdag-egy@depdag.go.id">atdag-egy@depdag.go.id</a></td>
</tr>
<tr>
<td><strong>France</strong></td>
<td>Indonesian Embassy 47-49, Rue Cortambert Paris, France 75116</td>
<td>T: (33) - 450302760 ext. 418, 45044872 F: (33-1) - 45045032 <a href="mailto:atdag-fra@depdag.go.id">atdag-fra@depdag.go.id</a></td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>Indonesian Embassy Lehter Strasse 16-17 D-10557 Berlin, Germany 10557</td>
<td>T: (49-30) - 4780700 F: (49-30) - 47807209 <a href="mailto:atdag-deu@depdag.go.id">atdag-deu@depdag.go.id</a></td>
</tr>
<tr>
<td><strong>India</strong></td>
<td>Indonesian Embassy 50-A Chanakyapuri New Delhi, India 110021 (09-111) - 6885460, 6886763 <a href="mailto:atdag-ind@depdag.go.id">atdag-ind@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>Indonesian Embassy Via Campania, 55 Rome Italia 00167 T: (39-06) - 4200911, 42009168 F: (39-06) - 4880280, 42010428 <a href="mailto:atdag-ita@depdag.go.id">atdag-ita@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Japan</strong></td>
<td>Indonesian Embassy 5-2-9, Higashi Gotanda Shinagawa-ku Tokyo, Japan 1410022 T: (81-3) - 34414201, 34470596 F: (81-3) - 34471697 <a href="mailto:atdag-jpn@depdag.go.id">atdag-jpn@depdag.go.id</a> <a href="http://www.indonesian_embassy.or.jp">www.indonesian_embassy.or.jp</a></td>
<td></td>
</tr>
<tr>
<td><strong>Malaysia</strong></td>
<td>Indonesian Embassy No. 233 Jalan Tun Razak Kuala Lumpur, Malaysia 50400 T: (60-3) - 21164000, 21164067 F: (60-3) - 21167908, 21448407 <a href="mailto:atdag-mys@depdag.go.id">atdag-mys@depdag.go.id</a> <a href="http://www.indonesia-embassy.org.my">www.indonesia-embassy.org.my</a></td>
<td></td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td>Indonesian Embassy 8, Tobias Asserlaan The Hague, Netherlands 2517 KC T: (31-70) - 310 8115 F: (31-70) - 364 3331 <a href="mailto:atdag-nld@depdag.go.id">atdag-nld@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>People's Republic of China</strong></td>
<td>Indonesian Embassy Dongzhimenwai Dajie No. 4 Chaoyang District, Beijing, China 100600 T: (86-1) - 65324748-65325688-3014 F: (86-1) - 6532588 <a href="mailto:atdag-cn@depdag.go.id">atdag-cn@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Philippines</strong></td>
<td>Indonesian Embassy 185, Salcedo Street Legaspi Village, Makati City, Metro Manila T: (63-2) - 8925061-68 F: (63-2) - 8925878, 8874192 <a href="mailto:atdag-phi@depdag.go.id">atdag-phi@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Russia</strong></td>
<td>Indonesian Embassy Apt. 76, Entr. 3 Korovy val 7 Moscow Russia 117049 T: (7-495) - 2385281 F: (7-495) - 2385281 <a href="mailto:atdag-rus@depdag.go.id">atdag-rus@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Saudi Arabia</strong></td>
<td>Indonesian Embassy Riyadh Diplomatic Quarter P.O. Box 94343 Riyadh, Saudi Arabia 11693 T: (966-1) - 4882800, 4882131 ext 120 F: (966-1) - 4882966 <a href="mailto:atdag-sau@depdag.go.id">atdag-sau@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Singapore</strong></td>
<td>Indonesian Embassy 7 Chatsworth Road Singapore 249761 T: (65) - 6735420, 68395458 F: (65) - 6735037, 67352027 <a href="mailto:atdag-sgp@depdag.go.id">atdag-sgp@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>South Korea</strong></td>
<td>Indonesian Embassy 55, Yoido-dong Young Deoung po-Ku Seoul Korea Selatan T: (82-2) - 7835371-2, 7827750 F: (82-2) - 7804280, 7837750 <a href="mailto:atdag-kor@depdag.go.id">atdag-kor@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Spain</strong></td>
<td>Indonesian Embassy 65, Calle de Agastia Madrid, Spain 28043 T: (34-91) - 4130294 F: (34-91) - 4157792 <a href="mailto:atdag-esp@depdag.go.id">atdag-esp@depdag.go.id</a></td>
<td></td>
</tr>
<tr>
<td><strong>Switzerland</strong></td>
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