Currently, conditions of textile industry and textile products (TPT) in Indonesia have not changed much, in the sense that there has been no positive development, even here and there in fact the industry can be considered to getting worse. Not many steps that can be done, either by the employers or by any party to restructurize the textile industry so that it could compete better in the domestic market and export market.

Especially with the strong TPT incoming from China which lately has led some factories, such as textile industries that rely solely on the domestic market to be wedged. Some textile factories feel that they have difficulties to survive the market competition because the inexpensive price of textile from China. And to a certain class, it is very hard to counter by domestic manufacturers.

In such conditions are also expected as a result of the inefficiency of the textile industry in the country as compared to the similar industry in China. TPT-operated machine in the country in general is old and is no longer efficient compared with factories in China that always make renewal of the machinery and equipments. China has a strong industrial machinery and able to produce machinery and equipment of textile products with a relatively cheap while on the other hand, the banking sector is also very helpful in export-oriented factories.

Meanwhile, textile machinery restructuring efforts in Indonesia have been planned for a long time though up until now has not received any positive response from the banks. The government is already working to help that restructuring so it can go as planned, but the banking system in general still doubts on the credibility of the development of the textile industry because many textile companies are having problems with the banks.

One thing that still quite encouraging is that exports of textile and textile products (TPT) can still survive. Indonesia’s exports to the Asian region countries is projected to reach U.S. $ 1.02 billion in 2013, up by 5% compared to the figure in 2012 which is predicted to be U.S. $ 980 million, or contribute 7% to the total national textile exports amounted to U.S. $ 14 billion. Actually, Indonesia’s textile exports to Asia could still be driven if the product’s competitiveness can be enhanced. Indonesia should look for alternative markets to compensate for a decline in the markets of Europe and the United States (U.S.) due to the economic crisis which is still felt.
In the last three years, the U.S. is still a major goal of Indonesian textile exports to contribute around 36-38% of the national total textile exports while exports of these products to the EU amounted to 16-18%. Indonesia’s TPT is also sold to other market such as Africa by 3%, Japan 6%, South Korea 2-3% and 3% to the United Arab Emirates.

National textile products have been competing with producers from Vietnam, Cambodia, Bangladesh and South Korea in Asia market. Even South Korean textile manufacturers have entered into Ethiopia to strengthen its market position in Africa. We are optimistic that, if the product’s competitiveness can be increased, the national textile export growth could reach 18-21%. On the other hand, garment imports in 2013 could reach IDR 75 trillion assuming national garment consumption to reach IDR 95-100 trillion. In 2012, garment consumption is projected to reach Rp 90 trillion or quite stagnant when compared to the year 2011.

Volume of consumption increased from 6.5 kg to 7 kg per capita with consumption value of about Rp.90 trillion in 2012. In 2013, local garment products in the domestic market could be getting down to 25-30 trillion. This will happen due to the provincial minimum wage increase (UMP) which amount in the range of 30-40% compared to the year 2012, hence, so many garment manufacturers to close down. National textile turnover is projected to reach U.S. $ 21.6 billion in 2012 which is up 4% compared to the achievement in 2011 of U.S. $ 20.6 billion. Turnover of national textile products on sales to the export market was U.S. $ 14 billion and the domestic market amounted to U.S. $ 7.6 billion, while for the export and domestic markets respectively rose 3% and 5% compared to the year 2011 of U.S. $ 13.3 billion.

The production capacity of the national textile industry rose 6.75% to 7.87 million tons in 2011 from 7.38 million tons in the previous year while the absorption of labor rose 4.78% from 1.40 million to 147 workers from a year ago.

### Turnover of Indonesia’s TPT Industry 2009-2012 (US$ billion)

<table>
<thead>
<tr>
<th>Turnover</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Sale</td>
<td>5.3</td>
<td>6.6</td>
<td>7.4</td>
<td>7.6</td>
</tr>
<tr>
<td>Export</td>
<td>9.3</td>
<td>11.2</td>
<td>13.3</td>
<td>12.5</td>
</tr>
<tr>
<td>Total Turnover</td>
<td>14.6</td>
<td>17.8</td>
<td>20.6</td>
<td>21.6</td>
</tr>
</tbody>
</table>

### Export of Indonesia’s Textile & Textile Products In US$ billion (2009-2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Textile</th>
<th>Garment</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>3.6</td>
<td>5.7</td>
<td>9.3</td>
</tr>
<tr>
<td>2010</td>
<td>4.7</td>
<td>6.5</td>
<td>11.2</td>
</tr>
<tr>
<td>2011</td>
<td>5.6</td>
<td>7.7</td>
<td>13.3</td>
</tr>
<tr>
<td>2012*</td>
<td>5.0</td>
<td>7.6</td>
<td>12.6</td>
</tr>
<tr>
<td>2013*</td>
<td>5.4</td>
<td>8.0</td>
<td>13.4</td>
</tr>
</tbody>
</table>

- prediction CIC’s Contribution
Seeing the condition that occurs in both the domestic and international markets has led PT. Capricorn Indonesia Consult Inc. to review more deeply on the player's of textile and garment industry in Indonesia through the study of “INDONESIA’S TEXTILE, GARMENT, AND APPAREL PRODUCERS DIRECTORY, 2013” in which this publication contains more than 1,500 companies, complete with all the necessary profile information.

This Indonesia’s TEXTILE, GARMENT, AND APPAREL Producers Directory, 2013 can be owned for US$ 550 or equivalent Rupiah per copy, available in English. For ordering and information, please contact our Marketing department, Miss. Qisti W.L, either through her mobile number at +62812 8869 2048, CIC’s phone number at (+6221) 29468491-92, 29486240-41, 3101081, (+6221) 29486239, fax at (+6221) 3101505, (+6221) 4759155 e-mail at qisti@cic.co.id, marketing@cic.co.id or by visiting our official website at www.cic.co.id.

Thank you very much.

PT. CAPRICORN Indonesia Consult Inc.

SENDY HARRIESANJAYA
Managing Director

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**CIC Order Form**

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A Member of the CIC Consulting Group
CIC Building, Jalan Paus 89, Rawamangun
Jakarta Timur 13220, Indonesia.

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<tr>
<td>Company Name</td>
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Address
Head Office
Jalan DR. Rajiman No. 15
Pasir Kaliki, Cicendo
Bandung 40117
West Java
Phones - (022) 4232388 (Hunting)
Fax - (022) 4233425, 4232388

Factory
Jalan Ranca Kasumba
Majalaya
Bandung 40376
West Java
Phones - (022) 5952285
Fax - (022) 5952278

Date Of Establishment
28 September 1994

Legal Status
PT (Limited Liability Company)

Category
National Private and Domestic Investment (PMDN) Company

Permits
The Capital Investment Coordinating Board
No. 792/I/PMDN/1994
Dated 30 November 1994

Lines of Business
Textile Industry

Production Capacity
Grey Fabrics - 40,000,000 mtrs p.a.
Finished Fabrics - 40,000,000 mtrs p.a.

Shareholders
Mr. Iteng Yohan
Mr. Arifin Yohan
Mrs. Linna Yohan
Mrs. Sandriani Yohan

Capitalization
Authorized Capital Rp.20,000,000,000.00
Issued Capital Rp.20,000,000,000.00
Paid Up Capital Rp. 4,000,000,000.00

Total Investment
Equity Capital · · · · · · · · · · · · · ·
Rp.20,000 million
Loan Capital · · · · · · · · · · · · · · ·
Rp.64,700 million
Total Investment · · · · · · · · · ·
Rp.84,700 million

Banks
PT Bank Rakyat Indonesia Tbk.

Started Operation
1996

Total Employees
300 persons

Supervisory Board
Chairman - Mrs. Sandriani Yohan
Member - Mrs. Linna Yohan

Board of Management
President Director - Mr. Arifin Johan
Directors - Mr. Iteng Johan

Associated Companies
PT UNGGUL BUKIT KENCANA (Textile Industry)

Remarks
In Production