

Refreshing **COCOA BEAN** From Indonesia



What's Inside

Being the third largest producer of cocoa beans, Indonesia still has the potentials to increase its exports to the world and at the same time maintains its domestic consumption.

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Dear Valued Readers,

We have come to the last edition of Export News for 2013 and hope that you have realized all of your targets for this year.

The December 2013 edition of Export News, published by the the Directorate General for National Export Development (DGNED), Ministry of Trade, Republic of Indonesia, brings to you another leading export commodity from Indonesia, cocoa beans. Cocoa beans can be procesed into various intermediary products, such as cocoa butter and powder and a number of end products such as hot chocolate and chocolate bars.

Indonesia is the world's third largest producer of cocoa beans, after Côte d'Ivoire and Ghana, with a production of some 800,000 tons from 1.56 million hectares of cocoa plantations.

Export of cocoa beans from Indonesia, however, only stood at the sixth place with an export of US\$384.83 million, or 4.56% from the world's total export of cocoa which stood at US\$8.43 billion in 2012. With a low production rate of only 600 kg/ hectare, while Côte d'Ivoire produces 1.5 tons/ ha, there is still a huge potentials for Indonesia to increase its cocoa beans production for both domestic and export markets.

We sincerely hope that you will be able to make a sound decision using information from this December 2013 edition of Export News since your can contact the exporters directly for a mutually beneficial relations.

Thank You

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hot issue

People in various countries love to consume chocolate, be it in the form of hot chocolate, chocolate bars or even chocolate cake. There is even a movie in 2000 titled *Chocolat*, starred by Juliette Binoche, which tells the good things inspired by the good tastes of chocolate.

All forms of chocolate come from cocoa beans which in turn come from the cocoa tree or *Theobroma cacao*, a small (4–8 meters tall) evergreen tree in the family *Malvaceae*, which originates in the deep tropical regions of Central and South America. Cocoa trees grow in hot, rainy tropical areas within 20° of

latitude north and south from the equator. Cocoa harvest is not restricted to one period per year. Usually it occurs over several months and in many countries cocoa can be harvested at any time of the year.

The fruit is called cacao pod with an ovoid form, between 15-30 cm long and 8-10 cm wide. A fruit usually weights about 500 grams with its color ranges from yellow to orange when it is ripening. The seeds are contained inside the pod and each contains between 40-50% of coca butter while the pulp is made into a refreshing juice in some countries. Cocoa



has theobromine as its active component which has similar properties with caffeine from coffee beans. Harvesting cocoa pods is easy as they grow directly from the trunk or large branch of a tree instead from the end of branches. Therefore, harvesting the pods by hand is much easier as most of them will be easily reachable. The pods are harvested using a curved knife on a long pole. Machete is usually used to open the harvested pods and expose the beans. The pulp and cocoa seeds are removed while the rind is discarded.

The pulp and seeds are then stored in heaps, placed in bins, or laid out on grates for a couple of days. The seeds and pulp are undergoing a “sweating” process in which the thick pulp liquefies as it ferments. The pulp will trickle away as it ferments, leaving the seeds to be collected. The process of “sweating” is an important process to improve the quality of the beans which originally has strong bitter taste.

A pod typically contains between 20 and 50 beans while some 880 dried beans are needed to make one kilogram of chocolate. One pod can yield between 35 grams and 40 grams of dried beans.

Wet beans are then fermented and dried. The fermentation takes time between four and seven days and must be mixed every two days. The beans

are dried for between five and 14 days, depending on the local climate conditions. The fermented beans are spread out over a large surface and constantly being raked to dry them.

The first stage of fermentation is yeast development in which between 10% and 15% of natural sugar in cocoa meat is turned by microorganism into alcohol. This natural alcohol will kill the bacteria. The second stage of fermentation is the creation of lactate acid where lactate bacteria turn alcohol and other organism. The fermentation process ends when the color of cacao beans turn into the specific brown. The color change takes place as the beans are oxidized by polyphenol gas which was created during the fermentation process.

After the fermentation process is finished, the cacao beans must be thoroughly rinsed and dried. The drying process can use sunlight or artificial heater. Natural sunlight, however, is more preferable for drying because there are no additional flavors such as smoke or oil being introduced which will alter the flavor. This simple process is very important as drying could enhance and strengthen the cacao flavor. Dried cacao beans will lose most of its water content and will lose almost half of its original weight.

Cocoa beans should be dry for shipment, which is usually by ships. The beans are traditionally exported

in jute bags although recently shipments are using bulk parcels with a capacity of some 25 tons. The use of bags, however, is still a common thing.

The beans are then roasted for further process into various chocolate products.

Cacao products include cacao beans, shell and cacao waste, cacao paste, cacao fat and cacao powder. Cacao beans are used by midstream industry to produce cocoa liquor, cocoa cheese, cocoa butter, and cocoa powder, which are used to feed downstream industry producing chocolate, chocolate based candies and milk, etc.

Cocoa liquor is produced by grinding cacao beans to turn out soft cocoa pulp mixed with cocoa fat. The fat could be separated by pressing cocoa liquor until it is dry. After being dry it is ground again to turn out cocoa powder.

Cocoa butter, which is the most expensive, constitutes cocoa fat an extraction from cocoa liquor in the process of producing cocoa powder. Cocoa butter is often used as an ingredient for chocolate candies and basic material for cosmetics like lipstick. The Harmonized System (HS) Code 180100 groups Cocoa Beans, Whole Or Broken, Raw Or Roasted.

Cacao beans for trading are usually differentiated into two large groups, the edel or fine cacao and the lindak or bulk cacao.

Historically, chocolate makers recognize three main cultivars of cacao beans which are used to produce the end products: Criollo, Forastero and Trinitario.

The most precious, rare and expensive cultivar is the Criollo group, which has been used by the Mayans. This cultivar from Chuao, a village in the northern coast of Venezuela. Established in the 16th century, the village is famous for its cacao plantations which produce some of the finest cocoa beans in the world.

Cocoa beans from the Criollo cultivar account for 10% of chocolate production which is less bitter and more aromatic compared to other beans. Mainly cultivated

in South and Central America, yields from Criollo cultivar are fairly low and the beans are often mixed with other varieties when producing chocolate.

Some 80% of chocolate production use cocoa beans from the Forastero cultivar, which is mainly cultivated in Africa although it also being planted in Central and South America. The trees produce higher yield as they grow much faster than other types of the tree.

The third cultivar, the Trinitario, is a crossbreed between Forastero and Criollo and is mainly cultivated in Asia other than in Central and South America. Criollo contributes its aroma while Forastero contributes disease resistance and productivity to Trinitario.

There is actually the fourth cultivar, the Nacional which is mostly cultivated in South America but it is prone to disease and difficult to grow although the Nacional beans have excellent aroma.

Breeders, however, could also create newer varieties that are more resistant to diseases and have favorable aroma.





Refreshing **COCOA BEAN** From Indonesia

Indonesia is establishing itself as one of the world's top producers of cocoa beans. There has been steady increase of cocoa beans from some 621,000 tons in 2006 to more than 800,000 tons in 2013. The major production areas of cocoa beans are Central Sulawesi, Southeast Sulawesi, South Sulawesi and West Sulawesi provinces, accounting for more than 70% of the national production. Currently the total cocoa cultivation area spans some 1.59 million hectares nationwide as of 2009. Other potential areas for cacao cultivation include East Kalimantan, Maluku and Papua provinces with a coverage of up to 6 million hectares.

Smallholder plantations make up 92.7% of Indonesia's total plantations but a farmer cultivates only an average of 1 hectare.

Indonesia is the world's third largest cocoa beans after Côte d'Ivoire and Ghana. The productivity of Indonesian cacao trees, however, is still small at only 660 kilograms/hectare when compared with Côte d'Ivoire which could reach 1.5 tons/ha.

The Indonesian government has set a target to become the world's largest producer of cocoa beans in the near future. This can be reached by improving the cocoa trees productivity which is currently very low due to diseases and low maintenance.

The efforts to increase productivity include replanting more than 70,000 hectares of cacao plantations, rehabilitating 235,000 hectares and intensifying 145,000 hectares. The government has also been as applying pest control measures in over 450,000 hectares since 2009 for three years. The

Indonesian government expects to see increasing cacao production from Sulawesi as well as Bali, East Nusa Tenggara, Maluku and Papua provinces.

Other than low productivity, Indonesian cocoa beans also have quality problems because farmers are reluctant to ferment the harvested cocoa beans. The farmers often say fermenting the beans takes longer much time than selling the beans without being fermented. The government has launched a campaign urging farmers to undergo the fermentation process before selling the beans as this will greatly increase the selling price.

The process to open the cacao pod and get the seeds is a tiring and time-consuming process. Therefore, some kind of machine is needed to facilitate the process. A trial has been made with a newly-designed machine with the capacity of 1,200 cacao pods per hour with a success rate of 96% in separating the seeds from the skin.

Cocoa beans is an important agriculture commodities, being the third largest export contributor in the agriculture sector after palm oil and rubber. Cocoa tree cultivation in Indonesia supports more than 1.3 million farmer families all over the country.

The Indonesian government, however, have started to impose higher export tax for export of raw cocoa beans at a maximum rate of 25% since 2010. A number of foreign chocolate producers have poured in investment in Indonesia ever since. Despite several shortcomings, Indonesia still have the opportunities to seize larger chunk of the world



market as other cocoa beans producers, such as Malaysia, Papua New Guinea, the Philippines and Vietnam, producer much lower amount of cocoa beans when compared to Indonesia's production.

The International Cacao and Coffee Organization (ICCO) estimated that the world's demand for cacao beans would increase to 3.299 million tons while the current production is about 3.288 million tons. Developed countries in North America and Europe consume between 2,433 grams and 2,783 grams per capita per year while the consumption in developing countries, Asia, Middle East and Africa,

is still very low at between 12 grams and 262 grams per capita per year.

Another attempt to promote cocoa beans and chocolate products to the general public is the Cocoa Day Expo, which was held for the first time on September 18-22 at the Mal Taman Anggrek in Jakarta. The event, held to mark the designation of the Indonesian Cacao Day on September 16, was organized with a theme of: "My chocolate, my culture, my Indonesia". The event will be held regularly every year.

EXPORT

The export of cocoa worldwide showed a growth trend of 9.19% in the period of 2008-2012. The export was US\$5.86 billion worth of cocoa beans in 2008 and jumped significantly to US\$8.28 billion in 2009. The export relatively unchanged in 2009 with US\$8.29 billion in 2010 before spiking to US\$9.6 billion in 2011. The export, however, weakened to US\$8.43 billion in 2012, or a decrease of 12.67%.

African countries dominate the top cocoa producers with Côte d'Ivoire being the largest exporter. It exported US\$2.93 billion worth of cocoa in 2012 for a market share of 34.81%. The export however, represented a 2.66% decrease from its export of US\$3.01 billion in 2011. Generally, Côte d'Ivoire had a healthy growth trend of 12.54% in the period of 2008-2012.

Coming in second was Ghana which had a market share of 23.36% in 2012 by exporting US\$1.97 billion worth of cocoa, a 4.82 decrease from US\$2.07 billion it exported in the previous year. The 2008-2012 growth trend for Ghana was 22.79%.

Nigeria was the third largest exporter in 2012 sending US\$540.46 million or 6.40% share of the world's total export. The export in 2012 was a 43.63 decrease from the export value of US\$958.77 million in 2011. Nigeria suffered from an average 1.50% annual contraction of its cacao export in the five-year period ending in 2012 for a roller-coaster export performance.

In the fourth place was Cameroon, exporting US\$424.10 million in 2012 or 5.03% of the world's



total export in 2012. The export in 2012, however, represented a 17.22% reduction of the US\$512.34 million worth of cocoa Cameroon exported in the previous year. Cameroon's export in the period of 2008-2012 only grew by 0.57% in average per year. The Netherlands, which is not a cacao producing country, exported US\$417.12 million worth of cocoa for a market share of 4.94%, making it the world's fifth largest exporter. The export was 22.42% lower than US\$537.64 million exported by the Netherlands in 2011. However, the Netherlands still enjoyed a 38.44% of growth trend in the period of 2008-2012.

On the contrary, the world's third largest cocoa producer Indonesia could only exported US\$384.83 million of cocoa in 2012 for a market share of 4.56% standing at the sixth place. In fact, Indonesia suffered from decreasing export in the period of 2008-2012 at an annual average rate of 19.48%. Indonesia exported US\$854.58 million in 2008 and jumped significantly to US\$1.08 billion in the following year. Indonesia's top export in the five-year period was US\$1.19 billion in 2010 before starting to dwindle with US\$614.49 million.

Another non-cocoa producing country, Belgium, stood at the seventh place with an export of US\$340.60 million (4.04%) and was followed by Ecuador with US\$339.55 million (4.02%), Dominican Republic with US\$178.45 million (2.11%) and yet another non-producer Estonia completed the world's Top 10 producers of cocoa with US\$158.71 million (1.88%).

In the first seventh months of 2013, Indonesia exported US\$249.42 million worth of cocoa, an increase of 8.98% from export in the same period in 2012 of US\$232.82 million.

Indonesia exported most of its cocoa to Malaysia with US\$155.27 million in the first seven months of 2013 or 62.25% of Indonesia's total export in the period. The figure was a 6.73% increase from US\$145.48 million worth of cocoa exported to Malaysia in the same period in 2012. The full year export to Malaysia in 2012 was US\$225.74%, which only commanded 58.66% of Indonesia's total export. Overall, Indonesia's annual export trend in the period of 2008-2012 contracted by 14.40%.

Singapore was the second largest destination of Indonesian cocoa with an export of US\$53.12 million in the period of January-July in 2013, 21.30% of total export, which represented a 4.87% decrease from US\$55.84 million in the same period in 2012. The export to Singapore was US\$92.79 million or 24.11% in 2012. Indonesia's export to Singapore also suffered from decreasing growth trend at 5.32% in the period of 2008-2012.

Export to the United States was US\$15.26 million in the first seven months of 2013 for a share of 6.12%, China with US\$11.76 million (4.71%) and Thailand completed the Top 5 export destination with US\$11.73 million (4.70%).

IMPORT

The world imported US\$8.26 billion worth of cocoa beans in 2012, contracting by 32.77\$ from the import figure in 2011 of US\$12.28 billion, according to ITC calculations based on UN COMTRADE statistics. The annual average growth trend for the period of 2008-2012 was 5.40%. The import was US\$7.61 billion in 2008 before picking up to US\$8.53 billion and US\$9.50 billion in 2008 and 2009 respectively.

In the 2008-2012 period, the Netherlands was the largest importing country with an import of US\$1.66 billion in 2012 for a share of 20.15%. The figure represented a 23.22% decrease from the US\$2.16 billion imported by the United States in 2011. Interestingly, in the same year the Netherlands exported US\$417.12 million worth of cocoa for a market share of 4.94% to be the world's largest exporter of cocoa beans.

The United States is the second largest importer in 2012 with US\$1.03 billion or 12.52% from the world's total import of cocoa beans. The US imported 29.56% less from US\$1.46 billion in 2011.

Germany imported US\$917,60 million for a share of 11.11%, followed by Malaysia with US\$877.53 million (10.62%) and Belgium with US\$596.97 million (7.23%) to complete the world's Top 5 importers of cocoa beans. Oddly enough, Belgium was also the seventh largest exporter with US\$340.60 million or 4.04% from the world's total export in 2012.

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