POTENSI EKSPOR

PRODUK ORGANIK PERKEBUNAN

TAHUN 2022

EMILIA SETYOWATI
PRESIDEN AOI

Bogor, 23 Februari 2022





INDONESIA TERKINI

KEMENTERIAN PERDAGANGAN
REPUBLIK INDONESIA

G20 INDONESIA 2022

NERACA PERDAGANGAN INDONESIA 2017-2021

Ekspor Indonesia pada tahun 2021 mencapai USD 231,52 Miliar, merupakan yang tertinggi sepanjang sejarah.

No.	URAIAN	USD MILIAR 2017	2018	2019	2020	2021	% CHANGE (YoY) 2020/19	2021/20	% TREND 2017-21
I.	**EKSPOR**	**168.83**	**180.01**	**167.68**	**163.19**	**231.52**	**(2.68)**	**41.87**	**5.48**
	- Migas	*15.74*	*17.17*	*11.79*	*8.25*	*12.28*	*(30.01)*	*48.78*	*(11.58)*
	- Non Migas	*153.08*	*162.84*	*155.89*	*154.94*	*219.25*	*(0.61)*	*41.50*	*6.92*
II.	**IMPOR**	**156.99**	**188.71**	**171.28**	**141.57**	**196.19**	**(17.34)**	**38.58**	**1.60**
	- Migas	*24.32*	*29.87*	*21.88*	*14.26*	*25.53*	*(34.85)*	*79.07*	*(6.22)*
	- Non Migas	*132.67*	*158.84*	*149.39*	*127.31*	*170.66*	*(14.78)*	*34.05*	*2.86*
III.	**TOTAL TRADE**	**325.81**	**368.72**	**338.96**	**304.76**	**427.71**	**(10.09)**	**40.34**	**3.60**
	- Migas	*40.06*	*47.04*	*33.67*	*22.51*	*37.80*	*(33.16)*	*67.96*	*(8.18)*
	- Non Migas	*285.75*	*321.68*	*305.29*	*282.25*	*389.91*	*(7.54)*	*38.14*	*5.03*
IV.	**TRADE BALANCE**	**11.84**	**(8.70)**	**(3.59)**	**21.62**	**35.33**			
	- Migas	*(8.57)*	*(12.70)*	*(10.10)*	*(6.01)*	*(13.25)*			
	- Non Migas	*20.41*	*4.00*	*6.50*	*27.63*	*48.59*			

Sumber: BPS (2022), diolah Kemendag

Ekspor Non Migas 2021 mencapai **USD 219,25 Miliar**, tumbuh (41,50 % YoY)

Impor Non Migas 2021 mencapai **USD 170,66 Miliar** tumbuh (34,05% YoY)

Neraca Perdagangan tahun 2021 **SURPLUS USD 35,33 Miliar**

Neraca Migas tahun 2021 **Defisit USD 13,25 Miliar**

Neraca Non Migas tahun 2021 **Surplus USD 48,59 Miliar**

Sumber : Kasan, Kepala Badan Pengembangan Kajian Perdagangan, 2022

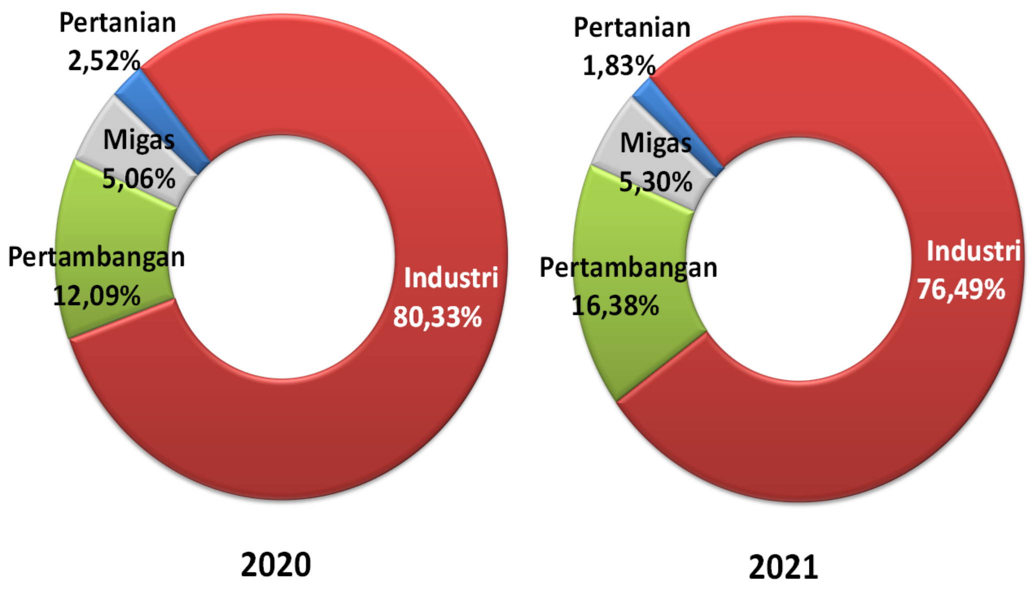
INDONESIA TERKINI

KEMENTERIAN PERDAGANGAN
REPUBLIK INDONESIA

G20 INDONESIA 2022

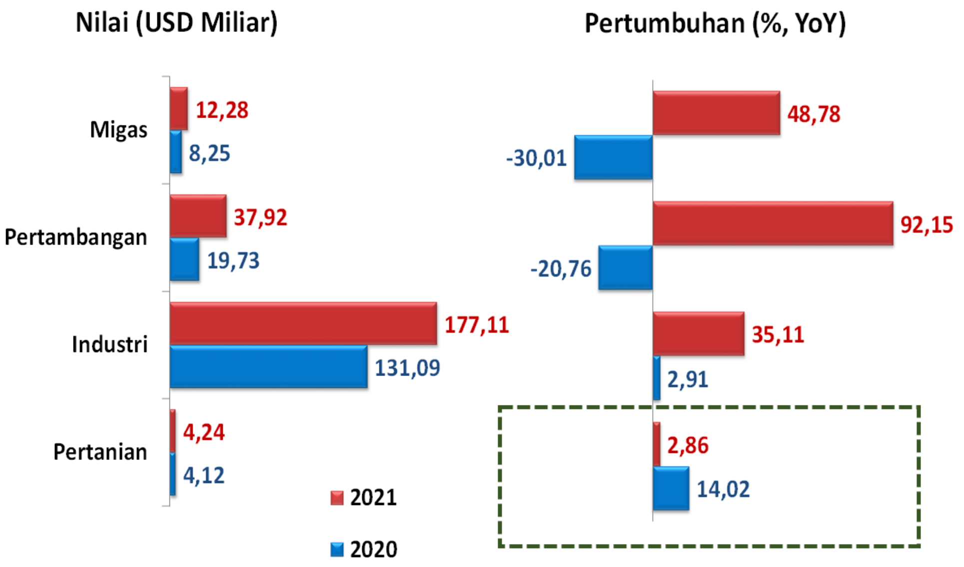
PERKEMBANGAN STRUKTUR EKSPOR INDONESIA

STRUKTUR EKSPOR



Sumber: BPS (2022), diolah Kemendag

NILAI & PERTUMBUHAN EKSPOR



- Struktur ekspor Indonesia didominasi oleh **sektor Industri**, dengan kontribusi pada tahun 2021 mencapai 76,49% dari total ekspor Indonesia.
- Sementara, sektor pertanian menyumbang sebesar 1,83% terhadap total ekspor nasional tahun 2021.

- Pada tahun 2021, ekspor sektor Pertanian hanya tumbuh 2,86% (YoY). Lebih rendah dibandingkan dengan pertumbuhan sektor lainnya.

Sumber : Kasan, Kepala Badan Pengembangan Kajian Perdagangan, 2022

KEMENTERIAN PERDAGANGAN REPUBLIK INDONESIA

G20 INDONESIA 2022

EKSPOR SEKTOR PERTANIAN MENURUT PRODUK

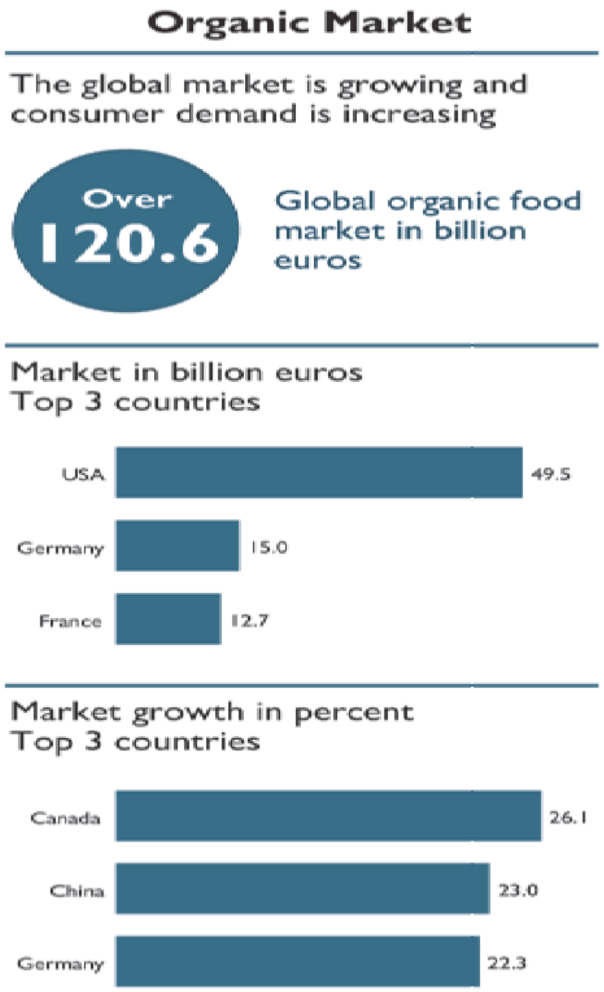
No	PRODUK	Nilai : USD Juta 2017	2018	2019	2020	2021	Perub (%) 2021 yoy	Trend (%) 2017-2021	Share (%) 2021 Thd Total Ekspor	Share (%) 2021 Thd Pertanian
	EKSPOR INDONESIA	**168,828.2**	**180,012.7**	**167,683.0**	**163,191.8**	**231,522.50**	**41.87**	**5.48**	**100.00**	
	EKSPOR PERTANIAN	**3,671.0**	**3,431.0**	**3,612.4**	**4,119.0**	**4,237.50**	**2.88**	**4.81**	**1.83**	**100.00**
1	Kopi arabica/robusta	1,175.4	806.9	872.4	809.2	842.52	4.12	-6.42	0.36	19.88
2	Sarang Walet	280.4	290.7	364.2	540.7	517.96	-4.20	20.29	0.22	12.22
3	Bahan-bahan nabati lainnya	145.2	162.9	204.4	316.6	417.65	31.93	32.02	0.18	9.86
4	Kacang Areca/pinang	335.7	315.6	305.5	267.6	371.19	38.71	0.36	0.16	8.76
5	Rumput laut	159.1	208.4	218.2	183.1	225.34	23.05	5.83	0.10	5.32
6	Lada	228.3	147.4	141.8	155.3	157.92	1.66	-6.61	0.07	3.73
7	Kelapa lainnya	82.6	63.6	69.9	158.4	108.35	-31.58	15.68	0.05	2.56
8	Ikan segar lainnya	74.6	74.1	110.5	108.5	104.56	-3.61	11.14	0.05	2.47
9	Kelapa bulat	120.2	56.2	39.3	58.7	102.98	75.55	-2.62	0.04	2.43
10	Pala	51.2	52.9	64.9	75.6	102.30	35.40	19.01	0.04	2.41
11	Cengkeh	26.9	95.8	107.1	173.2	94.17	-45.63	36.29	0.04	2.22
12	Kayu manis	68.9	66.2	55.5	72.5	91.18	25.75	6.72	0.04	2.15
13	Kapulaga (cardamom)	11.0	16.5	21.1	64.4	76.84	19.33	69.17	0.03	1.81
14	Kepiting segar	44.6	45.0	43.3	44.5	76.25	71.31	11.19	0.03	1.80
15	Tembakau	55.9	67.8	60.8	63.7	73.84	16.00	5.04	0.03	1.74
16	Jambu biji	5.2	34.5	44.4	82.4	72.66	-11.79	84.70	0.03	1.71
17	Mete gelondong	112.6	84.3	121.0	102.4	70.72	-30.92	-7.10	0.03	1.67
18	Lak, Getah dan Damar	44.4	54.4	48.2	44.5	66.83	50.15	6.38	0.03	1.58
19	Bunga pala (mace)	26.7	29.8	40.7	47.0	58.70	24.87	22.57	0.03	1.39
20	Cocoa beans (Biji Kakao)	53.5	72.5	80.6	75.8	56.29	-25.75	1.47	0.02	1.33
	Sub Total	**3,102.4**	**2,745.5**	**3,014.1**	**3,443.8**	**3,688.24**	**7.10**	**5.89**	**1.59**	**87.04**
	Manufaktur Lainnya	**568.6**	**685.5**	**598.3**	**675.2**	**549.3**	**-18.65**	**-0.84**	**0.24**	**12.96**

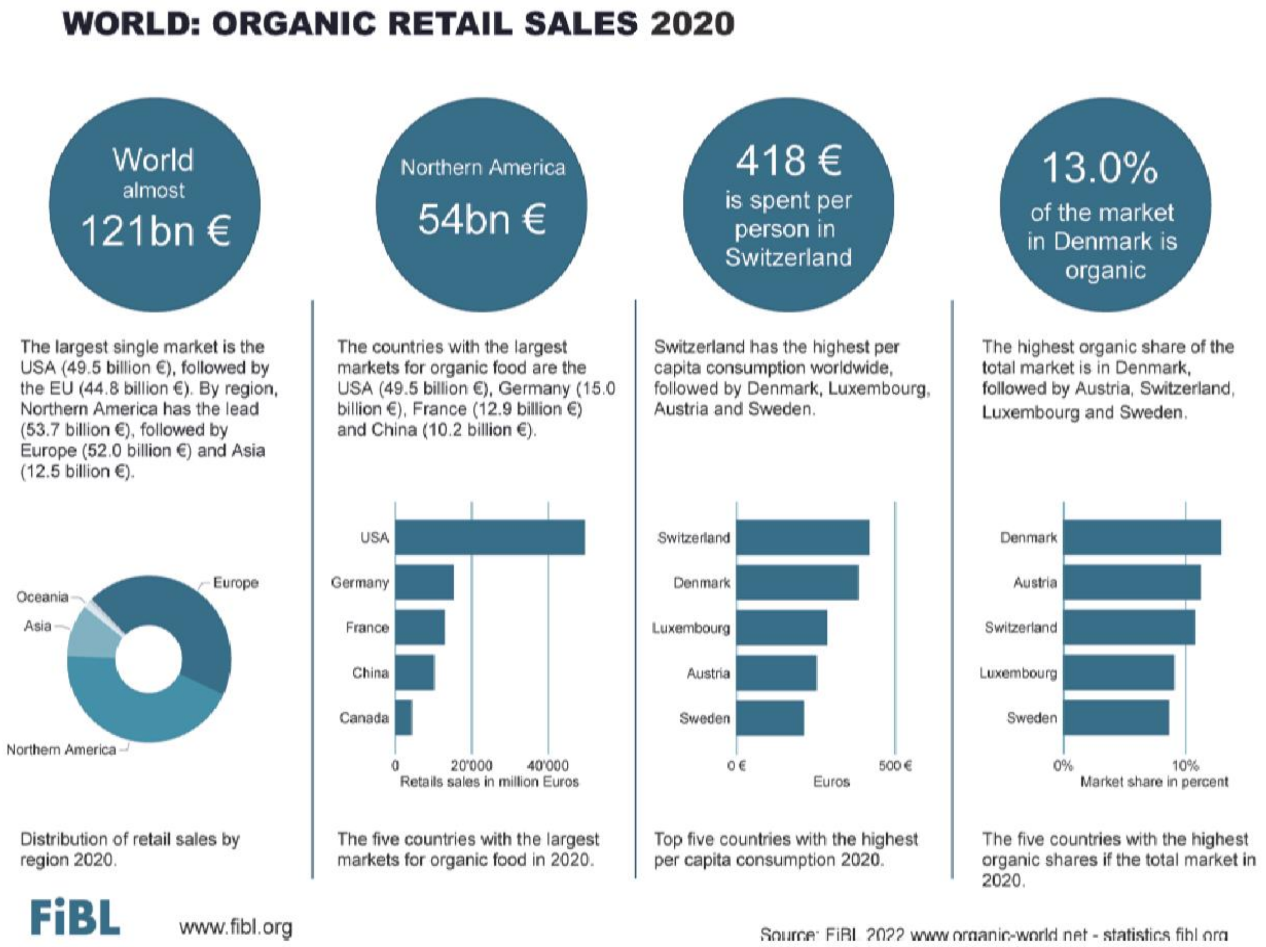
Sumber: BPS (2022), diolah Kemendag

- Ekspor Pertanian didominasi oleh ***Kopi arabica/ robusta, Sarang Walet*** dengan kontribusi masing-masing sebesar 19,88% dan 12,22% terhadap ekspor pertanian pada tahun 2021.
- Sementara itu, produk pertanian yang naik tinggi pada tahun 2021 adalah **Kelapa bulat (naik 75,55% YoY), Kepiting segar (71,31%), serta Lak, Getah & Damar (50,15%)**.

Sumber : Kasan, Kepala Badan Pengembangan Kajian Perdagangan, 2022

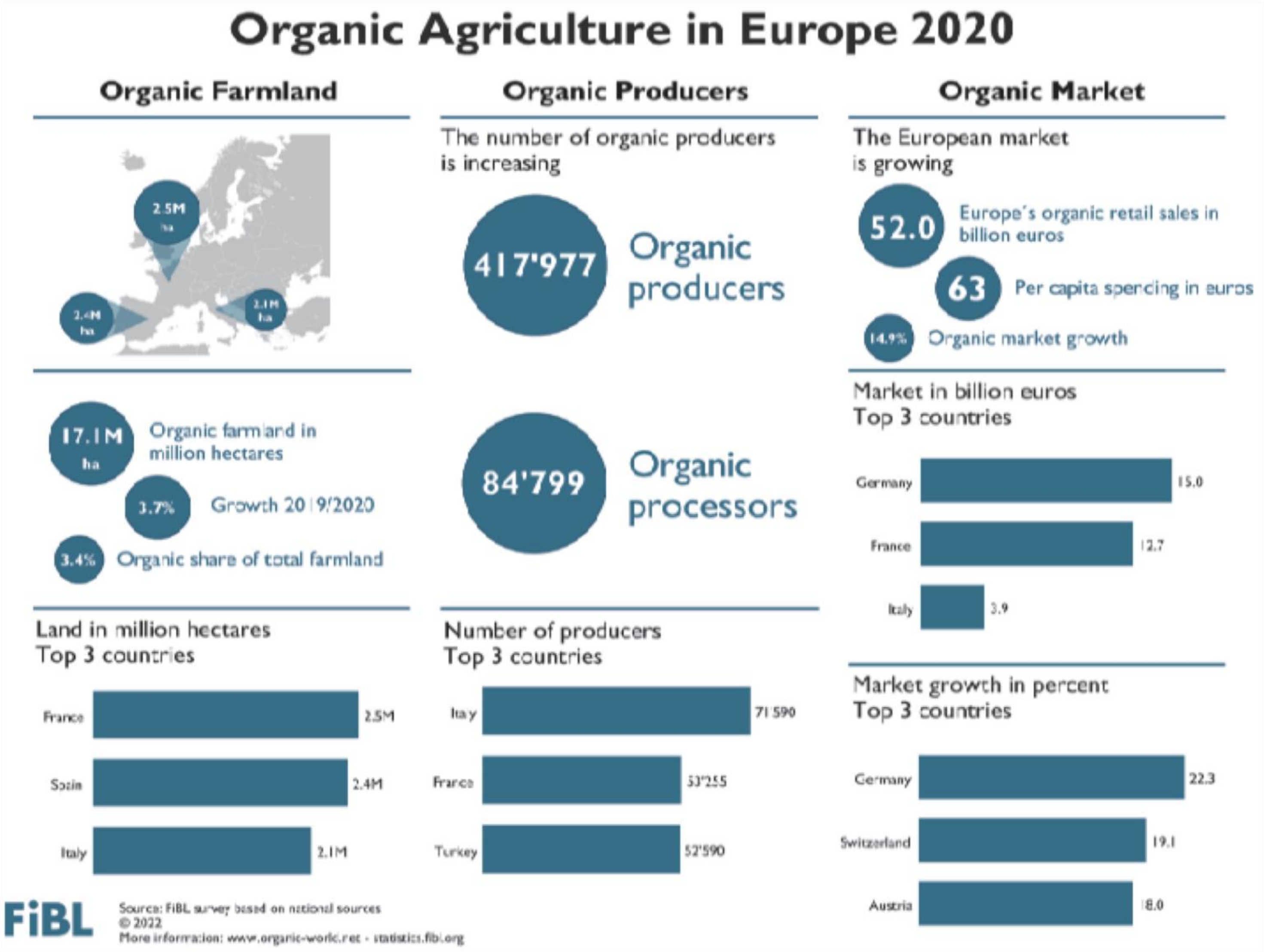
DUNIA TERKINI





Sumber: FiBL & IFOAM Organics International (2022)

PASAR EROPA



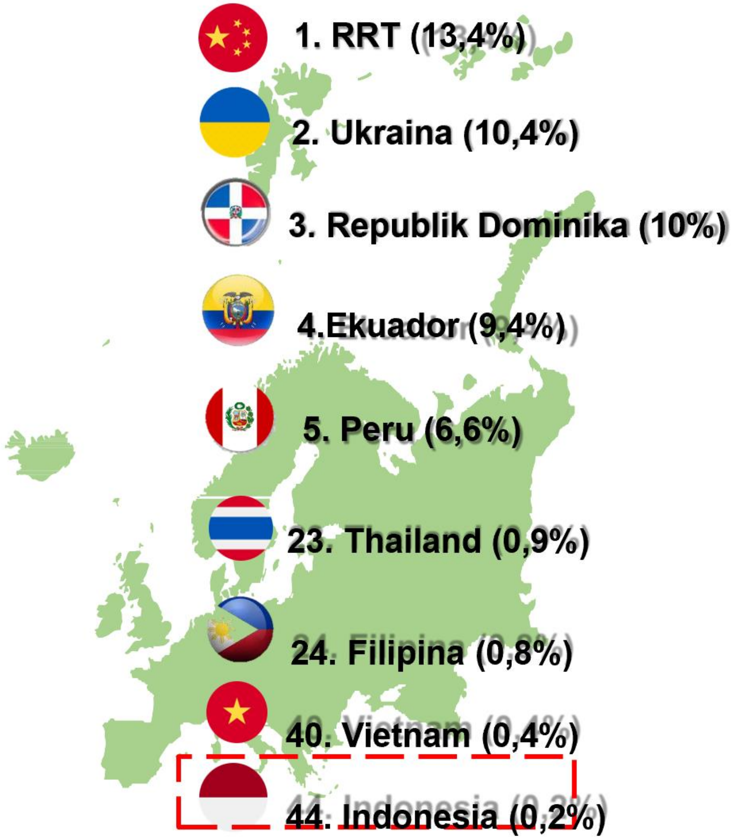
- Pertumbuhan pasar organik: 14.5% (2020), capai 52 triliun Euro
- Lebih dari 417 ribu produsen organik di Eropa
- Top 3 produsen organik di Eropa: Italia (71,590), Prancis (53,255(dan Turki (52,490)
- Pangsa pasar tertinggi di eropa: Jerman (22,3%), Swiss (19.1%) dan Austria (8.0%)
- Konsumen di Eropa menghabiskan 63 Euro per capita pertahun untuk konsumsi produk organik

Sumber: FiBL & IFOAM Organics International (2022)

PASAR EROPA

HIGHLIGHT EKSPOR PRODUK ORGANIK INDONESIA KE DUNIA : UNI EROPA

Eksportir Terbesar Produk Organik ke UE



Sumber: EU Agricultural Market Briefs of organic agri-food products

Produk Organik Pertanian yang di Ekspor ke UE

1. Buah-buahan, rempah dan kacang-kacangan tropis, (885.930; 27.3%) *)
2. Oilcakes (385.924 ; 11,9%)
3. Sereal (324.354 ; 7,2%)
4. Gula Bit dan tebu (213.797 ; 6,6%)
5. Gandum (203.927 ;6,3%)
6. Minyak nabati selain dari kedelai (160.137 ; 4,9%)
7. Sayuran, segar, dingin dan dikeringkan (159.155; 4.9%)
8. Kopi dan teh (141.383; 4.4%) *)
9. Buah, segar atau kering kecuali jeruk & buah tropis (133.723; 4.1)
10. Kedelai (132.079; 4,1%)

***) Produk ekspor unggulan pertanian Indonesia**

Sumber: Kasan, Dirjen PEN 2021

POTENSI PRODUK INDONESIA

HS code	Product label
31	Fertilisers
38	Misceallanous Chemical Products
7	Edible vegetables and certain roots and tubers
8	Edible fruit and nuts; peel of citrus fruit or melons
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal . . .
9010	Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes . . .
9020	Tea, whether or not flavoured
18	Cocoa and cocoa preparations: cocoa
9040	Pepper of the genus Piper; dried or crushed or ground fruits of the genus Capsicum or of the . . .
9080	Nutmeg, mace and cardamoms
1702	Other sugars, incl. chemically pure lactose, maltose, glucose and fructose, in solid form; . . .

FOKUS TUJUAN EKSPOR INDONESIA 2022

1. AUSTRALIA
2. CHILE
3. EFTA (SWISS, NORWEGIA, ISLANDIA, LIECHTENSTEIN)
4. JEPANG
5. KOREA
6. PAKISTAN
7. MOZAMBIQUE
8. UNI EMIRAT ARAB

TANTANGAN

1 ON FARM

1. Pendidikan di tingkat petani rendah
2. Kurangnya pemahaman kesetaraan gender
3. Kurangnya pemahaman kualitas dan kuantitas di tk petani
4. Kurangnya input dan benih organik
5. Pemahaman dan pengetahuan tentang standar dan kelengkapan produk ekspor
6. Akses terhadap pembiayaan
7. Logistic & infrastruktur
8. Kurangnya riset dan teknologi
9. Kurang resilient dan adaptif terhadap krisis klimat
10. Usia petani muda yang semakin berkurang

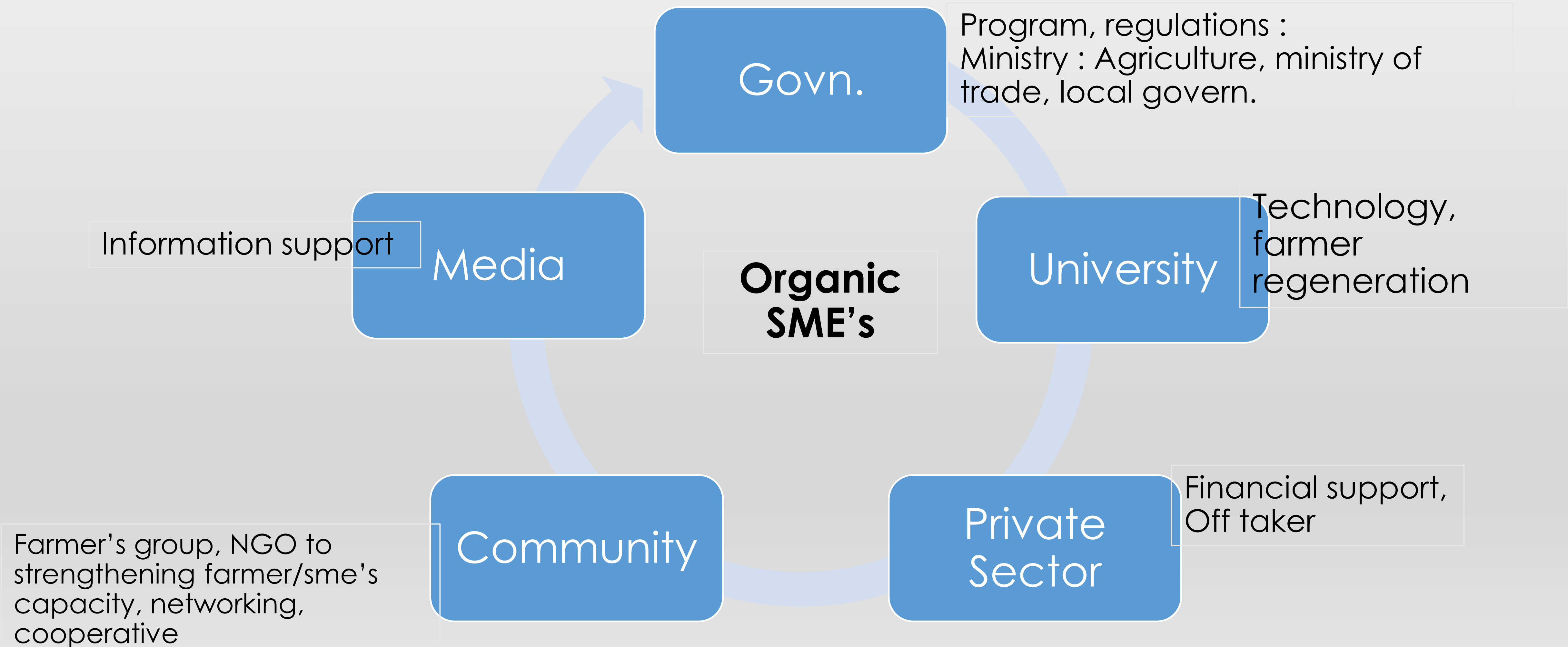
2 OFF FARM

- **Penguatan kelembagaan tingkat Petani**
- Asistensi dan Pendampingan Manajamen
- Teknologi Pasca Panen

PETANI = AGRI-PRENEUR

ECOSYTEM MAPPING

STRATEGY TO IMPROVE SME'S IN ORGANIC



LESSON LEARNED

- Ministry of Agriculture
- Bank, micro finance
- University
- Funding

FARMERS

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- Ministry of trade, local gornv.
- Off taker/private sector

EXPORT

Capacity building farmer and groups,
Technical assistance

Incubation business, aggregator business

MEDIA PARTNERS

SDG's & ORGANIK

Organic is a part of the solution

Increasing Positive Impact

Carbon Sequestration	13 CLIMATE ACTION
30-50% more biodiversity on organic farms	15 LIFE ON LAND
Superior water holding capacity	6 CLEAN WATER AND SANITATION
Certified and recognizable for customers	12 RESPONSIBLE CONSUMPTION AND PRODUCTION
Organic products have higher level of nutrition	3 GOOD HEALTH AND WELL-BEING
Organic agriculture = climate smart	2 ZERO HUNGER

Reducing Negative Impact

13 CLIMATE ACTION	Production of Agrochemical
15 LIFE ON LAND	Chemicals negatively affect biodiversity above and below soil
6 CLEAN WATER AND SANITATION	Chemicals pollute precious water systems
14 LIFE BELOW WATER	Artificial fertilizer is one of the cause of "dead zones"
12 RESPONSIBLE CONSUMPTION AND PRODUCTION	Large scale industrial agriculture has a negative effect on our biosphere
8 DECENT WORK AND ECONOMIC GROWTH	Chemicals can endanger workers lives
3 GOOD HEALTH AND WELL-BEING	Pesticide can have negative effect on health

Source: Sustainable Development Goals and the Link to Organic, in https://www.natureandmore.com/en/sustainable-development-goals-and-the-link-to-organic
and DJNED- MOT, 2022

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5 GENDER EQUALITY

18 KELEMBAGAAN DESA DINAMIS DAN BUDAYA DESA ADAPTIF

??

MENGAPA ORGANIK MENYENTUH PEMBERDAYAAN PEREMPUAN?

SOSIALIASI TRANSFORMASI WOMEN ECONOMIC EMPOWERMENT

Benchmarks For

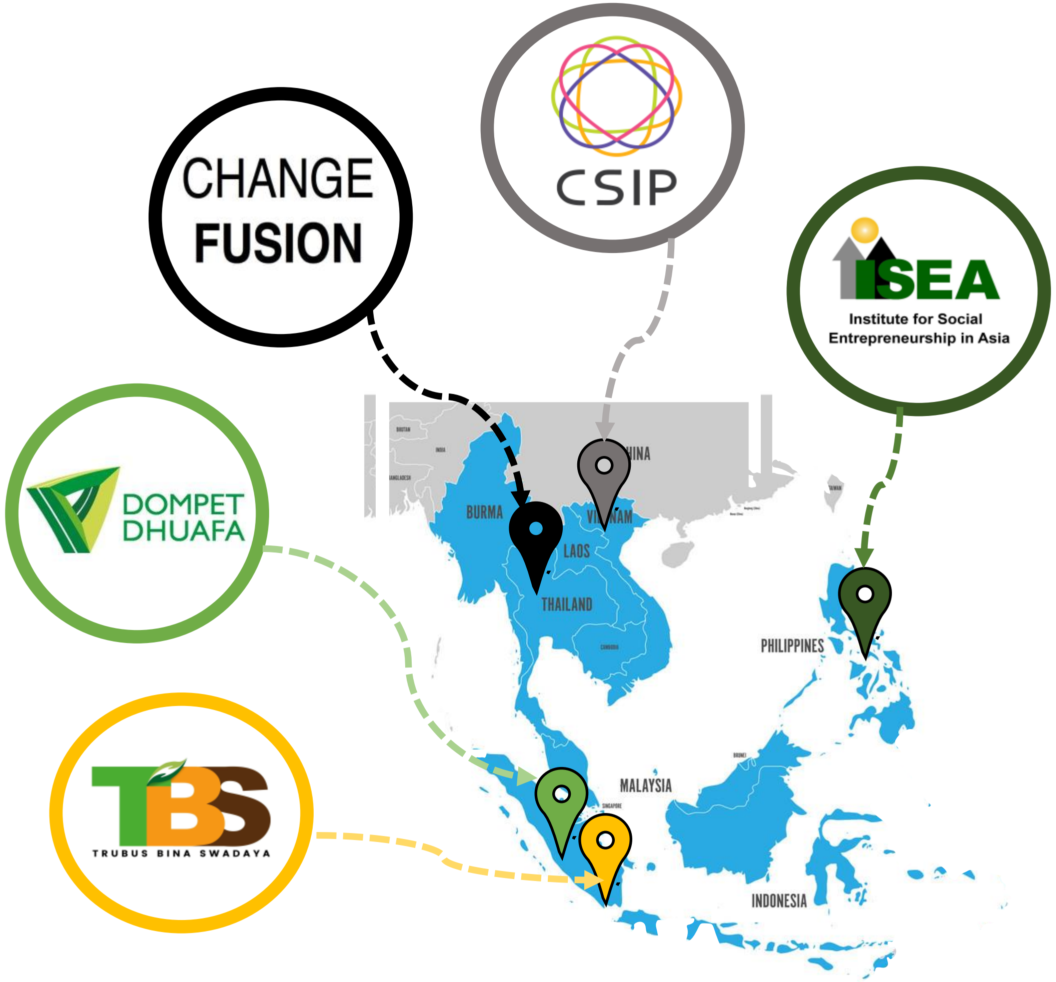
Transformational Partnerships and Women’s Economic Empowerment
And
Transformational Agriculture Value Chain Guidelines

Action Research: 8 SIGNIFICANT PRACTICES OF SOCIAL ENTERPRISES AND INCLUSIVE BUSINESSES IN AGRICULTURAL VALUE CHAINS (AVCS) IN ASEAN

- How were these grassroots women/small producers empowered?
- How can AVC interventions contribute to building a critical mass of empowered grassroots women/small producers like Pin, Wasti, Juanita, and Imelda?

ISEA and its partners undertook action research in the Philippines, Thailand, Vietnam, and Indonesia and have put together the most important results in a set of aspirational standards:

BENCHMARKS for TRANSFORMATIONAL PARTNERSHIPS and WOMEN'S ECONOMIC EMPOWERMENT in AGRICULTURAL VALUE CHAINS



SOME INSIGHTS FROM BENCHMARKING RESEARCH:
SERVICES PROVIDED TO SMALL PRODUCERS

Transactional Services

- Assist small producers to become better workers, suppliers, clients (roles involving exchange of goods or services for money)
- market-driven

Transformational Services

- Enable small producers to become conscious agents of change to improve their quality of life and that of their community, sector and society as a whole
- Primary-stakeholder-driven

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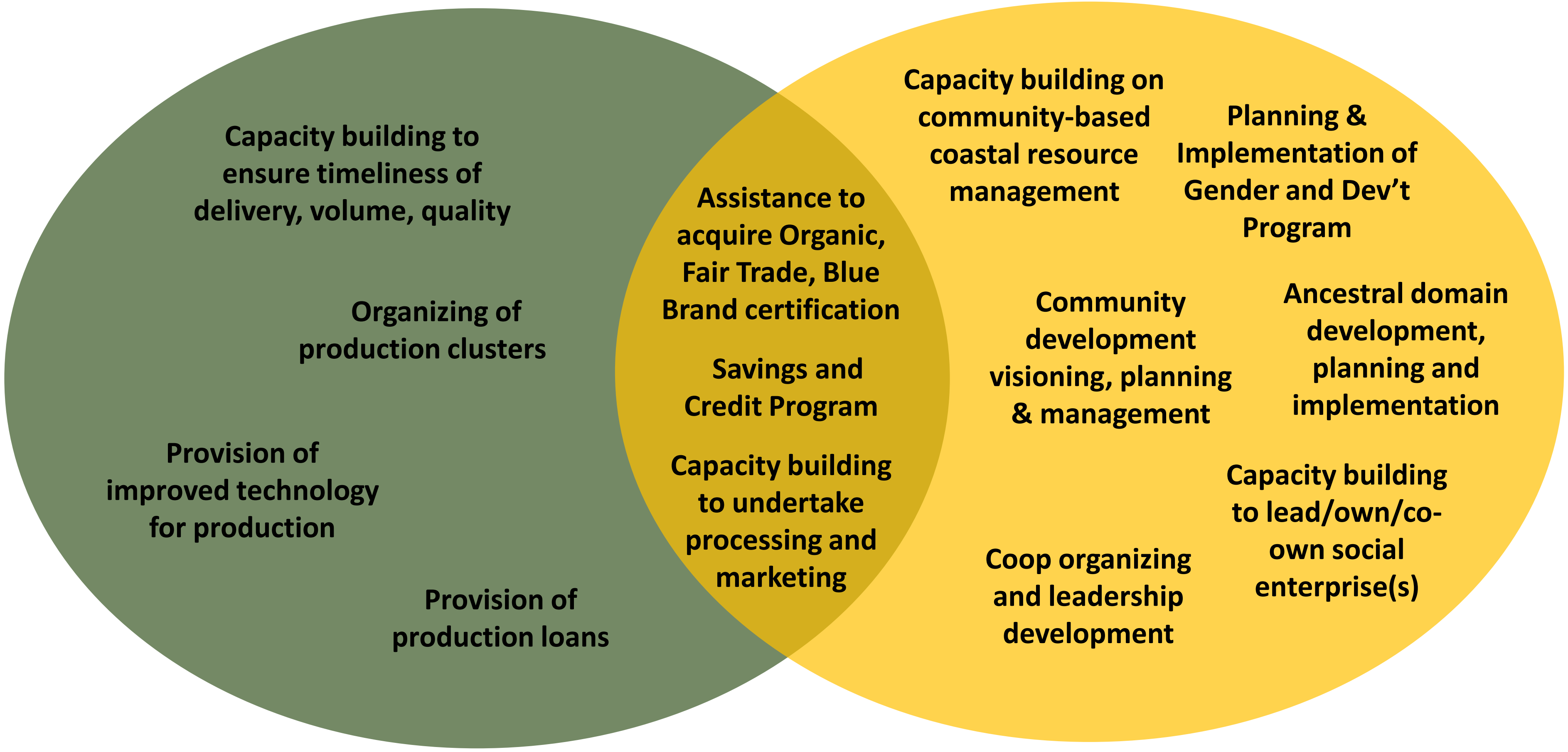
SOME INSIGHTS FROM BENCHMARKING RESEARCH:

TRANSACTIONAL AND TRANSFORMATIONAL SERVICES

PROVIDED TO SMALL PRODUCERS IN AGRICULTURAL VALUE CHAINS

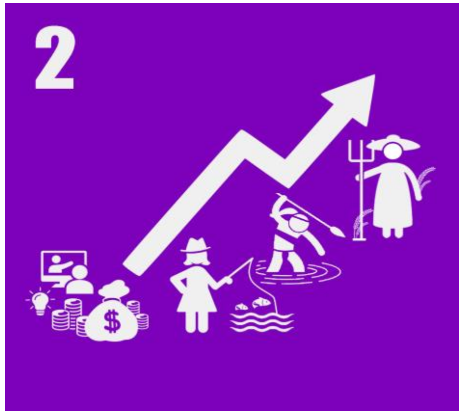
Transactional **Transformational**



Proposed Guidelines for Transformational Partnerships and Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

--> enable and incentivize the practice of the Benchmarks

INNOVATIONS toward food security, resilience and empowerment of small-scale producer communities



WOMEN'S ECONOMIC EMPOWERMENT across all functions of value chains

SUSTAINABLE CONSUMPTION and PRODUCTION towards a climate-resilient and green economy

Recognition and support for **SOCIAL ENTERPRISES** and **INCLUSIVE BUSINESSES** as innovators and key enabling partners

Cross-sectoral and multi-stakeholder **PLATFORMS** toward **ACCELERATING** the SDGs

Proposed Guidelines for Transformational Partnerships & Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

1

Main Guidelines	Sub-Guidelines
 **Enabling innovations that support AVC development for food secure, resilient, and empowered small-scale producer communities**	Promote appropriate, affordable, and accessible technology and community-oriented innovations that build on indigenous knowledge systems and are friendly to small-scale producers, especially women
	Enable women and men small-scale producers to reap their fair share of the wealth generated by AVCs
	Ensure food security and nutrition and the resilience of both women and men small-scale producers to health pandemics and natural, social, and economic disasters
	Enable the empowerment of small-scale producers in the agriculture, forestry, and fishery sectors to be the main actors of their own development

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Proposed Guidelines for Transformational Partnerships & Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

2

Main Guidelines	Sub-Guidelines
 **Enabling women's economic empowerment that spans all functions and organizations engaged in AVC development, management, and governance**	Invest in transparent and accountable value chain development practices that enhance women's participation and empowerment as stakeholders in production, consolidation, processing, marketing, and other functions that produce and deliver agricultural, forestry, and fishery products to markets
	Invest in transforming women small-scale producers in agriculture, forestry, and fishery, individually and in groups, into entrepreneurs, leaders, and stakeholders of enterprises and organizations

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Proposed Guidelines for Transformational Partnerships & Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

3

Main Guidelines	Sub-Guidelines
 **Mobilization of investments on sustainable consumption and production systems that enable women and men small-scale producers as stakeholders in achieving a climate-resilient and green economy**	Invest in and enable sustainable consumption and production systems that will empower women and men small-scale producers to become stewards of the natural resource base that sustains their livelihoods and enterprises
	Support investments and interventions that enable enterprises of small-scale producers to effectively adopt and adapt sustainable consumption and production technologies and practices in value chain functions beyond production

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Proposed Guidelines for Transformational Partnerships & Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

4

Main Guidelines	Sub-Guidelines
 **Recognition and support for social enterprises and inclusive businesses as innovators and key enablers of women and men small-scale producers in AVCs**	Recognize and enable social enterprises as key stakeholders in empowering women and men small-scale producers in AVCs
	Enable transformational models of inclusive businesses engaged with women and men small-scale producers by supporting their partnership with social enterprises and NGOs
	Invest in and incentivize AVC interventions that support transactional and transformational services among women and men small-scale producers through inclusive and hybrid financing

Proposed Guidelines for Transformational Partnerships & Women's Economic Empowerment in Agricultural Value Chains (Transformational AVC Guidelines)

5

Main Guidelines	Sub-Guidelines
 **Mobilization of support for social innovation platforms that mainstream sustainable agriculture, transformational partnerships, and women's economic empowerment in AVCs toward measurable social impact and accelerating the achievement of the SDGs**	Invest in and incentivize programs that support AVC stakeholders to co-create social impact and measure outcomes of transformation at the level of women and men small-scale producers, households, and communities, and value chains and economic subsectors
	Enable cross-sectoral collaboration and multi-stakeholder platforms that promote the practice and mainstreaming of the benchmarks toward accelerating the SDGs

Innovative Pathways to Sustainability & Empowerment of Women and Men Small-Scale Producers in AVC Development

AVC PRACTITIONERS

LEARNING, EVALUATION & PLANNING TOOLS

⇕

BENCHMARKS for

TRANSFORMATIONAL PARTNERSHIPS & WOMEN'S ECONOMIC EMPOWERMENT in AGRICULTURAL VALUE CHAINS

GOVERNMENTS

PROPOSALS in terms of POLICIES and INCENTIVES to SUPPORT PRACTICE of the BENCHMARKS

⇕

GUIDELINES for

TRANSFORMATIONAL PARTNERSHIPS & WOMEN'S ECONOMIC EMPOWERMENT in AGRICULTURAL VALUE CHAINS

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SDGs that social enterprises, inclusive businesses and AVC stakeholders adhering to benchmarks contribute to:

zero poverty, no hunger, reduced inequality (Goals 1, 2, & 10)

decent jobs and inclusive growth (Goal 8); inclusive and sustainable industrialization and innovation (Goal 9)

sustainable consumption and production (Goals 11 & 12); sustainable communities (Goal 17)

women's economic empowerment (Goal 5) as cross-cutting

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TERIMAKASIH

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