



KEMENTERIAN PERDAGANGAN
REPUBLIK INDONESIA

Indonesian Rattan
**A Natural
Marvel**

MINISTRY OF TRADE OF THE REPUBLIC OF INDONESIA

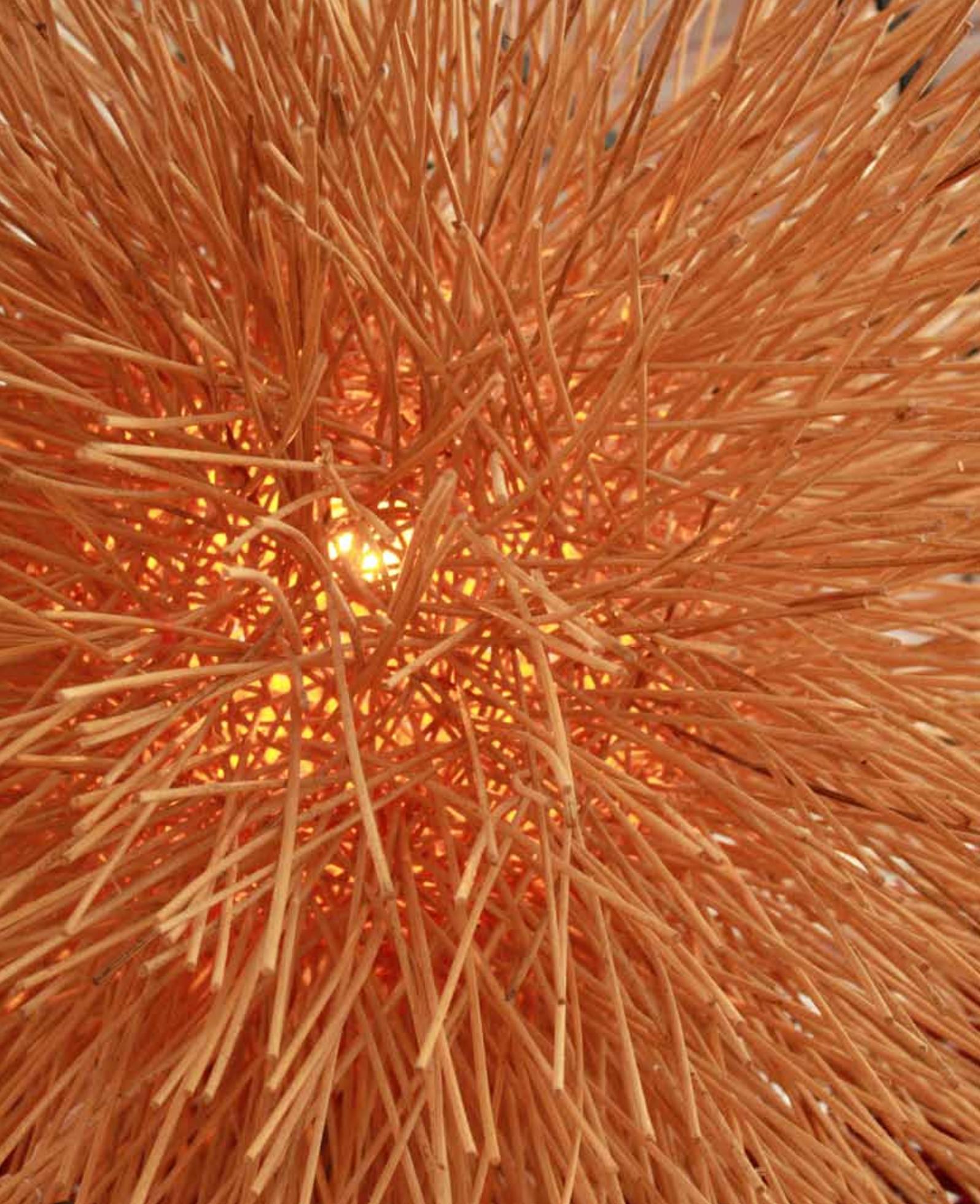


Handbook of Commodity Profile

“ Indonesian Rattan : A NATURAL MARVEL ”

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

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Introduction

The Trade Research and Development Agency is making continuous attempt to collect, analyze and present information on various products manufactured in Indonesia through printed media, and at this point, we proudly present information on Rattan Industry and Products of Indonesia.

This product profile gives picturesque information about rattan cultivation, processing and fabrication. Numerous people, including harvesters, workers, scientists, designers and manufacturers, have dedicated their expertise and craftsmanship for the development of this trade. Their works and creativities have contributed and given big influence to the rattan industry in the country.

The reader will enjoy reading the historical development of Indonesian rattan, starting from the centuries old method of harvesting to the modern way of using rattan to produce useful modern items. More interestingly, the reader will have imaginary journey to different provinces around the country and get the knowledge on Indonesian rattan and rattan products.

The book will give an illustration of Indonesian rattan and rattan products produced by national manufacturers of every scale and scope. Data will be presented as well to support the narrative of industry development.

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

Head of Trade Research and Development Agency (TREDA)



Minister of Trade
Republic of Indonesia

Message

It is our pride to share with you the information on the Indonesian rattan industry, one of the special types of numerous lines of Indonesian creative industries. Indonesia is rich of mineral resources and cultural beauty, which is reflected in the creation of the traditional and modern rattan products.

Besides its decorative factors and functions, most importantly, rattan has potential economic benefits for the millions of people and organizations involved in this industry. These professionals have made substantial inroads into the international market. Indonesian rattan is an important source of revenue for the country and livelihood of its people.

The Indonesian government, trade associations, community, and businesses have work together amazingly for the development of the industry. This booklet documents their effort and is presented to the readers who are interested in exploring the richness and economic potentials of Indonesian Rattan.



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all is vine



Rattan is the name given to hundreds palm species. Most rattan is processed and used for furniture and baskets. In the rattan industry, Indonesia occupies a unique position in the world. Indonesia is the world's largest producer of natural rattan, with some even put the figure as far high as 85% of the total. Competition traditionally comes from the neighboring Malaysia and the Philippines, as well as from Bangladesh and Sri Lanka.

Within these producing countries, the value of rattan is more than just commercial. Rattan is everywhere, in everyday items, influencing everyday activities, and necessary items for many communities. There is a whole economy based on rattan.

In terms of trade, Indonesia exported various rattan items valued at more than a quarter of billion dollars for the past 5 years. The rich countries in Europe, USA and Japan were the major consumers. Rattan is not native to those countries, but they consider rattan products to be luxury items, something only the affluent members of society will own.

Yayasan Rotan Indonesia (Indonesia Rattan Foundation), an organization located in Jakarta, estimates that the country has around 5 million farmers and gatherers nationwide. A large proportion of them are poor villagers living in the resource rich but industrially under-developed islands of Kalimantan and Sulawesi (also known as Borneo and Celebes). Most of the furniture and basket manufacturers, as well as exporters and distribution centers, however, are located in Java. Therefore, developing the rattan industry is an important element in the national government's policy to lessen the development gap in Indonesia.

Rattan is commercially important.

Rattan is a staple of everyday lives.

Rattan is a strategic issue at the national level.

Rattan is an inherent part of Indonesian culture.

introducing the Rattan

The English word rattan is derived from Malay's rotan. Indeed, the Malay world is the source of most of the world rattan materials and products. And among the countries producing rattan materials, Indonesia is the leader. Some even estimates that Indonesia has 70% of rattan population and about 85% of raw material production.

When a person speaks about rice, he or she is talking about the species *Oryza sativa*. Pineapple is *Anana cosmosus*, corn is *Zea mays*, while carrot is *Caucus carota*. But rattan, taxonomically speaking, is not a species. It is not even a genus. Several plants from different genus and species are collectively referred to as rattan because they share a common traits and habits.

Scientifically speaking, the term rattan encompass a group of roughly 600 species of palms in the sub-family Calamoideae, plants that are native to tropical regions of Asia, Africa and Australasia. The sub-family also includes tree palms (such as *Raphia* and *Metroxylon*) and shrub palms such as *Salacca*. There are 13 genera of rattan.



Plant



Characteristics of the Rattan Plant

Rattans are spiny, climbing plants. Although some of the species, in fact, do not climb, being shrubby palms of the forest undergrowth; they share characteristics that linked them to the climbers, and therefore included in the rattan genera.

Although sometimes can be confused with bamboo, rattan can be distinguished by its solid canes, whereas bamboos are almost always hollow. Rattans have long and flexible stems that need support. In favorable conditions, some species may grow to very great length. One of the longest recorded canes is over 175 m long.

Some species are single-stemmed while others are multi-stemmed. Single-stemmed species can only be harvested once, while the multi-stemmed ones can be harvested sustainably. Surrounding the stem are sheathing leaf bases which are nearly always fiercely spiny, the spines are sometimes arranged in neat rows and interlocking to form galleries in which ants make their nest, to provide extra protection to an already well protected plant. This may prevent animals from feeding on the tender growing point (called "cabbage"), hidden within the leaf-sheaths. In addition to sheath spines, rattans usually have whips, either on the leaf sheaths or at the ends of the leaves. They are armed with grouped, grapnel-like spines and play a major role in supporting the rattan as it climbs in the forest canopy. These whips and spines make collection unpleasant and difficult, contributing to our minimal scientific understanding of the rattan plant.

Geographical Distribution of Rattan

Rattans are predominantly plants of primary rain and monsoon forest. But their habitats range from sea level to over 3,000 m elevation, from equatorial rainforests to monsoon savannahs and the foothills of the Himalayas. There is a huge range of ecological adaptation among rattans.

Rattans are distributed in tropical and subtropical areas in the Asia-Pacific region and Africa. No rattans are found growing naturally in other tropical and sub-tropical areas, or in the temperate regions.

A 2002 study by UNEP-WCMC (United Nations Environment Programme's World Conservation Monitoring Centre) identified 45 countries which potentially contain rattan resource. The following table lists the many species of rattan. Based on the study, the top 5 countries with high rattan diversity are all South East Asians (Indonesia leads with 246 species of rattan, followed by Malaysia, the Philippines, Brunei, and Thailand).

Distribution and ecology of 13 genera of Calamoideae

Genus	Number of species	Distribution	Ecology
Calamus	370	All areas	No species in semi-arid habitats. From sea level to 3000 m
Calospatha	1	Malaysia	
Ceratolobus	6	Malay peninsula, Java, Sumatra, Borneo	
Daemonorops	115	From India and south China through the Malay Archipelago to New Guinea	Primary tropical rain forest on great variety of soils
Eremospatha	12	West Africa, Congo Basin, eastward to Tanzania	Rain forest, swampy soil
Korthalsia	26	Sunda Shelf, Indochina, Burma, Andaman Islands, Sulawesi, North Guinea	Lowland and hill tropical rain forest, absent in montane forest
Laccosperma	7	West Africa, Congo basin	Rain forest, swampy soil
Myrialepis	1	Indochina, Burma, Thailand, Peninsular Malaysia, Sumatra	From sea level to 1000 m, prefer disturbed sites in primary forest.
Oncocalamus	5	Equatorial west Africa and the Congo Basin	Lowland tropical rain forest
Plectocomia	16	From Himalayas, south China and Hainan, through Burma and Indochina to the Sunda Shelf and the Philippines	From sea level to 2000 m in the mountains.
Plectocomiopsis	5	South Thailand, Peninsular Malaysia, Sumatra, Borneo	Wide range of forest types, up to 1200 m altitude
Pogonotium	3	Malay Peninsula, Sarawak	700-1000 m altitude, transition between lowland and montane forest
Retispatha	1	Borneo	Hill dipterocarp forest, absent from montane and heath forest

Source (UNEP-WCMC, 2002)

Of those 600, around 50 species are traded commercially. Rattan takes time to regrow and seldom sustainably managed. In many parts of the world, over-exploitation and loss of habitat (e.g. due to farming, plantation or human settlement) have led to dramatic drop in rattan resource.

About 95% of rattan raw material consumed in the main production centers in Java originates from other islands—Sulawesi, Kalimantan and Sumatera—and a small quantity from Nusa Tenggara and Irian Jaya. Large diameter rattan species commonly used are lambang ombulu, seuti (*Calamus omatus*), tarumpu, mandola, semambu (*Calamus scipionum*), sampang, manau (*Calamus manan*), noko, tohiti (*Calamus inops*) and uban, while the small diameter rattan species are sega (*Calamus caesius*), jahab (*Calamus trachycoleus*), pulut (*Calamitis impar*), locek, datuk, jarmasin and cacing (*Calamus adspersus* Bl.).

Harvesting Rattan

In many media, the term “farmers” is frequently used, but in reality most rattan raw material is gathered from the wild tropical rain forest, especially the forest of Kalimantan (Borneo), Sulawesi (Celebes) and Sumatera. There have been many efforts to plant and cultivate rattan, but the results are still less than satisfactory.

In a small area of Kalimantan, for example, rattan has been cultivated in permanent rattan gardens on land adjacent to rivers that flood severely and for a prolonged period. The flood and the acid soils seem to be ideal for cultivation of one rattan species, *Calamus trachycoleus* or jahab. However, jahab has canes of small diameter (6-12 mm). For production of rattan chair, larger diameter (more than 18 mm) is needed to make the framework. In the industrious Java, the main manufacturing center of rattan end-products, Perhutani (a government-owned company in charge of managing the island’s forest resource) has also tried to plant rattan. The effort has yet to yield satisfactory result.

The knowledge required for collecting and cultivating rattan has traditionally been passed from generation to generation. Villagers usually travel in a group of 3 to 5 people to the forest. Rattan collection is simple: the gatherer needs a machete for cutting the rattan and removing the sheath, plus the strength to pull it down from the treetops. Tools used in the process include a hook-like knife tied to the end of a long straight cane or piece of bamboo to isolate climbing rattan and tug on them until they fall. Simple in principal, but may not be so in reality. Rattan-harvesting can also be a dangerous business, as dead branches might be dislodged as the rattan is pulled and ants and wasps can disturbed the process.

Rattan harvesting can be a wasteful process, as the top portions of the cut stem may have to be left behind if they are still entangled in the forest canopy after the gatherer has climbed a neighboring tree to try to free them. The mature stem, cut above the ground, is normally twisted around a



tree trunk as it is dragged down, to rid it of the spiny leaf-sheaths. The immature uppermost several meters of the stem are discarded, the stem cut into lengths of 2-3 m for large-diameter canes, and of 5-7 m for small diameter canes.

Processing Raw Rattan

From the forest, only the bare canes are carried out to be processed. They are usually cut into smaller pieces to ease transportation out of the forest. Small diameter canes are dried in the sun and often smoked over burning sulphur, while larger ones are boiled in oil (often a mixture of diesel oil and palm oil) to remove excess moisture and natural gums. This process also prevents wood-boring beetles from attacking the canes. Cured canes can fetch a higher price at domestic and export markets.



In general, large-diameter canes have to be cured with a hot oil mixture within 1-2 days after harvesting to prevent deterioration. This treatment is said to make the canes durable by removing gums, resins and water. The oil mixture varied in different places and there has been no widely acceptable standard prescribing a certain method. However, the mixture may be of diesel, kerosene or coconut oil. The curing bathtub is usually a trough made either of galvanized soft iron sheeting or of longitudinal halves of empty oil drums welded together. The trough of oil is heated by burning wood underneath, but more sophisticated processor may also use better equipment such as LPG burners, and the canes are immersed in the hot oil (100-250o C) for 30 minutes or more.

After curing, the canes are removed and rinsed or scrubbed the oil from the surface. They are then placed upright in the open to be sun-dried. The period of drying varies from 1-3 weeks, depending on the species and weather conditions. The dried canes are then bundled and stored before being transported. Further processing may include bleaching and fumigation. Similar to curing, there are no scientific researches on the effect of these processes on the strength and value of the rattan materials, and therefore practice will vary from place to place.

Quality and Grades of Rattan

Grading may not be too important for domestic and village use, but it is a crucial phase in commerce. Given the fact that natural products will have variations in properties and quality, and given that the stakeholders are many (producer, processor, trader, exporter, importer, manufacturer, consumer, etc.) and may reside in different places and countries that may have different rules, standardizing and harmonizing the grading system is very complex. A standardized rule has been proposed by the International Network for Bamboo and Rattan or INBAR since 1996 (INBAR Working Paper No. 6). And yet, in spite of these many efforts, traditional grading systems in many countries persisted.

Pre-processing grading phase usually looks at the dimensions, hardness, and defects (for example discoloration from fungi, breaks, scars, etc.), while post-processing grading will group rattans based on their surface colors, brightness, and glossiness. We can see that many of the qualities are evaluated subjectively, relying on people's perception and visual evaluation. Add to this complexity the fact that one rattan species may have different trade names in different countries, while a trade name can have different meanings in different countries.







one plant for everything

For centuries, villagers of South East Asia have use rattans for many purposes, such as cordage, construction, basketry, thatching and matting. If one wants to catalog the items made by rattan, the list would be long and extensive: baskets, mats, furniture, broom handles, carpet beaters, walking sticks, fish traps, animal traps, sunblinds, birdcages, etc. Other uses include staves or cane for martial arts and handles for percussion mallets. In construction, many houses, fences, bridges and even boats are bound together with rattan, and, in many instances, they do this without the use of a single nail. Ropes for tethering buffaloes, mooring ropes, and anchor and bridge cables can also be made from rattans. Old rattan leaflets are woven for thatching, young leaflets are used as cigarette papers, while young shoots or 'cabbage' are eaten. Some believe rattan have medicinal properties. Rattan fruits variously used as fruit and medicine, and 'Dragon's blood' obtained from the fruit of a few species was previously used as dye, varnish and in local medicine.

In commercial sense, though, rattans are primarily used for construction of furniture and baskets. Roughly about 20% of the species are used commercially. They can be in whole or round form, especially for furniture frames, or sin splits, peels and cores for matting and basketry. However, recent development in technology has brought us a rather unusual application of rattan: the production of artificial bone.

Furniture

The furniture industry is the main consumer of raw rattan materials. Rattan is bent, woven, and tied to make chairs, beds, tables and cabinets for the world market as well as for domestic usage. Rattan furniture has been produced since Classical times. The furniture is elegant, stylish and very popular in many countries. Although most villagers in many raw-material producing countries may take rattan for granted, the furniture buyers in rich countries perceived them as luxurious items. In the past, those rich countries imported the raw materials and manufactured their own furniture, but nowadays, raw-material producing countries, such as Indonesia and Malaysia, have developed their own manufacturing prowess and can gain more from the value of a finished goods.

Indonesian businesses have grown strong in more than just manufacturing, but also in design. Richness in available materials and limitless creativity of Indonesian artisans have produced remarkable furniture product with rattan as its sole, main or supplemental parts. In the market today, rattan furniture are available in various designs, from the traditional to the contemporary. Recent designs have merged rattan with various other natural materials like wood, sea-grass, or abaca, and fabricated materials like steel and plastic. The products proof to be popular in domestic markets as well as overseas.



Basketry and Other Wickerwork

In traditional village or forest dwelling communities, rattan is used to make baskets, nets, mats, and even bridges. Of course, modern societies have found other materials and technologies that replace rattan in much of those roles: metal and concrete for bridges and plastic for baskets, nets, and mats. Rattan is still used, though, because of its artistic and exotic qualities, and the products are still viewed as exclusive items that can fetch high prices. Nevertheless, in the modern world, the total commercial value is not as high and the use is not as widespread as in furniture.



Stave, Cane, and Stick

Due to its durability and resistance to splintering, sections of rattan can be used as staves of canes for martial arts. Long rattan sticks (about 70 cm long) called bastons are used in Filipino martial arts, especially Modern Arnis and Eskrima. The flexibility and durability of rattan canes make them an effective instrument for inflicting disciplinary pain, i.e. caning, in some societies. Broom handles, carpet beaters, and walking sticks are other examples.

Resin

The fruit of some rattan species exudes a red resin called—rather exotically—dragon’s blood. In antiquity, this resin is thought to have medicinal properties. Today, it is frequently used in dyeing, for example in violin manufacturing. The resin usually creates a light peach hue.



Artificial Bone

In early 2010, scientists in Italy announce a rather unusual use of rattan. In its “wood to bone” process, rattan is used to make artificial bone. At the time of the announcement, this artificial bone was being tested in sheep without any sign of rejection. Particles from the sheep’s bodies have migrated to the “wood bone” and formed long continuous bones. The test was conducted in Istec Laboratory of Bioceramics in Faenza, near



Bologna. The new program is being funded by the European Union and application in humans are planned to start in 2015.

The artificial bone is almost identical to human tissue. The process begins by cutting long rattan tubular canes into manageable pieces. It is then snipped into even smaller chunks, ready for the complex chemical process to begin. The pieces are put in a furnace and heated. In simple terms, carbon and calcium are added. The wood is then further heated under intense pressure in another oven-like machine and a phosphate solution is introduced. After about 10 days, the rattan wood has been transformed into the bone-like material.

Rattan Industry in Indonesia

Rattan is one of the world's most important non-wood forest products. In his 1980 paper, K.D. Menon suggested that in South East Asia, it is estimated that over 5 million people are involved, directly and indirectly, in rattan industry. Trade in raw rattan amounted to US\$ 50 million, however by the time manufactured products reached consumers, the value has jumped to about US\$ 1.2 billion. Hence, we can presume that much of the value in the products is added in the processing, manufacturing, distributing and marketing phase. As the most dominant producer of rattan raw material, Indonesia has been trying to keep as much value as possible at home.

As previously stated, the island of Java is the manufacturing center of end-product (mainly furniture and wickerwork), while the other islands (Sulawesi, Kalimantan, Sumatra, etc.) supplies the raw materials. In Java, the factories are mostly located in West Java (especially in the Regency of Cirebon) and East Java (especially in and around the provincial capital of Surabaya).



The following table shows the distribution rattan industry in Indonesia by the end of the 20th century. The data is taken from a paper written by Soedarto Kartodihardjo of the Ministry of Forestry and Estate Crops and available at INBAR website.

Distribution of Indonesian rattan industry in 24 provinces

No.	Provinces	Total Industry	Production Capacity (ton/year)	
			Semi finished product	Finished product
1	Aceh	3	885	980
2	North Sumatra	14	14,171	14,054
3	West Sumatera	16	15,487	8,419
4	Riau	8	7,627	5,712
5	Jambi	2	3,160	-
6	Bengkulu	1	-	3,600
7	South Sumatra	2	1,796	276
8	Lampung	4	780	1,008
9	DKI Jakarta	28	5,662	25,626
10	West Java	169	53,460	218,830
11	Central Java	7	2,580	22,668
12	DI Yogyakarta	2	-	1,280
13	East Java	96	155,064	148,497
14	Bali	1	-	23
15	West Kalimantan	7	33,610	8,208
16	Central Kalimantan	17	23,274	14,219
17	South Kalimantan	55	31,985	29,627
18	East Kalimantan	8	5,142	2,163
19	North Sulawesi	24	51,251	2,540
20	Central Sulawesi	54	112,495	15,352
21	South Sulawesi	30	46,341	10,186
22	South-east Sulawesi	27	50,648	90
23	West Nusa Tenggara	8	4,220	-
24	Maluku	1	-	300
	Total	584	619,637	533,658

Source: INBAR

In studying the data further, one will notice that the provinces of Java (DKI Jakarta, DI Yogyakarta and West, Central and East Java) represent 52% of all the rattan companies with a combined capacity of 35% and 78% for semi-finished and finished products respectively.



Kalimantan

Of the 300 species in seven genera documented in Indonesia, approximately 100 occur in Kalimantan. Only nine or ten commercial types are widely traded in East Kalimantan, although many non-commercial varieties are used by indigenous people.

Dominating the trade are *Calamus caesius*, *C. Manan*, *C. Trachycoleus*, and *C. scipionum*. But as world trade increases and wild supplies are exhausted lesser known canes are likely to be adapted to the market. In 1979, about 7,000 tons of rattan was produced in East Kalimantan, about 4,405 of which were exported. These quantities are probably much higher as some rattan is sold via neighboring South Kalimantan. The Ministry of Forestry estimates that the province could produce 11,650 tons from wild sources annually.

Sulawesi

Sulawesi is an important source of rattan raw material. Among the six provinces on the island, Central Sulawesi is perhaps the most important source of wild rattan. here, wild rattan covers about 5 million ha of forest area, or about 57.5% of the country's total area under wild rattan. In addition, the City of Makassar in South Sulawesi is a crucial trading center of rattan. From here, rattan raw material can be exported or traded to Java.

For illustration of the importance of Sulawesi to the rattan trade, we can take a look at a 1995 data provided by INBAR. The following table shows the source of raw materials to the provinces of West, Central, and East Java.

Percentage Share of All Rattan Reaching East Java

North Sulawesi	20.44%
Central Sulawesi	33.97%
South Sulawesi	32.04%
South-East Sulawesi	10.21%
Total Share of Sulawesi's Rattan in East Java	96.66%

Source: INBAR



Central Java

Rattan furniture manufacturing in Central Java Province is divided into its northern, coastal regions and its southern, inland regions. In the northern cities like Semarang, the provincial capital, and Kudus, the companies tend to be big and export-oriented. Jepara, a center of wooden furniture and woodcarving in general, rattan is combined with wood to create outstanding products that have long sought by importers in various countries. In the south, however, production is centered in the area of Trangsang in Sukoharjo Regency and the companies are smaller. They are the smaller version of Cirebon, an industry at its early stage of development.

West Java

Rattan industry in West Java is located in Cirebon Regency. Here, furniture manufacturing is strong in its wickerwork. Their main market is the affluent market of Europe. The industry comprises of businesses large and small, even home industries. Although competing for buyers, those companies have good relationships with each other. Partnership between big business and the surrounding communities and home industries is crucial in maintaining Cirebon's competitive edge in the furniture industry.

Cirebon's fame is not just for local market but also foreign markets. And in keeping with its leadership position in the rattan industry, Cirebon's business community is building an institution called IRDIC (Indonesia Rattan Development and Information Center). Its role is to lead a promotion campaign for rattan and rattan product to the market (both national and international), to be a development center of rattan design and processing, and to house various rattan items and history in its museum section.



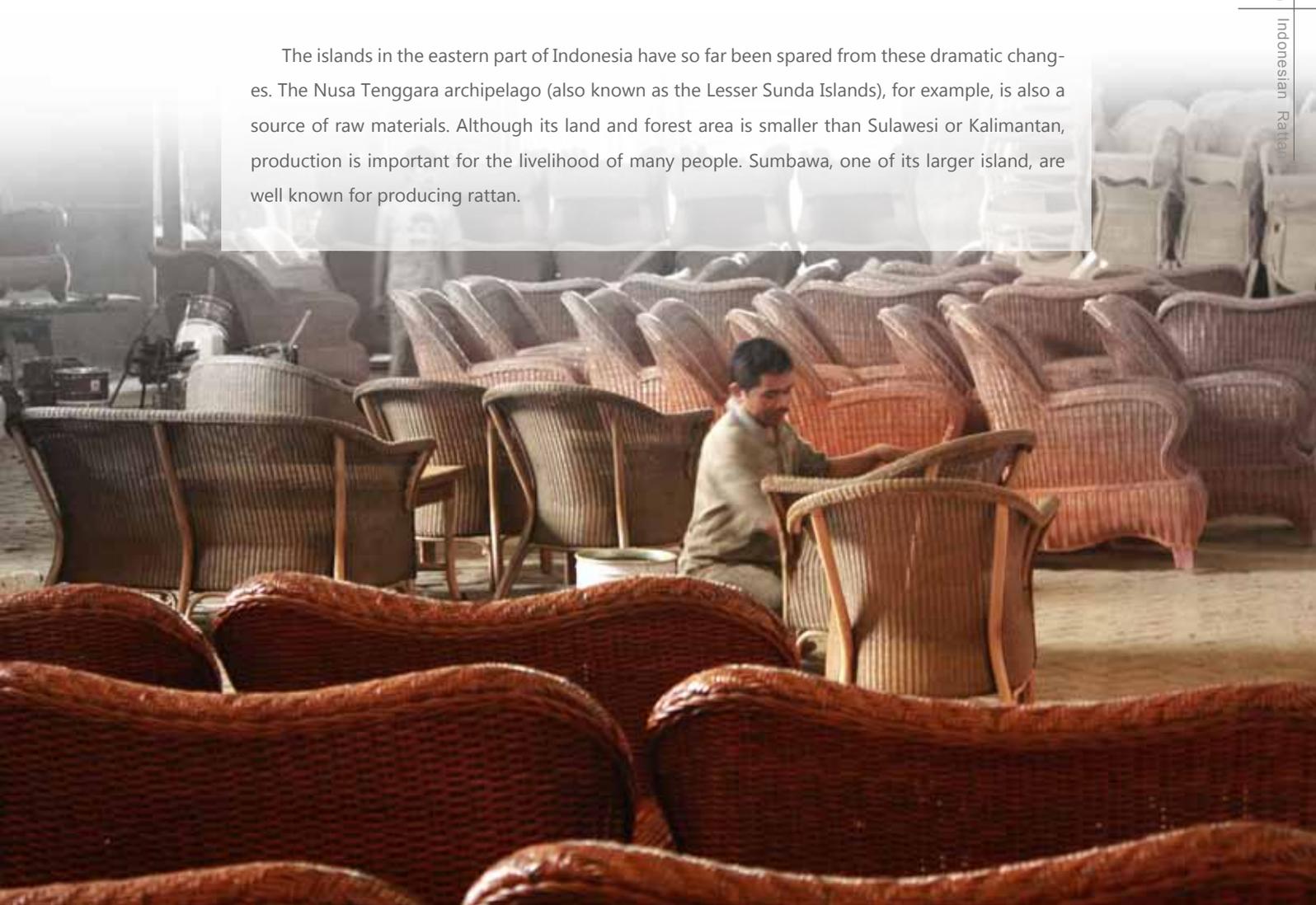
East Java

Rattan industry in East Java is dominated by big factories which produce furniture for the US market. Surabaya is the capital of East Java Province. The city is known for its manufacturing prowess, with many big factories and industrial estates, and its large port, Tanjung Perak. East Java's rattan industry is located in Surabaya and the surrounding areas. To the south are the regencies of Sidoarjo and Pasuruan, also the location of many factories. Pasuruan is a major center of handicraft and a producer of furniture. Although the main material is wood, rattan—whether combined with wood or not—is also a thriving industry. In Menganti area of Gresik Regency, north of Surabaya, another center of rattan furniture manufacturing is located.

Other Areas

With one of the largest rainforest in the world, natural rattan resource can be found in virtually every island. In addition to the above mentioned areas, the island of Sumatra is one of the most important. As one of Indonesia's largest island, it has a large rattan potential. This potential, however, is underutilized and under-appreciated compared to the other islands. Today, a huge portion of Sumatra's natural forest has been converted into human settlement, farmland, and, the most threatening of all, palm plantations.

The islands in the eastern part of Indonesia have so far been spared from these dramatic changes. The Nusa Tenggara archipelago (also known as the Lesser Sunda Islands), for example, is also a source of raw materials. Although its land and forest area is smaller than Sulawesi or Kalimantan, production is important for the livelihood of many people. Sumbawa, one of its larger island, are well known for producing rattan.



Sustaining The

Ministry of Trade

The Ministry of Trade holds a crucial position in the industry as the regulator of export and import of rattan materials and products. There are a numbers of regulation enacted by the Ministry in regards to rattan export. Between 2005 and 2010, there are at least five Ministerial Regulations published to regulate the rattan trade.

The export policies were aimed to increase export value by reducing export of raw and semi-finished products and, at the same time, encourage growth of rattan manufacturing. The limit of export was also developed to increase sustainability of rattan resource by preventing over-exploitation.

Ministry of Forestry

The Ministry of Forestry is the government department in charge of regulating and managing Indonesia's vast forest resource. It has recently put rattan as one of 5 strategic non-wood forest products along with gum resin (gondorukem), silk (sutra), honey (madu) and cajuput oil (minyak kayu putih). A new guideline for managing rattan resources will likely to follow soon. In addition, the Ministry also oversees and guide the management of various state-owned forestry companies known as Perhutani and Inhutani.

Rattan Industry

State-Owned Enterprises in the Forestry Sector

The Indonesian Government owned 6 companies working in the forestry sector. They are Perum Perhutani (State Forestry Corporation) and Inhutani I-V (Forest Industry and Exploitation Corporation I-V). Each has the responsibility in sustainably managing and developing state forest in various parts of Indonesia. Perum Perhutani operates solely in Java, while the five Inhutani companies manage forest concessions in the other islands (Sumatera, Kalimantan, Sulawesi, etc). Perhutani's operation is divided into 3 regions: West, Central and East Java. Those regions are further divided into district offices called KPH or Kesatuan Pemangkuan Hutan. The majority of Perhutani's rattan resources originated from the KPHs in the western part of Java.

Perum Perhutani sells some naturally-grown rattan harvested from its area of concession in Java. However, natural rattan resource in Java is scarce since most of the island's terrain has been converted to human settlements and farmland. Responding to this situation, Perhutani has tried to develop commercial-scale rattan plantation since the 1980s.

Government-Sponsored Commercial-Scale Rattan Plantation

Given the strategic nature of rattan, Indonesian Government has worked on a couple of projects to develop rattan plantation. Most of the work is done through Perhutani and Inhutani. The development of rattan plantation in Java started as a pilot project in 1982. The planting began in 1983 in West Java. The seedlings needed were first imported from other islands, but Perhutani later developed seed orchards in Bogor and Cianjur. In 1994, rattan germination center was established in Jonggol using seeds from KPH in Bogor and Cianjur. Although similar plantation projects also existed in Central and East Java, about 50% of rattan plantations are located in West Java. This is mainly because of availability of ecologically suitable sites.

There are two techniques used by Perhutani: agroforestry in production forest areas, and enrichment planting in protected and natural forests. The species chosen are those with high economic values such as sega (*C. caesius*) and manau (*C. manan*). Other species such as see1 (*Daemonorops*



melanocbaetes) and seuti (*C. ornatus*), known as the local species, are also planted to a limited extent.

Commercial-scale rattan plantations are located mainly in production forest (a forest earmarked for the extraction of timber and non-timber products) areas where the main tree species are teak (*Tectona grandis*), merkusi pine (*Pinus merkusii*), mahogany (*Swietenia macrophylla*), agathis (*agathis* sp.), rasamala (*Altingia excelsa*), puspa (*Scbima* spp.), etc. These tree species are considered to be capable of providing suitable support for rattan.

In Kalimantan, Inhutani III is developing rattan plantation using its 4,400 ha of landholding in Central Kalimantan. The company is not new in rattan industry. They previously buy rattan from vil-

lage gatherers and then processed and export them. Its annual production exceeded 200 tons and about 70% was exported to China and Thailand, earning IDR 1,6 billion in the process.

Government Financial Support

Government runs various schemes to provide financial support for businesses, especially small and medium scale companies. State-owned banks provide easy credit for small companies and entrepreneurs from less-developed areas. In addition, other state-owned companies also have CSR projects that help finance SMEs or assist them in marketing and training.

The International Network for Bamboo and Rattan (INBAR)

The International Network for Bamboo and Rattan (INBAR) is an intergovernmental organization dedicated to improving the social, economic, and environmental benefits of bamboo and rattan. INBAR connects a global network of partners from government, private, and not-for-profit



organization in over 50 countries to define and implement a global agenda for sustainable development through bamboo and rattan.

INBAR can trace its history to the period of 1979-1980 when Canada's International Development Research Centre (IDRC) arranges meetings on rattan and bamboo. In 1993, on a meeting in New Delhi, India, INBAR was formed as part of IDRC. Its aimed was to improve contribution bamboo and rattan make to rural livelihoods, and to investigate the role of bamboo and rattan in tropical forest conservations. In the 1990s, realizing its limitations as part of the IDRC, groups of countries and organizations pushed for INBAR independence, with China offered to host its headquarter. On November 6, 1997 in Beijing, China, nine founding members (Bangladesh, Canada, China, Indonesia,

Myanmar, Peru, the Philippines and Tanzania) attend the signing ceremony of INBAR as an independent intergovernmental organization.

In 10 years, INBAR has grown from its membership from 9 to 34 countries and organizations (11 from Asia, 12 from Africa, 10 from Latin America, and 1 from North America). It has regional offices in Ecuador, India and Ghana, with country representation in the Philippines, Italy and Colombia, and over 130 affiliates all over the world.

Indonesia is an active and founding member of INBAR. Scientists, academics and officials from Indonesia have contributed many researches and papers to INBAR. Representing Indonesia is the Ministry of Forestry and Warsi (Indonesian Conservation Community), a non-governmental organization.

Scientific Institutions

Indonesian Institute of Sciences or LIPI is an agency of the Government of Indonesia that works to promote scientific research. It operates various institutes and laboratories all over the country. Among them is Research Center for Biology in Bogor, West Java. The center runs and coordinates researches on biology and biodiversity.

More famous is the Botanical Garden. Indonesia has 4 in full operation in Bogor, Cibodas (West Java), Purwodadi (East Java), and Bedugul (Bali) covering more than 400 hectares in land area. All four are managed by LIPI's Indonesian Botanical Garden unit in Bogor. Sixteen other botanical gardens in 14 provinces are in the planning and early development stages, including Enrekang (South Sulawesi), Baturaden (Central Java), Solok (West Sumatera), Samosir (North Sumatera), Sungai Wain (East Kalimantan), Danau





Lait (West Kalimantan), and Lombok (West Nusa Tenggara). Bogor Botanical Garden is the oldest and has over than 15,000 plant collections, including 47 of rattan species.

Trade Groups and Associations

ASMINDO

The Indonesia Furniture Industry and Handicraft Association or ASMINDO is an influential association of various companies in furniture and handicrafts. ASMINDO regional offices and committees exist in producing regions, such as Jepara, Bali, and Cirebon. They conduct training sessions for start-up companies or young craftsmen. The association also coordinates various promotion events inside and outside the country. They regularly send members for exhibition in prospective markets like USA, China Japan, or Germany. International Furniture and Craft Fair Indonesia (IFFINA) is a large annual exhibition hosted by ASMINDO in Jakarta.

AMKRI

Indonesia Rattan Furniture and Craft Association or AMKRI is another important association, this one specifically accommodate rattan companies and entrepreneurs. One of its program is IRFDA (Indonesian Rattan Furniture Design Award), an award to recognize and nurture talented designers and original and excellent designs. AMKRI also work together with the Government of Indonesia or regional governments to formulate legislations and policies. One of its proposal is the establishment of Indonesian Rattan Development and Information Center (IRDIC) in Cirebon.

Yayasan Rotan Indonesia (Indonesian Rattan Foundation)

Yayasan Rotan Indonesia is a scientific organization located in Jakarta. Its mission is to actively promote the use of rattan, conserve Indonesia's rattan heritage, and enhance social and economic benefits of rattan cultivation to all stakeholders.

rattan



in Trade

History of the World's Rattan Trade

A publication released by Prosea Foundation in 1994, titled "Plant Resources of South-East Asia 6: Rattan" shed some light on the enormous potential of rattan trade. The book reported that international trade in rattan dates back to the mid-19th century (although village-level utilization in Asia has existed for centuries). When the Portuguese opened up trade between Europe and Asia, rattan was one commodity that the Westerners are interested in.

At the turn of the 20th century, Singapore has become central to the rattan trade in the region. Practically all rattan output of the South-East Asia and the Western Pacific was managed from here. For the period of 1922-1927, Singapore exported thousands of tons of rattan, mainly to Hong Kong, the US and France. Much of the raw material from Kalimantan (Borneo) was re-exported through Singapore and Sulawesi (Celebes), but most processing was done elsewhere.

By the 1970s, Indonesia had become the main supplier of rattan, supplying about 90% of world demand. On the other hand, Singapore, which has no natural rattan resources, earned more than US\$ 21 million (figure for 1977) from processing and converting rattan into semi-finished products. About 90% of Singapore's requirement was supplied by Indonesia. In the same year, Hong Kong, also without raw rattan of its own, imported more than US\$ 26 million worth of rattan and rattan products which, after conversion and manufacture, was worth US\$ 68 million in export value. By comparison, Indonesia's share of the trade, mainly of unprocessed canes, was only US\$ 15 million. The value-add from processing and manufacturing clearly were astonishing compared to the value of the raw materials.

During the 1980s, four South-East Asian countries with enormous raw rattan resources (Thailand, the Philippines, Indonesia and Malaysia) banned the export of rattan except as finished products. These bans have been imposed in order to stimulate the development of rattan-based industries and to protect wild resource. Indonesia, with 75-80% of the world's present production, has

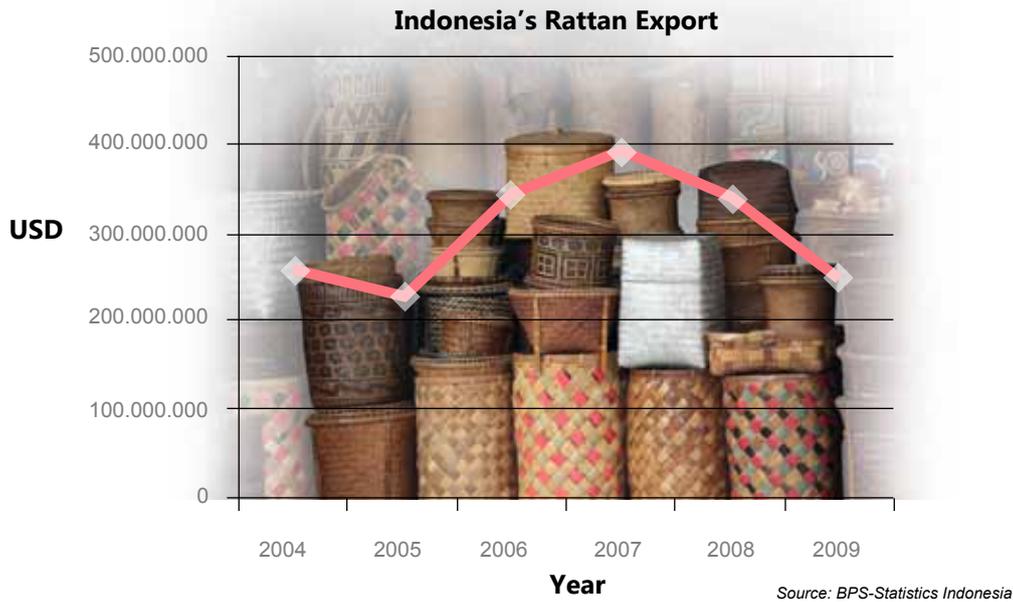


targeted export earnings of about US\$ 600 million, while Malaysia's target for export earnings from rattan furniture is about US\$ 60 million by 1995.

By the late 1980s, the book reported, external trade in rattan and rattan products has undergone great expansion, as follows: The increase in the value of exports from the main producer countries are striking: 250-fold over 17 years in Indonesia, 75-fold over 15 years in the Philippines, 23-fold over 9 years in Thailand, and 12-fold over 8 years in Malaysia. The combined value of exports for these four countries had risen to an annual figure of almost US\$ 400 million by the late 1980s, with Indonesia accounting for almost US\$200 million. The entire export of the Philippines and Thailand, and almost half of that of Malaysia, was of furniture. Net revenue derived from the sale of rattan goods by the two "middle-men" countries, Taiwan and Hong Kong, together totaled about US\$200 million in the late 1980s. Much of the partially processed and semi-finished rattan material exported to European countries was converted to high value-added products, mostly furniture.

Indonesia's Rattan Export

As mentioned earlier, the value of Indonesian rattan export has seen tremendous growth. In 1995, Cirebon and Surabaya, the main rattan industry regions in Java, contributed US\$293.5 million from rattan products export. The share of East Java in the country's export of finished rattan was 40.76% in 1995, while that of West Java was 24.46% in 1994. The total figure for the whole country has risen further to peak at nearly US\$ 400 million in 2007 before dropping to below US\$300 million in 2009.



The data for the above table of Indonesia's Rattan Export is a compilation of export data for the following HS Codes: 1401200000 (Rattans, used primarily for plaiting), 4601220000 (Mats, matting and screens of vegetable materials of rattan), 4601931000 (Plaits and similar products of plaiting material of rattan), 4601939000 (Other products of rattan), 4602120000 (Basketwork, wickerwork & other articles, of vegetable material of rattan), 9401510010 (Seats of rattan), 9401510090 (Other seats of rattan), 9401590000 (Other seats of bamboo/rattan), 9403810010 (Bedroom, dining room/living room sets of rattan), and 9403810090 (Other furniture of bamboo or rattan).



Export by Country of Destination

The following tables list the top 10 buying countries of Indonesian rattan seats and other furniture as defined by HS 940150100 (Seats of cane, osier, bamboo or similar materials: of rattan) and HS 940380100 (Furniture of cane, osier, bamboo or similar materials, excl. of metal, wood and plastics: Of rattan). All figures are in US\$ thousand. The rich countries in Europe, USA and Japan were the major importers.

HS 940150100

Seats of cane, osier, bamboo or similar materials: of rattan

(in US\$ thousand)

No.	Export Market	Exported value		
		2004	2005	2006
1	United States of America	24,358	26,980	30,991
2	Germany	26,405	26,885	23,872
3	Netherlands	0	16,324	13,474
4	Japan	18,663	15,788	13,288
5	United Kingdom	14,806	11,106	11,259
6	Italy	13,133	10,313	10,968
7	Belgium	9,393	8,100	9,769
8	Spain	9,730	8,599	9,410
9	France	7,944	7,801	7,041
10	Australia	6,830	5,170	4,485
	Other Countries	56,491	32,193	32,220
	World	187,753	169,259	166,777

Source: Trademap, 2010

HS 940380100

Furniture of cane, osier, bamboo or similar materials,
excl. of metal, wood and plastics : Of rattan

(in US\$ thousand)

No.	Export Market	Exported value		
		2004	2005	2006
1	United States of America	20,203	23,263	23,012
2	Japan	14,479	19,158	18,046
3	Germany	9,681	13,806	13,928
4	United Kingdom	10,828	19,107	13,719
5	Netherlands	-	4,905	7,578
6	Italy	6,652	8,021	7,478
7	France	5,211	6,119	7,188
8	Spain	4,332	5,209	6,912
9	Belgium	3,995	4,599	6,456
10	Singapore	1,049	1,686	2,545
	Other countries	32,029	38,763	33,370
	World	108,459	144,636	140,232

Source: Trademap, 2010

Export by Province of Origin

The following tables show export figures for various types of rattan products and the exporting provinces. All figures are in US\$ and for the period of 2004-2009.

HS 1401200000 Rattans, used primarily for plaiting

(in US\$ thousand)

PROVINCE	2004	2005	2006	2007	2008	2009
East Java	16,431	7,128	9,236	15,523	12,925	13,425
South Kalimantan	3,540	5,235	5,775	5,031	3,726	7,121
South Sulawesi	25	-	331	559	985	2,356
DKI Jakarta	391	134	420	1,639	7,229	2,157
North Sumatera	192	82	341	424	1,964	981
Other Provinces	1,550	2,292	2,683	933	1,120	862
TOTAL	22,128	14,871	18,786	24,108	27,948	26,902

Source: BPS-Statistics Indonesia

HS 4602120000 Basketwork, wickerwork & other articles, of vegetable material of rattan

(in US\$ thousand)

PROVINCE	2004	2005	2006	2007	2008	2009
DKI Jakarta	23,146	18,434	17,591	12,584	9,321	6,639
Central Java	2,972	2,737	1,019	9,843	2,479	3,797
East Java	4,090	2,530	2,553	3,407	2,699	2,327
Central Kalimantan	459	451	320	172	104	125
Lampung	209	35	205	123	230	72
Other Provinces	803	295	361	241	76	93
TOTAL	31,678	24,482	22,048	26,369	14,911	13,053

Source: BPS-Statistics Indonesia

HS 9401510010 Seats of rattan

(in US\$ thousand)

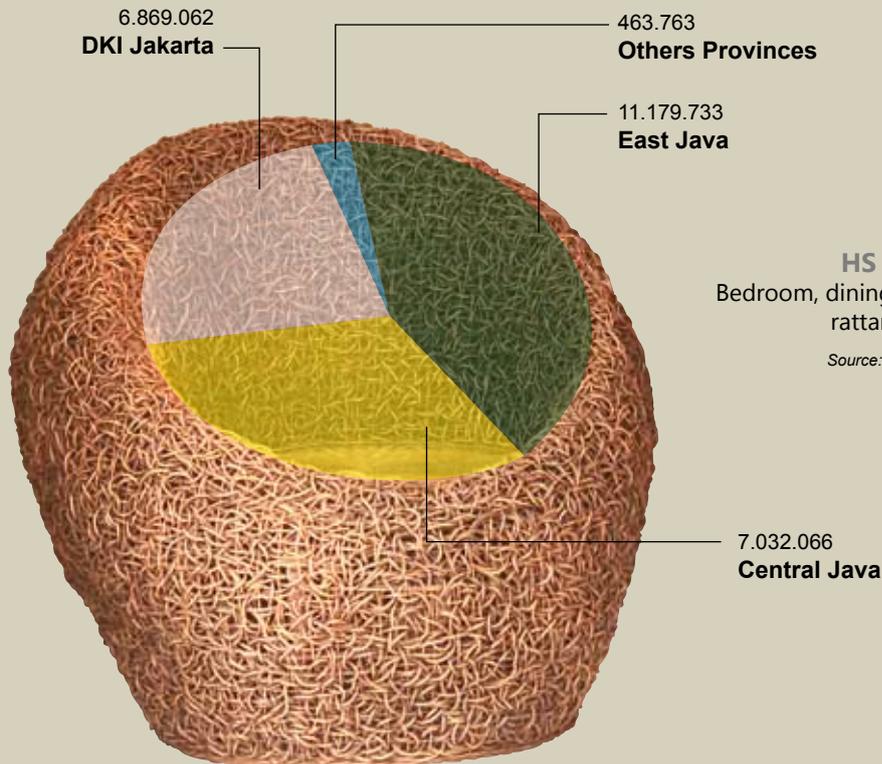
PROVINCE	2004	2005	2006	2007	2008	2009
DKI Jakarta	132,311	111,397	112,004	112,836	66,464	59,059
East Java	39,797	41,620	37,898	28,382	9,799	14,899
Central Java	9,300	11,927	12,581	11,033	4,818	4,205
North Sumatera	4,812	3,394	2,779	2,545	24,909	1,810
Bali	74,309	56	33	198	30	20
Other Provinces	1,459	865	1,482	169	50	8
TOTAL	187,753	169,259	166,777	155,162	106,070	79,999

Source: BPS-Statistics Indonesia

HS 9401510090
Other seats of rattan 2009 (in US\$)



Source: BPS-Statistics Indonesia



HS 9403810010
Bedroom, dining room/living room sets of rattan 2009 (in US\$)

Source: BPS-Statistics Indonesia

World Imports of Rattan Products

The following tables show the value of imports of various categories of rattan products in 2009 and their importers. Most of the rattan imports were in the form of furniture. The world's largest economies (US, Germany, Japan, China, France, UK) imported about half of all rattan exported.

Estimated World Imports of Various Rattan Products in 2009

		(In US\$ thousand)
HS code	Product label	Imported Value
140120	Rattans used primarily for plaiting	55,021
460122	Mats, matting and screens, of rattan plaiting materials, flat-woven or	8,505
460193	Plaits and similar products, of rattan plaiting materials, whether or not assembled into strips	4,069
460212	Basketwork, wickerwork and other articles, made directly to shape from rattan	143,125
940151	Seats of bamboo or rattan	203,425
940380	Furniture of oth materials, including cane,osier,bamboo/similar materials	37,800
TOTAL		451,945

Source: Trademap, 2010

Top 20 Import Markets for Various Rattan Products in 2009

		(In US\$ thousand)
Importers		Imported value in 2009
	World Imports	451,945
1	United States of America	69,595
2	Germany	63,396
3	Japan	32,877
4	China	25,935
5	France	22,873
6	Netherlands	22,085
7	United Kingdom	17,377
8	Belgium	12,852
9	Switzerland	11,095
10	Spain	10,510
11	Singapore	9,530
12	Russian Federation	9,295
13	Austria	8,623
14	Canada	8,061
15	Poland	7,972
16	Morocco	6,804
17	Italy	6,741
18	Venezuela	6,156
19	Australia	5,970
20	Sweden	5,456

Source: Trademap, 2010

Indonesian Rattan in US Market

USA is the world's largest buyer of rattan. Indonesia is its second largest supplier for rattan products.

USA Imports of Various Rattan Products

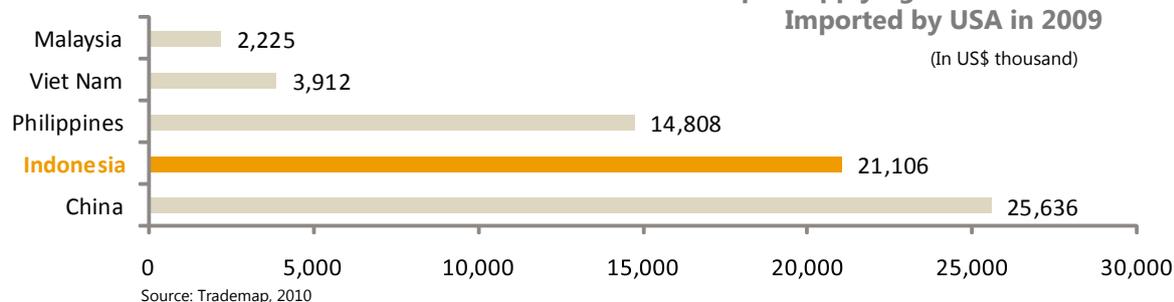
(In US\$ thousand)

HS Code	Product label	2005	2006	2007	2008	2009
940151	Seats of bamboo or rattan	-	-	73,527	54,627	34,492
460212	Basketwork, wickerwork and other articles, made directly to shape from	-	-	46,747	41,860	30,778
140120	Rattans used primarily for plaiting	2,746	2,768	3,524	3,108	2,836
460122	Mats, matting and screens, of rattan plaiting materials, flat-woven or	-	-	1,917	1,343	979
460193	Plaits and similar products, of rattan plaiting materials, whether or	-	-	727	506	510
940380	Furniture of other materials, including cane, osier, bamboo/similar materials	499,115	513,652	-	-	-
TOTAL		501,861	516,420	126,442	101,444	69,595

Source: Trademap, 2010

Top 5 Supplying Countries for Rattan Imported by USA in 2009

(In US\$ thousand)



Source: Trademap, 2010

Indonesian Rattan in China Market

Despite being an exporter of rattan products, China is also one of the world's largest importer. Most of those imports come from Indonesia, as shown below.

China Imports of Various Rattan Products

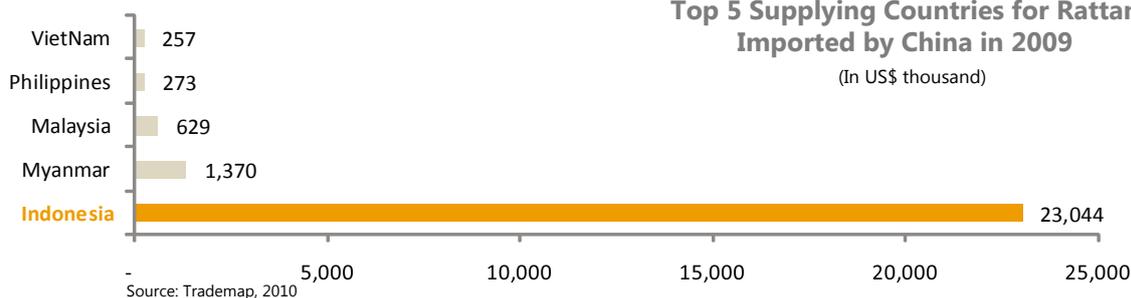
(In US\$ thousand)

HS Code	Product label	2005	2006	2007	2008	2009
140120	Rattans used primarily for plaiting	28,916	29,245	27,026	25,466	24,860
940151	Seats of bamboo or rattan	-	-	596	797	582
460212	Basketwork, wickerwork and other articles, made directly to shape from	-	-	308	363	422
460193	Plaits and similar products, of rattan plaiting materials, whether or	-	-	67	23	66
460122	Mats, matting and screens, of rattan plaiting materials, flat-woven or	-	-	1	-	5
940380	Furniture of oth materials, includg cane, osier, bamboo/similar materials	4,284	5,788	-	-	-
TOTAL		33,200	35,033	27,998	26,649	25,935

Source: Trademap, 2010

Top 5 Supplying Countries for Rattan Imported by China in 2009

(In US\$ thousand)



Source: Trademap, 2010

Indonesian Rattan in Japanese Market

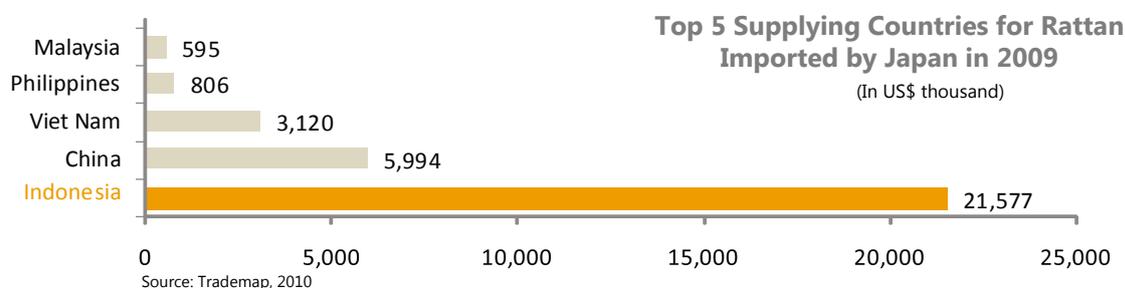
In Asia, Japan is the largest importer of rattan. Here, Indonesia is the leading supplier. The value is more than the other supplying countries combined.

Japan Imports of Various Rattan Products

(In US\$ thousand)

HS Code	Product label	2005	2006	2007	2008	2009
940151	Seats of bamboo or rattan	-	-	21,678	19,986	18,707
460212	Basketwork, wickerwork and other articles, made directly to shape from	-	-	22,542	17,959	11,285
460122	Mats, matting and screens, of rattan plaiting materials, flat-woven or	-	-	3,420	2,899	2,236
140120	Rattans used primarily for plaiting	826	677	733	572	585
460193	Plaits and similar products, of rattan plaiting materials, whether or	-	-	76	191	64
940380	Furniture of other materials, including cane, osier, bamboo/similar materials	53,287	54,851	-	-	-
TOTAL		53,287	54,851	50,456	43,615	34,886

Source: Trademap, 2010



Indonesian Rattan in German Market

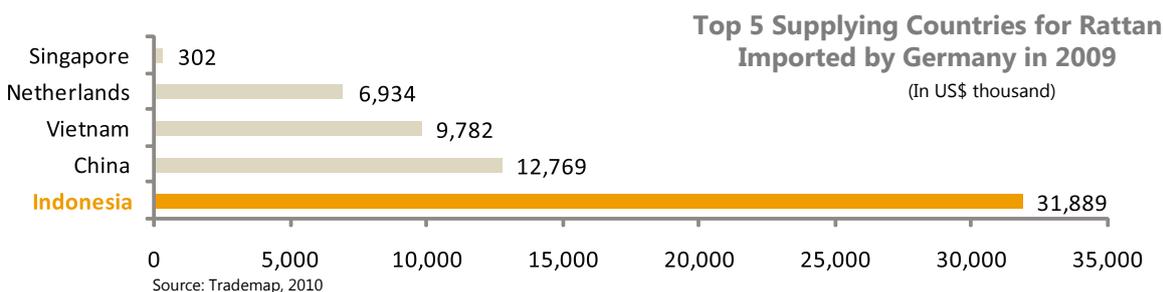
In Germany, the world's second largest export market for rattan, Indonesia supply half of the market, a value more than double that of the second largest supplier, China.

German Imports of Various Rattan Products

(In US\$ thousand)

HS Code	Product label	2005	2006	2007	2008	2009
940151	Seats of bamboo or rattan	-	-	54,183	40,188	31,059
460212	Basketwork, wickerwork and other articles, made directly to shape from	-	-	38,583	32,176	30,305
140120	Rattans used primarily for plaiting	1,259	1,202	1,395	1,372	1,362
460193	Plaits and similar products, of rattan plaiting materials, whether or	-	-	166	16	365
460122	Mats, matting and screens, of rattan plaiting materials, flat-woven or	-	-	137	141	305
940380	Furniture of other materials, including cane, osier, bamboo/similar materials	56,814	63,234	-	-	-
TOTAL		58,073	64,436	94,464	73,893	63,396

Source: Trademap, 2010





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Website : www.rattan-aj.com
Contact Person : Musba

Aida Rattan Industry

Block Duku Setu, Desa Bodesari, Plumbon, Cirebon, West Java
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Email : info@alamcalamus.com
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Website : www.anugrahjayarattan.com
Email : marketing@anugrahjayarattan.com,
export@anugrahjayarattan.com
Contact Person : H. Syahrani, Hj. Rini

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Jl. By Pass Nusa Dua No. 8 X Kelan, Kuta, Denpasar, Bali 80362
Tel : 62 361 703 073
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Website : www.indonesian-products.biz/ukm/balipasadenarattan
www.balipasadena.com
E-mail : balipasadenarattan@indonesian-products.biz,
Contact Person : Aang Nudy Santoso

Cantiq Rattan

Jl. Suryanegara No. 99, RT 06 / RW 02, Pamijahan, Plumbon, Cirebon,
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De'Bough

Jl. Tenggilis Mejoyo AJ-8, Surabaya, East Java
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Website : www.debough-furniture.com
Contact Person : Krisna Rudyadi Purnomo

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Kernel Indonesia Potential

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Blok Nambo, Desa Astapada, Tengah Tani, Cirebon, West Java
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