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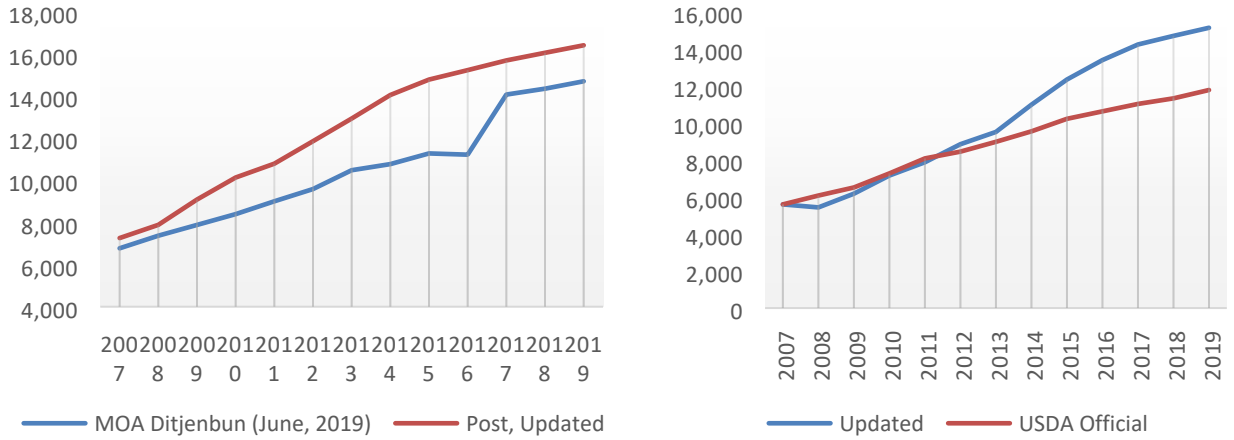
Report Highlights:

Palm oil production is expected to reach 43.5 million tons in 2020/21 as increased area is partially offset by lower yields resulting from fewer inputs and sub-optimal rainfall during 2018-2019. Palm oil exports and soybean imports for 2019/20 are revised downward due to expected weaker demand overseas and domestically as a result of the coronavirus pandemic.

Commodities
Oil, palm

Production
In January 2020, the Ministry of Agriculture (MOA) officially released updated oil palm plantation area data through the publication of MOA Decree 833/2019 (see Oilseeds January 2020 update). Based on updated data, planted area for Indonesia palm increased significantly from 14.67 million hectares (MOA Ditjenbun, June 2019) to 16.38 million hectares.

Figure 1: Indonesia Palm Planted Area Update (left) and Harvested Area (right), thousand ha



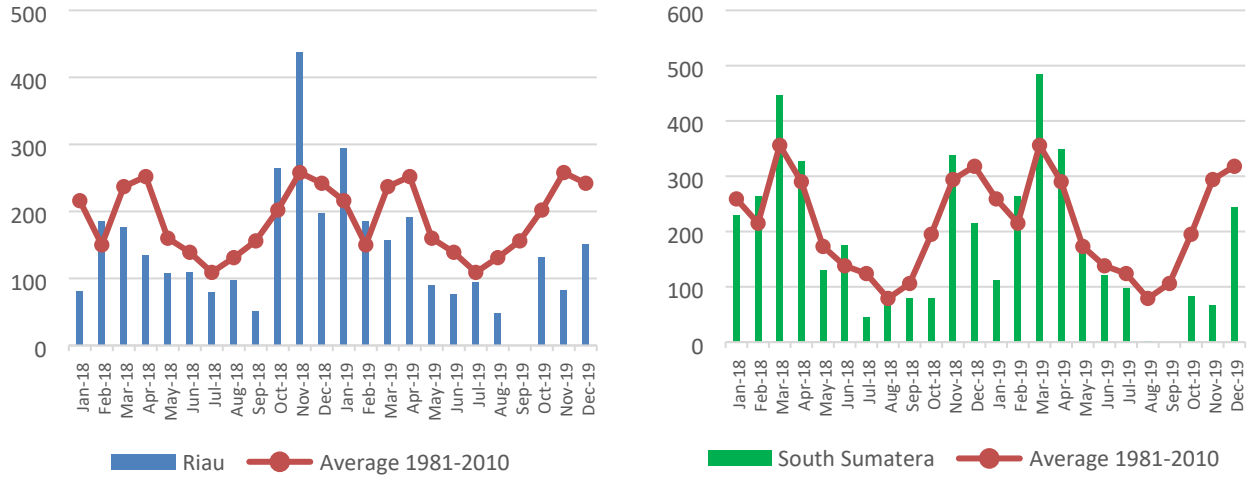
Source: Post calculation, MOA, Seed Producer's Association

Although the increased area suggests larger overall production, Post expects total production to increase by only one million tons over the previous marketing year due to lower yields resulting from decreased use of fertilizers and sub-optimal rainfall in key growing regions (Figure 2). Lower use of fertilizers and pesticides, a result of low prices for CPO through July 2019, has been reported among both large plantations and independent and plantation-supported smallholder farmers. Depressed CPO prices, which averaged $565 per ton from November 2018 through July 2019, often result in growers reducing inputs and minimizing area for re-planting (seed sales dropped from 88 million seeds in 2018 to 55 million seeds in 2019). Industry contacts indicate most growers resumed using appropriate levels of fertilizers and pesticides in late 2019, however yields are expected to require 1-2 years to recover from the lack of inputs

The increased planted area is expected to result in 43.5 million tons of oil production in 2020/21. In accordance with updated planted area, Post revises both harvested area and yield figures.

Immature Palm Trees in South Sumatera – Post Field Travel March 3, 2020

Figure 2: Rainfall in Riau and South Sumatera 2018-2019



Source: BMKG

Consumption

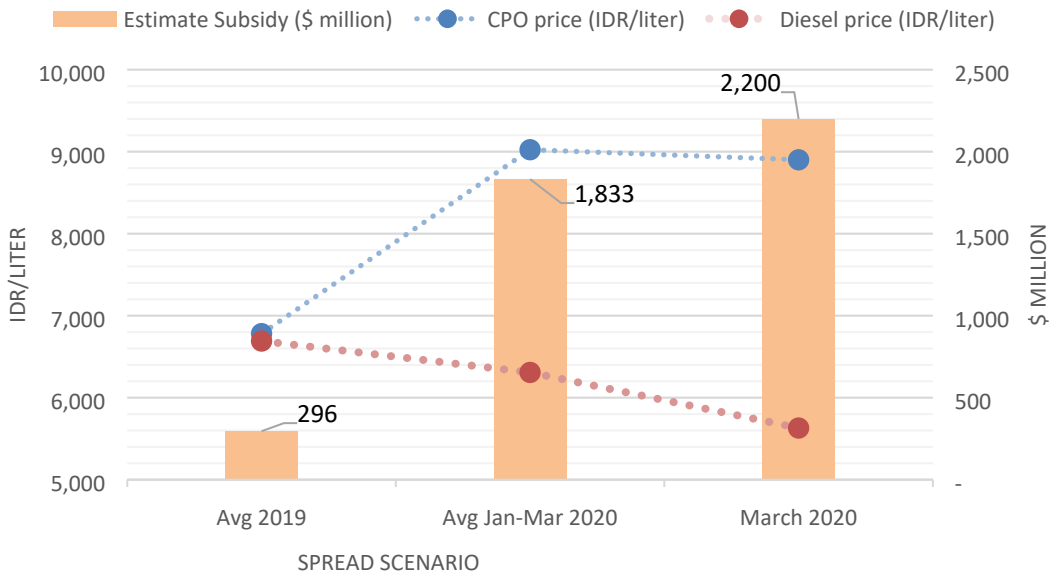
Palm oil consumption is forecast to grow slightly to 15.35 million tons in 2020/21 from 15.3 in 2019/20, based on stable industrial demand of biodiesel and a marginal increase in food sector consumption.

In January 2020, Indonesia officially mandated the use of 30 percent FAME (fatty acid methyl esters) in all diesel fuel nationwide. The B30 mandate, arriving just over a year after nationwide implementation of B20, has significantly increased Indonesia's domestic consumption of palm oil while achieving the overall goal of reducing imports of diesel fuel. As the biodiesel industry continues to expand and drive

palm oil consumption, the administration of the CPO fund (the program designed to cover price spreads between biodiesel and diesel and also support smallholder replanting) has taken on increased importance. Following the suspension of the CPO export levy in January 2019, coinciding with the official launch of B30 the Government of Indonesia re-instated the $50/ton fee on CPO exports in January 2020. The reinstatement of the levy has become imperative as the price spread has jumped significantly from an average of IDR 444 per liter ($ 0.03) in 2019 to nearly IDR 3300 per liter ($0.23) in March 2020.

Assuming current price spreads, annual exports of 27.5 million tons, and CPO prices maintained above the levy threshold of $619 per ton (further on levy scheme please see Oilseeds January 2019 update), the CPO fund and collected levy in 2020 can cover 99 percent of the B30 allocation. However, recent sharp declines in diesel prices and the resulting price spread increases suggest possible long-term challenges for the CPO subsidy scheme. Should large price spreads continue for an extended period of time (or had the diverging spreads not followed a period of relatively low levels of disbursements from the fund), then additional revenues or changes in subsidy structures would likely be required.

Figure 3: Estimate Subsidy Scenario and 2020 Available CPO Fund

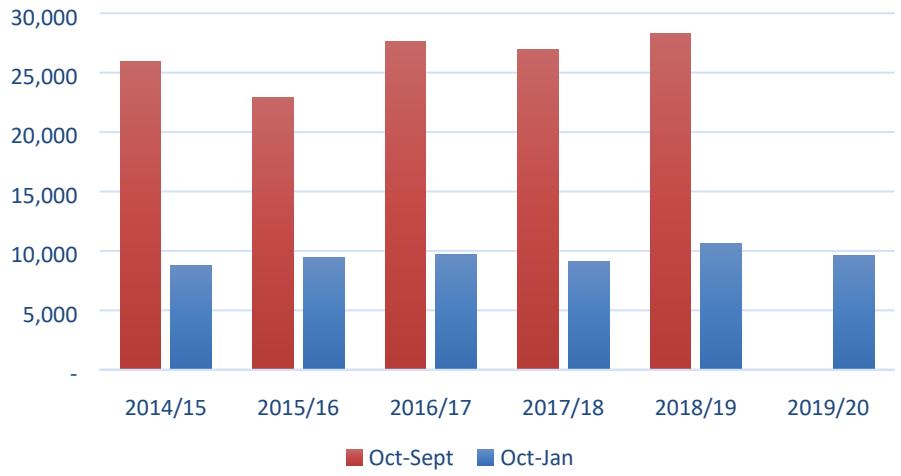


Trade

Post revises down 2019/20 exports to 27 million tons on lower demand due to coronavirus outbreaks, particularly in China and the EU. The slowing 2019/20 export performance is reflected in October 2019 to January 2020 trade data showing 8 percent declines compared to the corresponding period in 2018/19 (*note: January exports to China were in line with 2019 exports, thus this decline precedes any slowdown in exports that may result from coronavirus related economic disruptions*). Based on increased production and returning global demand stability, Post expects 2020/21 exports to rebound to 28.5 million tons.

India is expected to remain a major market for Indonesian palm oil, currently accounting for 17.4 percent (equal to 4.93 million tons) of exports. China, the second largest export market for Indonesian palm oil, accounted for 17.3 percent of exports in 2018/19.

Figure 4: Indonesia Palm Oil Exports, 2014-2020 (MT)



Source: TDM

Oil, Palm	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted						
Area Harvested	11,300	14,667	11,750	15,104		15,700
Trees	-	-	-	-		0
Beginning Stocks	3,079	3,079	2,579	2,663		2,863
Production	41,500	41,500	42,500	42,500		43,500
MY Imports	-	84	-	-		-
Total Supply	44,579	44,663	45,079	45,163		46,363
MY Exports	28,279	28,279	29,110	27,000		28,500
Industrial Dom. Cons.	7,656	7,656	8,000	9,200		9,200
Food Use Dom. Cons.	5,800	5,800	6,000	5,820		5,850
Feed Waste Dom. Cons.	265	265	270	280		300
Total Dom. Cons.	13,721	13,721	14,270	15,300		15,350
Ending Stocks	2,579	2,663	1,699	2,863		2,513
Total Distribution	44,579	44,663	45,079	45,163		46,363
	0	0	0	0	0	0
(1000 HA) ,(1000 TREES) ,(1000 MT)						

Commodities
Oilseed, palm kernel

Production
Palm Kernel (PK) production is estimated at 11.25 million tons in 2019/20 and 11.65 million tons in 2020/21 based on 6 percent volume of fresh fruit bunch (FFB) production.

Consumption
Local millers are expected to crush 11.14 million tons of PK in 2019/20 and 11.45 million tons in 2020/21, producing palm kernel oil (PKO) and palm kernel meal (PKM)

Trade
Palm kernel exports are forecast at 35,000 tons in both 2019/20 and 2020/21. Malaysia continues to be the primary destination of Indonesia PK exports.

Post has updated 2018/19 exports based on final trade data.

Oilseed, Palm Kernel	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted						
Area Harvested	11300	11300	11750	11750		11750
Trees	0	0	0	0		0
Beginning Stocks	34	34	29	17		12
Production	10900	10900	11250	11250		11650
MY Imports	0	0	0	0		0
Total Supply	10934	10934	11279	11267		11662
MY Exports	20	32	15	35		35
Crush	10810	10810	11140	11140		11450
Food Use Dom. Cons.	0	0	0	0		0
Feed Waste Dom. Cons.	75	75	80	80		80
Total Dom. Cons.	10885	10885	11220	11220		11530
Ending Stocks	29	17	44	12		97
Total Distribution	10934	10934	11279	11267		11662
	0	0	0	0		0
(1000 HA) ,(1000 TREES) ,(1000 MT)						

Commodities
Oil, palm kernel

Production
Post estimates PKO production to reach 4.87 million tons in 2019/20 and 5 million tons in 2020/21, based on 11.14 million tons and 11.45 million tons of PK to be crushed in 2019/20 and 2020/21, respectively.

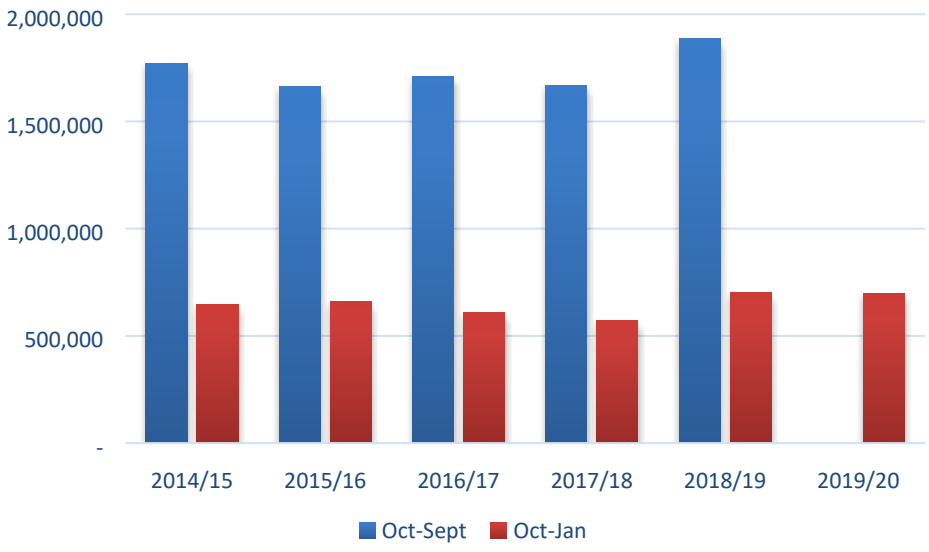
Consumption
Industrial use of PKO is expected to reach 2.55 million tons in 2019/20 and slightly increase to 2.6 million tons in 2020/21. Oleo-chemical industries are the main consumers of PKO, producing a variety of products such as soaps, pharmaceuticals and industrial lubricants.

In the food sector, PKO has been widely used as a replacement for coconut oil and in the production of chocolate confectionery as a substitute for cocoa butter because of its price advantages and similar properties. Total PKO consumption is projected to increase by 75,000 tons to 3.1 million tons in 2020/21.

Trade
Post expects 2019/2020 PKO exports to decrease slightly to 1.85 million tons, based on October 2019-January 2020 shipment pace showing 1 percent lower volumes compared to previous year. PKO exports are forecast to reach 1.9 million tons in 2020/21. Major PKO export destinations include China, U.S., Malaysia and EU.

Post revises 2018/19 trade figures to 1.887 million tons to reflect final trade data.

Figure 5. Indonesia Palm Kernel Oil Exports, 2014-2020 (MT)



Source: TDM

Oil, Palm Kernel	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	10810	10810	11140	11140		11450
Extr. Rate, 999.9999	0.44	0.44	0.44	0.44		0.44
Beginning Stocks	370	370	364	257		252
Production	4724	4724	4870	4870		5000
MY Imports	0	0	0	0		0
Total Supply	5094	5094	5234	5127		5252
MY Exports	1780	1887	1840	1850		1900
Industrial Dom. Cons.	2500	2500	2600	2550		2600
Food Use Dom. Cons.	450	450	475	475		500
Feed Waste Dom. Cons.	0	0	0	0		0
Total Dom. Cons.	2950	2950	3075	3025		3100
Ending Stocks	364	257	319	252		252
Total Distribution	5094	5094	5234	5127		5252
	0	0	0	0		0
(1000 MT) ,(PERCENT)						

Commodities

Meal, palm kernel

Production

PKM production is estimated to reach 6.020 million tons in 2020/21, based on 11.45 million tons of PK crushed.

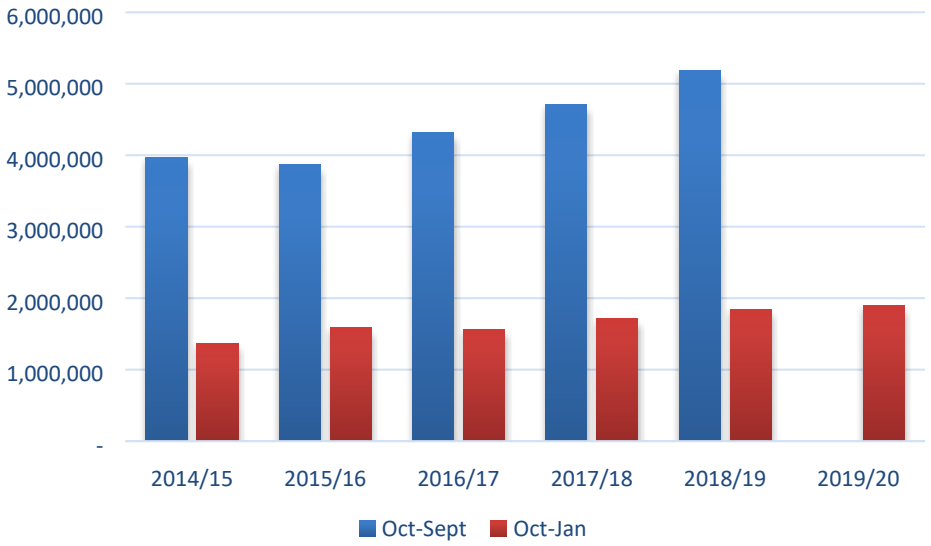
Consumption

Post expects feed sector to consume 650,000 tons of PKM in 2020/21, a 25,000 ton increase from 2019/20. PKM for domestic consumption is limited to ruminant feed.

Trade

PKM exports are forecast to increase by 50,000 tons to 5.3 million tons in 2020/21. In 2019, about 72 percent of exported PKM were shipped to Netherlands, New Zealand, South Korea and China.

Figure 6. Indonesia Palm Kernel Meal Exports, 2014-2020 (MT)



Source: TDM

Meal, Palm Kernel	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	10810	10810	11140	11140		11450
Extr. Rate, 999.9999	0.53	0.53	0.53	0.53		0.53
Beginning Stocks	338	338	234	234		219
Production	5686	5686	5860	5860		6020
MY Imports	0	0	0	0		0
Total Supply	6024	6024	6094	6094		6239
MY Exports	5190	5190	4980	5250		5300
Industrial Dom. Cons.	0	0	0	0		0
Food Use Dom. Cons.	0	0	0	0		0
Feed Waste Dom. Cons.	600	600	750	625		650
Total Dom. Cons.	600	600	750	625		650
Ending Stocks	234	234	364	219		289
Total Distribution	6024	6024	6094	6094		6239
	0	0	0	0		0
(1000 MT) ,(PERCENT)						

Commodities
Oilseeds, soybean

Production
Post revises down 2019/20 soybean production to 480,000 tons due growers to postponing plantings due to a delayed start of the rainy season in late 2019.

Soybean production in 2020/21 is forecast at 475,000 tons as land conversions to non-agriculture use are expected to continue in key growing areas of Central and East Java. Most growers continue to prefer planting more lucrative crops such a corn and paddy and typically plant soybeans as part of a crop rotation to improve soil quality as one part of a three-season planting cycle. As a secondary crop for most growers, soybeans are often grown with minimal inputs, resulting in low yields of less than 1.3 tons per hectare.

Consumption
In line with population growth, soybean consumption is expected to increase by 50,000 tons annually, reaching 2.95 million tons in 2020/21. Post revises down 2019/20 consumption to 2.9 million tons on lower demand as a result of the coronavirus outbreak.

The majority of soybeans grown and imported are consumed in the food sector. Soybeans comprise the main ingredient for both tempeh and tofu, staple foods in the Indonesian diet. Nearly all tempeh and tofu are produced by small, local producers, often based around "backyard" cottage industries. In addition to these food centers, soybeans are also used by numerous small businesses to produce local varieties soy sauce. The soy sauce industry typically uses one ton of soybeans to produce 1,200 liters of soy sauce, which requires other ingredients such palm sugar and salt. Many traditional soy sauce producers prefer to use black soybeans for both its natural color and the higher return value for the leftover beans following production.

Although Indonesia's soybean consumption tends to grow along with population, this trend will likely be disrupted as a result of the coronavirus outbreak as demand at restaurants and other informal eateries is expected to decline.

Indonesia's feed sector continues to utilize soybean for full-fat soy (FFS) production. The use of FFS tends to increase during periods when local corn is in short supply. Post expects FFS production capacity to continue expanding among large integrated millers, reaching 180,000 tons of in 2020/21.

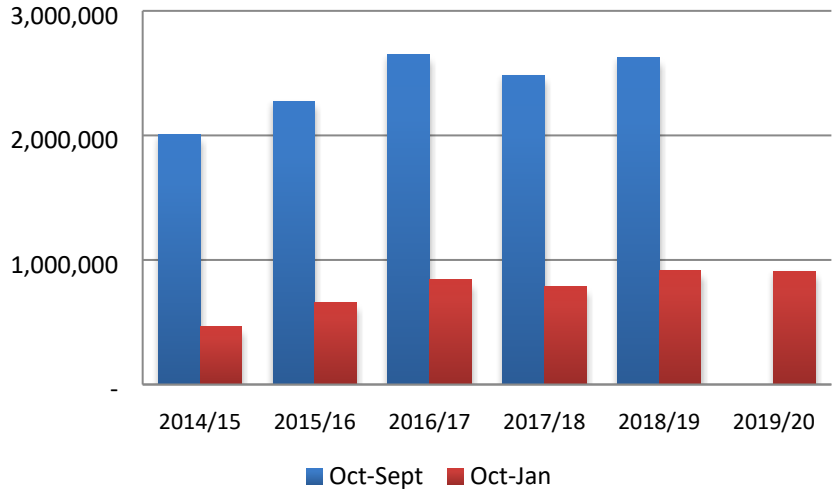
Trade
Post expects soybean imports to reach 2.8 million tons in 2020/21 on continued demand from both human use and feed sector. Post lowers 2019/20 imports to 2.5 million tons on expected weaker demand due to the coronavirus outbreak.

Congestion at US ports have impacted containerized shipments of soybeans to Indonesia, in some cases delaying transit time to more than 45 days. The delays have impacted many small and medium size

importers who rely on container freight to meet their smaller distribution channels. More than half of US soybeans shipped to Indonesia were non-bulk.

US soybeans continue to account for the vast majority of Indonesia soybean imports (97 percent) followed by Canada (2 percent).

Figure 7. Indonesia Soybean Imports 2013-2020 (MT)



Source: TDM

Oilseed, Soybean	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	450	450	450	440		435
Area Harvested	420	420	400	400		390
Beginning Stocks	247	247	305	225		133
Production	520	520	510	480		475
MY Imports	2,725	2,622	2,950	2,500		2,800
Total Supply	3,492	3,389	3,765	3,205		3,408
MY Exports	2	4	2	2		2
Crush	0	0	0	0		0
Food Use Dom. Cons.	3,025	3,000	3,100	2,900		2,950
Feed Waste Dom. Cons.	160	160	175	170		180
Total Dom. Cons.	3,185	3,160	3,275	3,070		3,130
Ending Stocks	305	225	488	133		276
Total Distribution	3,492	3,389	3,765	3,205		3,408
	0	0	0	0	0	0
(1000 HA) ,(1000 MT)						

Commodities
Meal, soy

Production
Indonesia does not produce soybean meal.

Consumption
Soybean meal continues to occupy a major share of feed rations for Indonesia's large poultry industry. Following a decline in consumption during 2019 as poultry growers cut back on production to boost prices, overall soybean meal consumption is expected to grow to 4.75 million tons in 2020/21, an increase from 4.7 million ton of 2019/20. Indonesia's feed industry, particularly the broiler feed sector, continues to expand to meet increased demand for processed meat products. Indonesia per capita poultry meat consumption is only 7.6 kg, considered low in the region.

Trade
Soybean meal imports are expected to increase by 100,000 tons from 4.75 million tons in 2019/20 to 4.85 million tons in 2020/21. Argentina and Brazil continue to dominate the market, accounting for more than 95 percent of soybean meal imports. Although opportunities for U.S. soybean meal do occasionally emerge, such as in 2018 when South American supply constraints forced buyers to seek alternate supplies, the market remains price driven, often limiting U.S. exports.

Meal, Soybean	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	0	0	0	0		0
Extr. Rate, 999.9999	0	0	0	0		0
Beginning Stocks	300	300	250	124		174
Production	0	0		0		0
MY Imports	4575	4449	4750	4750		4850
Total Supply	4875	4749	5000	4874		5024
MY Exports	0	0		0		0
Industrial Dom. Cons.	0	0		0		0
Food Use Dom. Cons.	0	0		0		0
Feed Waste Dom. Cons.	4625	4625	4750	4700		4750
Total Dom. Cons.	4625	4625	4750	4700		4750
Ending Stocks	250	124	250	174		274
Total Distribution	4875	4749	5000	4874		5024
	0	0	0	0	0	0
(1000 MT) ,(PERCENT)						

Commodities
Oilseed, copra

Production
Copra production is expected to remain stable at 1.66 million tons in both 2019/20 and 2020/21. Growers and processors report favorable weather conditions leading to improving yields in 2019/20, helping to offset declining coconut plantation area. The majority of Indonesia's coconut farms are smallholder owned with limited maintenance and inputs.

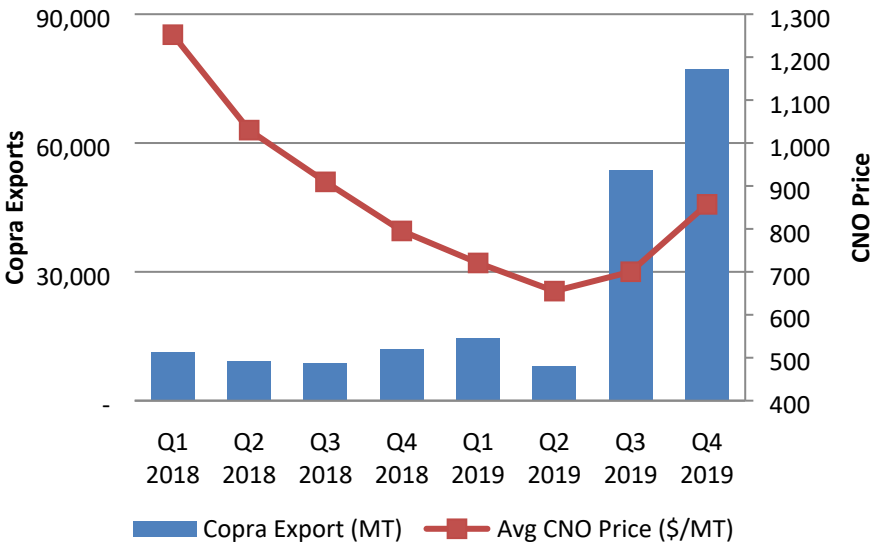
Consumption
Coconut oil (CNO) industry is the main consumers of copra. In 2020/21 the industry is expected to crush 1.55 million tons of copra, a slight decrease of 10,000 tons from previous year.

Post revises down 2018/19 crushing copra to 1.54 million tons due to diversion from local-use to export markets.

Trade
As a result of rebounding CNO prices in late 2019, copra exports are forecast lower at 50,000 tons in 2020/21, a decline from 2019/20 of estimated 90,000 tons. As CNO prices dropped below $1,000 per ton Q2 2018, copra collectors began seeking higher prices overseas, eventually finding buyers in Bangladesh and the Philippines.

The 2018/19 exports are updated to 89,000 MT based on final trade data.

Figure 8. Copra Exports and CNO Price



Source: TDM, WB

Oilseed, Copra	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0		0
Area Harvested	3480	3480	3475	3475		3475
Trees	0	0	0	0		0
Beginning Stocks	4	4	9	10		15
Production	1640	1640	1600	1660		1660
MY Imports	0	0	0	0		0
Total Supply	1644	1644	1609	1670		1675
MY Exports	40	89	45	90		50
Crush	1590	1540	1550	1560		1550
Food Use Dom. Cons.	0	0	0	0		0
Feed Waste Dom. Cons.	5	5	5	5		5
Total Dom. Cons.	1595	1545	1555	1565		1555
Ending Stocks	9	10	9	15		70
Total Distribution	1644	1644	1609	1670		1675
	0	0	0	0		0
(1000 HA) ,(1000 TREES) ,(1000 MT)						

Commodities

Oil, coconut

Production

CNO production is expected to reach 980,000 tons in 2020/21, based on 1.55 million tons of crushed copra.

The majority of Indonesian CNO producers operate nearby coconut plantations, with production capacities ranging from 30 to 16,000 tons per month. In Sulawesi, large CNO producers source copra not only from surrounding areas but also from other provinces or neighboring islands, such Maluku. While many CNO producers in Sulawesi and Sumatera sell CNO for exports markets, some CNO producers in Java focus exclusively on the island's domestic demand.

Table 1. Coconut Planting Area and CNO Exports by Origin

	Coconut Planting Areas (thousand ha)		CNO exports by origin ports 2019 (MT)	
Sumatera	1,120	32%	161,499	26%
Sulawesi	766	22%	326,512	53%
Java	793	23%	122,463	20%
other	828	24%	338	0%
	3,507		610,812	

Source: MOA, BPS

Consumption

Industry sectors, mainly oleo-chemical, are estimated to utilize 250,000 tons CNO both in 2019/20 and 2020/21. Along with food sector, CNO consumption is expected to reach 372,000 tons in 2020/21.

Trade

CNO exports are forecast to reach 650,000 tons both in 2019/20 and 2020/21. In 2019, nearly 58 percent of CNO were shipped to China, Malaysia and U.S where they are primarily used in the food processing sector.

Oil, Coconut	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	1590	1540	1550	1560		1550
Extr. Rate, 999.9999	0.632	0.627	0.632	0.633		0.632
Beginning Stocks	220	220	269	229		219
Production	1005	965	980	987		980
MY Imports	31	31	15	25		20
Total Supply	1256	1216	1264	1241		1219
MY Exports	617	617	650	650		650
Industrial Dom. Cons.	250	250	250	250		250
Food Use Dom. Cons.	120	120	122	122		122
Feed Waste Dom. Cons.	0	0	0	0		0
Total Dom. Cons.	370	370	372	372		372
Ending Stocks	269	229	242	219		197
Total Distribution	1256	1216	1264	1241		1219
	0	0	0	0		0
(1000 MT) ,(PERCENT)						

Commodities

Meal, Copra

Production

Copra Meal (CM) is the byproduct of coconut oil extraction. Based on an expected 1.56 million tons of copra processed in 2019/20 and 1.55 million tons in 2020/21, copra meal (CM) production will reach 528,000 tons in 2019/20 and 524,000 tons in 2020/21.

Consumption

CM is mainly used as a feed ingredient suitable for ruminants but can also be used in smaller amounts for other livestock. CM contains 20-30 percent protein, and may partially replace soybean meal. Post expects stable CM use at 250,000 tons both in 2019/20 and 2020/21.

Trade

CM exports are expected to reach 260,000 tons in 2020/21, in line with 2019/20 performance. The primary destinations for CM were India and South Korea. In South Korea, the feed industry uses CM to produce feed compound for swine. Indian feed miller use is considered as marginal, and primarily used for poultry feed.

Meal, Copra	2018/2019		2019/2020		2020/2021	
Market Begin Year	Oct-18		Oct-19		Oct-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush	1590	1540	1550	1560		1550
Extr. Rate, 999.9999	0.329	0.338	0.329	0.338		0.338
Beginning Stocks	5	5	9	6		25
Production	523	520	510	528		524
MY Imports	1	1	1	1		1
Total Supply	529	526	520	535		550
MY Exports	270	270	265	260		260
Industrial Dom. Cons.	0	0	0	0		0
Food Use Dom. Cons.	0	0	0	0		0
Feed Waste Dom. Cons.	250	250	250	250		250
Total Dom. Cons.	250	250	250	250		250
Ending Stocks	9	6	5	25		40
Total Distribution	529	526	520	535		550
	0	0	0	0		0
(1000 MT) ,(PERCENT)						

Commodities

Oilseed, peanut

Production

Indonesian peanut production is expected to decrease by 20,000 tons to 970,000 tons in 2020/21, based on declining area. Most growers plant peanut as secondary crops in a rotation cycle for the purpose of improving soil quality for main commercial crops.

Consumption

The Indonesian peanut market generally consists of traditional market, snack food and confectionery. Traditional market holds about 70 percent while snack food about 20 percent.

Post revises peanut consumption for 2019/20 downward to 1.32 million tons based on lower household consumption and weaker demand in traditional markets. Consumption is expected to remain at 1.32 million tons in 2020/21.

Trade

Peanut imports are expected to increase slightly to 450,000 tons in 2020/21, from 444,000 tons in 2019/20.

2018/19 import are revised to reflect final trade data.

Oilseed, Peanut	2018/2019		2019/2020		2020/2021	
Market Begin Year	Jan-18		Jan-19		Jan-20	
Indonesia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	570	570	550	550		545
Beginning Stocks	179	179	137	144		127
Production	1025	1025	990	990		970
MY Imports	400	436	450	444		450
MY Imp. from U.S.	0	0	0	0		0
MY Imp. from EU	0	0	0	0		0
Total Supply	1604	1640	1577	1578		1547
MY Exports	7	7	7	6		5
MY Exp. to EU	0	0	0	0		0
Crush	50	50	50	50		50
Food Use Dom. Cons.	1325	1325	1325	1320		1320
Feed Waste Dom. Cons.	85	114	90	75		75
Total Dom. Cons.	1460	1489	1465	1445		1445
Ending Stocks	137	144	105	127		97
Total Distribution	1604	1640	1577	1578		1547
	0	0	0	0		0
(1000 HA) ,(1000 MT)						

Attachments:

No Attachments