

## **Understanding the Prospects for Indonesia's SMEs in Apparel Sector to the European Market Through Indonesia-European Union Comprehensive Economic Partnership Agreement (IEU CEPA)**

**Syifa Aprilia Putri\*, Yosua Saut Marulitua Gultom, Kentzico Rabil Aldrich,  
Ian Syadewa, Finsy Aurelia Putri Kinanti**

Universitas Pembangunan Nasional Veteran Jakarta

*\*Corresponding Author, Email: aprrlsyifa@gmail.com*

### **ABSTRACT**

Apparel products are an economic subsector that can contribute significantly to Indonesia's foreign trade value. This is in line with the high demand in the global market, especially in the European Union region. However, as one of the countries producing apparel products, Indonesia must also compete with other apparel-producing countries to enter the European Union market. Therefore, this paper examines the prospects of apparel products from SMEs in Indonesia for the European Union market by analyzing domestic and foreign conditions and existing support. Using a descriptive qualitative method, this paper is compiled based on data obtained from document studies. This paper discusses the significance of apparel SMEs in Indonesia and the situation of the apparel market in Europe. The author argues that the existence of the IEU CEPA will encourage the expansion of the apparel product market produced by SMEs in Indonesia to the European Union market. This paper also tries to highlight the role of the diaspora and the Indonesian government in encouraging export-oriented apparel SMEs. This paper is expected to be useful in supporting the progress of apparel SMEs in Indonesia to expand into the European Union market.

**Keywords:** Indonesia, European Union, Apparel, IEU CEPA

### **INTRODUCTION**

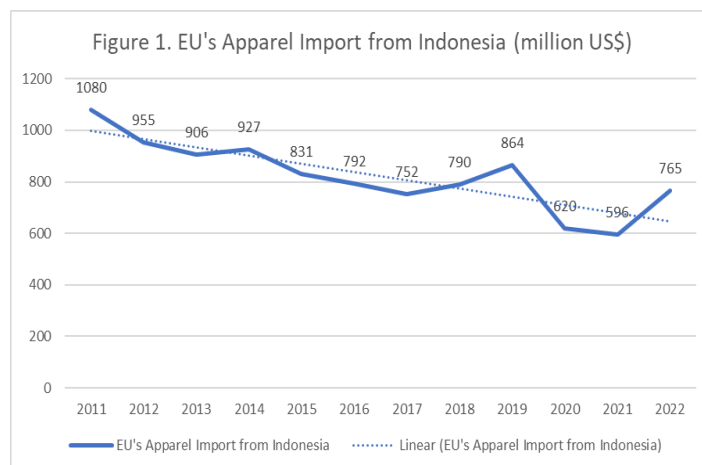
The Apparel market includes clothing that is produced for private end customers and is broken down into the following product lines: Women's Apparel, Men's Apparel, and Children's Apparel. Work clothes as well as other personal accessories, such as watches and jewelry, handbags, and similar items, that do not count as actual articles of clothing are not included. Indonesia itself is among the world's top ten apparel producers. Its industry plays a crucial role in the national economy by providing employment to nearly 3 million people, or 2% of total employment in 2022 (BPS, 2022). A significant portion of the country's apparel production, valued at \$12 billion, caters to international markets (Jakarta Globe, 2022). The United States remains the largest importer of Indonesian products with export value around \$5 billion (Statista, 2023), followed by the European Union at \$765 million (Trading Economics, 2024).

As global apparel companies shift production away from China, Indonesia has emerged as an attractive alternative. China's dominance as a global cotton importer is waning,

with many cotton exports being redirected to competing nations, including Indonesia. According to the USDA, China’s cotton imports are projected to rise by just 3.5 million bales from 2021 to 2030, compared to an estimated 8.1 million bales for major competing countries like Indonesia, Vietnam, Pakistan, Bangladesh, and Turkey combined. By 2030, China is expected to account for 24% of global cotton imports, while these competing nations will collectively account for 47%. From 2018 to 2022, Indonesia’s apparel export value experienced fluctuations, first decreasing and then rebounding, with a compound annual growth rate (CAGR) of 4.16%. The industry saw a sharp decline in 2020 due to the impact of the COVID-19 pandemic, with export values dropping by 17.19% to \$5.857 billion. However, as the Indonesian government eased restrictions in 2021, the sector recovered swiftly, with export values reaching \$6.909 billion in 2021 and \$7.992 billion in 2022, marking year-on-year growth of 17.98% and 15.6%, respectively (Globe News Wire, 2024).

According to Statista (2024), Indonesia’s apparel market is projected to generate \$22.66 billion in revenue, with an annual growth rate of 3.31%. The largest segment is women’s apparel, contributing \$10.70 billion. Regarding that, Indonesia’s per capita revenue in the apparel market is estimated at \$80.98 for 2024. The market volume is expected to reach 2 billion units by 2028, though a slight decrease of -1.3% in growth is anticipated for 2025. On average, each individual will contribute 7.5 units to the apparel market in 2024. Furthermore, a significant portion of sales—98%—will come from the non-luxury apparel segment by 2024. This demonstrates the dominance of affordable clothing in Indonesia’s market. Despite moderate growth, Indonesia remains a key player in the global apparel industry, especially in the non-luxury segment, as consumer demand continues to shift toward more accessible options.

The EU market is a traditional markets for apparel export other than Japan, Canada, USA and Uni-Emirate Arab (UEA). However, while the volume of Indonesia's mens-apparel exports was fluctuating, its share in EU countries tended to decline. The decline in the export of mens-apparel has become a phenomenon that needs to be considered to survive in the traditional markets.



According to Figure 1. above, the decline can be clearly seen where decade ago, Indonesia’s export to the European Union countries was valued above \$1 billion, while in 2022 it declined around 30%, only to \$765 million. Knowing this, Indonesia has tried some efforts, one of them is by pursuing economic partnership with European countries, resulting in IEU-CEPA (Indonesia-European Union Comprehensive Economic Partnership). Currently, IEU-CEPA has finished its 19th round discussion (Rachmawati, 2024). The negotiations so far has included various sectors, including apparel and trade access for both parties. While the negotiations are quite tough, the progress is visible, with Indonesian minister of trade says its 90% completed (Cabinet Secretariat, 2024).

The presence of IEU CEPA is positively welcomed to boost Indonesia's export market to the European Union which has been experiencing a decline in the last ten years, especially in the apparel sector. Based on this background, the authors then formulate the question “how can IEU-CEPA encourage an increase in Indonesia's apparel exports?”

## METHODS

This article is written using a qualitative descriptive approach. This approach focuses on efforts to provide in-depth descriptions and depictions of existing phenomena, emphasizing the characteristics, quality, and interrelationships between aspects (Sukmadinata, 2011). This study explores the potential and prospects of SMEs in the apparel sector in Indonesia to expand into the European Union market, by utilizing facilitation through the IEU-CEPA as the phenomenon being studied. The data used in this study are sourced from literature studies in the form of articles, news, and credible official websites, which are then analyzed qualitatively to obtain a comprehensive understanding of the research subject.

## RESULT AND DISCUSSION

### 1. Portrait of Apparel SMEs in Indonesia

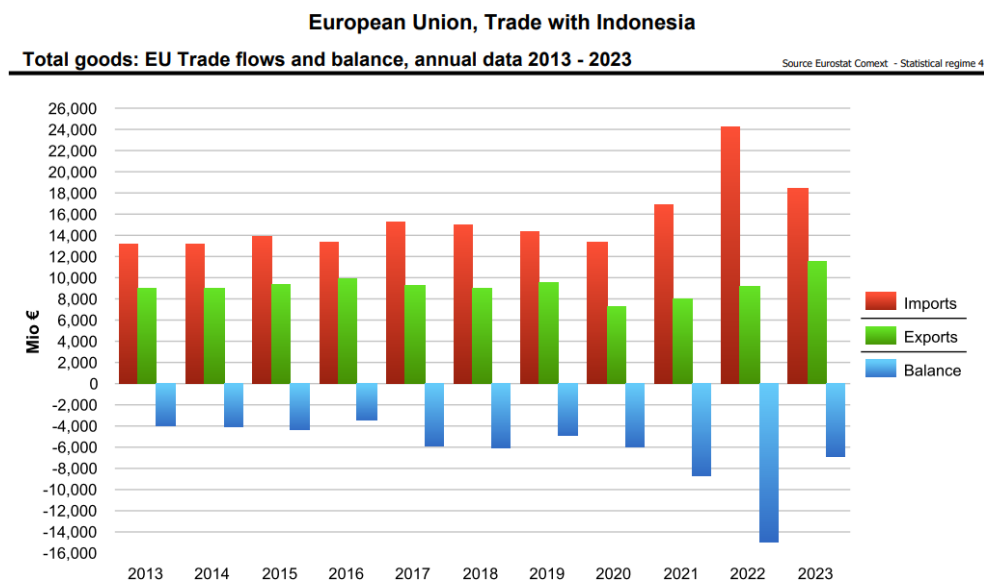
SMEs in Indonesia's textile sector play a significant role in supporting the national economy. According to data from the Ministry of Cooperatives and Small and Medium Enterprises, this sector accounts for more than 90% of all businesses in Indonesia, absorbing up to 97% of the workforce and contributing around 60% to the GDP. The textile sector, particularly apparels like batik and woven fabrics, is one of the flagship products produced by SMEs and holds both economic and cultural value. These SMEs are spread across various regions, such as West Java, Central Java, Yogyakarta, and Bali, known as centers for traditional apparels production. These businesses typically employ manual and semi-mechanical production methods, making them reliant on technological support to compete in broader markets. The potential of Indonesia's apparels SMEs in both local and international markets is significant, especially with the growing demand for sustainable and high-quality products from global consumers.

An excellent illustration of how SMEs function in Indonesia's textile industry, especially apparels may be found at Cipadu Market in Tangerang, a significant apparels textile hub. Apparel SMEs in Cipadu confront many obstacles despite being a well-known shopping destination, particularly for raw textiles and ready-made clothing. According to a research, just 66.7% of business owners use their own funds for operations, which suggests that they have little recourse to outside funding.

Furthermore, the market's overall expansion is hampered by inadequate infrastructure, such as inadequate parking facilities and clogged roads, even though average daily profits might approach IDR 5 million. The apparels textile industry in Cipadu is nevertheless thriving in spite of these problems, drawing clients from nearby nations like Brunei and Malaysia.

## 2. IEU CEPA in Support of Indonesia’s Apparel Products in European Union

Indonesia's relations with the European Union in economics and trade have developed rapidly since a decade ago after the implementation of the Political and Cooperation Agreement (PCA) which accommodates the bilateral partnership between Indonesia and the EU outside ASEAN. By 2023, the total value of trade in goods and services between Indonesia and the European Union reached €29.7 billion and €9.3 billion, making the European Union the fifth largest trading partner for Indonesia. In the past five years, the volume of trade between Indonesia and the European Union has continued to experience significant growth amid the global crisis.



**Source: European Commission, 2024**

The graph above shows that over the past five years (2018-2023), trade between the two countries has experienced up and down dynamics. When the Russia-Ukraine war broke out, imports from Indonesia to the European Union tended to increase, with a

large spike in 2022 and remained high in 2023 in line with exports from the European Union to Indonesia also seen a significant increase. To improve trade performance more optimally, a cooperation agreement between Indonesia and the European Union in the Indonesia-European Union Comprehensive Partnership Agreement (IEU-CEPA) is needed to remove trade barriers. Trade liberalization does not only focus on reducing tariffs in general, but also brings about changes in trade policies that vary between industries (Goldberg & Pavcnik, 2016).

The European Union is a promising market for exporting various commodities considering that the European Union region is home to 448.4 million people from 27 countries integrated in a single market and is responsible for 14% of total world trade. In addition, the implementation of the Indonesia-EU Comprehensive Economic Partnership Agreement (IEU-CEPA) opens up great potential for the expansion of trade in various commodities from Indonesia. The potential for increasing trade between Indonesia and the European Union can be seen from the high level of complementarity and from the 500 main products exported by Indonesia to the world, around 74% of which are products that are also the main import needs of the European Union (Demuri et. al, 2021).

The apparel market in the European Union is also one of the sectors with great potential for Indonesian exports, especially if supported by the IEU-CEPA. As much as 34.1% of the total value of textile and apparel imports in the world is held by the European Union with half of these imports coming from the production of developing countries such as China, Bangladesh, Turkey, India and Vietnam which are the main suppliers of apparel to the European Union. Although apparel included in textile and clothing products (TPT) is the sector with the largest exports for Indonesia, apparel has not been able to enter the European Union market optimally. The European Union countries that are the main destinations for apparel product exports are Germany, France, Spain, the Netherlands and Italy, but of the top ten Indonesian exports only Germany is included.

The existence of IEU-CEPA can encourage the expansion of the apparel product market from Indonesia to the European Union by eliminating trade barriers. The absence of a trade and economic cooperation agreement hinders market access due to the lack of regulatory alignment between countries. Especially for SMEs that do not yet have the capability to meet or balance the regulatory standards set by other countries for product exports. The cooperation agreement established by Indonesia and the European Union through IEU-CEPA will facilitate the equalization of these regulations. Optimizing regulations that reduce regulatory diversity will bring benefits from an integrated market (Rodrik, 2018).

IEU-CEPA is also an instrument to secure the sustainability of Indonesia's apparel export activities to the European Union. Because currently, Indonesia is categorized as a country in the Generalized System of Preference (GSP) which enjoys low trade tariffs for products exported to the European Union. The problem is, GSP will not apply along with Indonesia's continued economic growth. From a GSP country, Indonesia will become a

country that follows the Most Favorite Nation (MFN) category tariff so that export commodities will enter the European Union market with higher tariffs.

### **3. The Role of Diaspora in the European Union in Promoting Indonesian SMEs**

The Indonesian Diaspora Network, or IDN for short, is an organization that manages the diaspora in Indonesia. Currently, IDN has 38 chapters spread across the world (IDN, 2024). One of the main driving engines of public diplomacy in Indonesia is this network between diasporas, which can assist the government in explaining, introducing, and also engaging in public diplomacy activities (Effendi, 2022). Indonesian diasporas also often participate in activities organized by the Indonesian government even though they are no longer residents of Indonesia. In addition, the Indonesian diaspora also often participates in associations or meetings that function as a means to discuss an issue or polemic in Indonesia (Pakpahan & Yoshanty, 2022).

The diaspora itself can be an entity that functions as a business intermediary between the country they are placed in and Indonesia. Since diasporas have extensive business networks and local market knowledge, they can facilitate trade activities (exports or imports) between their host countries and Indonesia (Syafitri et al., 2023). In this era of globalization, SMEs themselves must use strategic and efficient marketing communication strategies to get the maximum surplus, and reach foreign consumers (Rahmania, 2021). Therefore, one of the economic diplomacy strategies that can be carried out in combining these two aspects is that the Indonesian diaspora who are in foreign countries, create SMEs that can advance the economy in Indonesia.

One of the Indonesian diaspora companies established in Europe, precisely in Antwerp, Belgium, is Mailivings created by Adhyata Groups (Mailivings, 2024). Adhyata Group itself is an international business company that focuses on the growth of SMEs that want to strategically expand into international markets (Adhyata, 2024). Mailivings itself sells several products such as furniture, home goods, and also clothing as its main catalog. In the products sold by Mailivings, there are elements of Indonesian culture as well as a form of their duty in empowering Indonesian culture and diplomating it to foreign countries.

Furthermore, PT Bank Negara Indonesia or commonly referred to as BNI, once provided assistance or facilitated the Indonesian diaspora in marketing palm sugar products originating from Banyumas to various eating places in the Netherlands. In addition to the Netherlands, the palm sugar produced from Banyumas also wants to be exported to several other countries in Europe. (ANTARA News, 2024). Nesia Food, a food and ingredients brand from Indonesia, is one of the companies that received the Diaspora Loan and Xpora program from BNI, which placed its factory in Amsterdam, the Netherlands. Many processed food restaurants have also received Diaspora Loan and Xpora assistance, namely Warung Padang Lapek Jo, Nona Manis Restaurant, and Lestari Restaurant (Kontan, 2024). Diaspora Loan has also been done before by BNI in helping a café business located in Japan (BNI, 2023).

Through their involvement in various diplomacy activities supported by the Indonesian government, the Indonesian diaspora has a strategic role in public and economic diplomacy. By utilizing their market knowledge and local business networks in their countries of residence, they are not only cultural intermediaries but also important actors that help the growth of SMEs in Indonesia. How can this collaboration be translated into tangible initiatives to increase exports of Indonesian goods to other countries, such as the diaspora loan facilitated by BNI. Therefore, the diaspora must continue to be empowered and optimized to improve the Indonesian economy globally.

#### **4. The Role of Government in Empowering Apparel SMEs**

Through the Indonesia-European Union Comprehensive Economic Partnership Agreement (IEU-CEPA), the government has taken strategic steps to increase the competitiveness of Indonesian SMEs in the global garment industry. By reducing import taxes and simplifying trade restrictions, this agreement is expected to increase market access for Indonesian textile and apparel products to the European Union. Indonesian textile products are currently subject to import levies ranging from 7 to 12% in the European Union, while competing countries such as Bangladesh and Vietnam enjoy zero tariffs as a result of similar agreements.

SMEs have a big opportunity to increase their exports with the help of IEU-CEPA, especially regarding non-luxury goods which dominate the Indonesian garment market. Apart from that, through programs such as the Industrial Services and Solutions Center (ISSC) which improves product quality, the government also provides technical assistance to SMEs. Due to the global shift of production from China, Indonesia is becoming a more attractive option for manufacturers around the world. Indonesia is luckier because labor and raw resource prices are more affordable. Indonesia's textile exports are expected to reach \$7.99 billion in 2022, showing a strong rebound from the pandemic thanks to looser government regulations.

The Indonesian government plays an important role in overcoming trade barriers and increasing connectivity with European markets because of these encouraging policies. SMEs are expected to increase production and spur innovation thanks to increased market access to the EU, by exploiting this increasingly broad potential.

### **CONCLUSION**

Indonesia is a country that has the capacity to supply ready-to-wear clothing to various countries. Meanwhile, the European Union as the largest market for ready-to-wear clothing has not been fully reached by Indonesia, especially by local MSMEs due to limited regulations between the two countries. With the condition of the apparel sector as part of textile and clothing (TPT) MSMEs that have great potential in supporting export activities, Indonesia is still inferior to other ready-to-wear clothing exporting countries, especially in entering the European Union market. The Indonesia-European

Union Comprehensive Partnership Agreement (IEU CEPA) can bridge this gap by eliminating trade barriers between the two parties.

This paper argues that providing a strategic opportunity to increase the export potential of Indonesian MSMEs in the ready-to-wear clothing sector by reducing tariffs and aligning regulatory standards, allows them to compete better in the global market, especially in the European Union Region. The absence of trade agreements and economic cooperation hinders market access due to the lack of regulatory alignment between countries, especially for MSMEs that have not been able to meet export regulatory standards. With the IEU-CEPA, regulations will be more integrated, reducing the diversity of rules, and providing benefits from a more unified market. In addition, the IEU-CEPA also serves to maintain the sustainability of Indonesian clothing exports to the European Union, especially since Indonesia currently enjoys low tariffs through the Generalized System of Preference (GSP). However, as Indonesia's economy grows, this GSP status will disappear and be replaced with higher tariffs through the Most Favorite Nation (MFN) category.

This article also highlights how the diaspora makes a major contribution as a business bridge between Indonesia and countries in the European Union Region. The diaspora can help Indonesian MSMEs develop in the European Union market. The role of the government is equally important in providing financial assistance, export facilitation, and networking opportunities, such as through the Diaspora Loan program and the BNI initiative which have shown success in empowering MSMEs to penetrate the international market. The implementation of the IEU-CEPA is expected to open up new growth paths for MSMEs in the apparel sector, with continued support from the government and strategic utilization of the diaspora, thus enabling MSMEs to continue to innovate and adapt to global market demand.

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