

Indonesia and Taiwan: Partners for a Globally Competitive Textile Industry

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Past, present and future: Indonesia's second chance

PAST

We built early, then stalled

Significant investment in spinning, fabric and garment making, from denim to synthetics and viscose.

Mismanagement and macro shocks stifled growth.

China was still small and few countries posed a threat. The opportunity was wasted.

PRESENT

The tailwinds are back

Global brands are diversifying their sourcing beyond China.

Government is actively supporting the industry, with new trade agreements with Canada and the European Union[1] and incentives for foreign investment.

Leading Chinese and Indian textile players are already investing in Indonesia.

FUTURE

Our greatest opportunity yet

A complete textile ecosystem, fibre to finished garment, cuts lead times and cost.

Local fabric qualifies our apparel for duty-free access under the new agreements.

With the right partners, Indonesia can become Asia's next textile hub.

[1] Indonesia–Canada CEPA in force from 1 Dec 2026; Indonesia–EU CEPA targeted for early 2027

Indonesia: what we offer, what we need

WHAT INDONESIA OFFERS

Labour	Young population; labour-rich locations across Java
Current capacity	Spinning **[API: ± 2.15 million tons]**, Fabric **[API: ± 4.34 million tons]**, Garments **[API: ± 1.13 million tons]**, Exports **[API: USD 12.53 B]***
Home market	280M+ consumers in Southeast Asia's largest economy
Market access	Trade agreements: Canada, EU, Southeast Asia, China, Japan, Korea, Australia[1]
Fibre base	Viscose and polyester producers, **[API: ± 1.34 million tons/year]**** capacity
Special zones	Kawasan Industri Indonesia estates: tax holidays and duty-free inputs

WHAT INDONESIA NEEDS

Premium fabric	2/3 imported, **[API: USD 4.98 B]*** a year
Machinery	Modern knitting, sewing, dyeing and finishing; over 20 years old
Adjacencies	Local trims, elastics, dyes and textile chemicals beside our mills
Know-how	Functional and sustainable fabrics that global brands now require
Talent	Technical specialists in dyeing, finishing and product development
Partners	Equity and technology partners to complete the fabric ecosystem

[1] Indonesia–Canada CEPA (in force 1 Dec 2026), Indonesia–EU CEPA (targeted 2027), ASEAN and RCEP

* Source : Ministry of Industry of the Republic of Indonesia, Central Bureau of Statistics of Indonesia

** Source : Indonesian Fiber & Filament Yarn Producers Association (APSyFI)

Taiwan's strengths complete our ecosystem

Indonesia needs	Taiwan's strength	Partnership in practice
01 Fabric	~70% of the world's functional fabrics; leaders in knits, wovens and recycled polyester	Joint-venture mills in Indonesia, anchored by garment makers' orders
02 Machinery	Smart knitting, sewing, dyeing and finishing machinery makers	Equipment supply with local technical service and spare parts
03 Know-how	Recycled and bio-based fibres; world-class textile research institutes	Technology licensing and joint product development
04 Talent	Engineers experienced in running mills across Asia	Training programmes and skills transfer with API
05 Brand access	Trusted fabric suppliers to Nike, Adidas, Lululemon and others	Fabric and garments made side by side for the same brands
06 Adjacencies	Leading makers of trims, elastics, dyes and textile chemicals	Supplier parks beside new mills and garment makers
07 Financing	Lower borrowing costs than in Indonesia; Taiwanese banks could become very competitive here	Taiwanese bank financing for joint ventures, mills and exporters

Source: Taiwan Ministry of Economic Affairs, via AmCham Taiwan (functional fabric share)

A proven playbook: Taiwan builds hubs

Taiwanese industry has repeatedly built complete manufacturing ecosystems in host countries.

FOOTWEAR · 1980S–2000S

Dongguan

Taiwanese shoemakers moved in, kept design and development in Taiwan, and turned Dongguan into one of the world's footwear capitals.

TEXTILES · 2000S–TODAY

Vietnam

Taiwanese textile leaders built large fibre and fabric mills, using Vietnam's trade agreements to serve global brands.

FOOTWEAR · 1990S–TODAY

Indonesia

Taiwanese footwear makers have operated here for three decades. Taiwanese industry already knows Indonesia works.

Indonesia's textile ecosystem could grow much faster with Taiwan.

How government support can accelerate the ecosystem

Industry respectfully offers these areas for joint consideration with government.

01

Ports and logistics

Deep-sea port capacity and direct vessel services to Europe and the US West Coast.

02

Financing

Competitive long-term finance for new mills, machinery and modernisation.

03

Labour incentives

Support for hiring and training, with working hours in line with regional peers.

04

Tax holidays

Tax holidays and duty-free machinery imports for new textile investment.

05

More trade agreements

Building on the Canada and European Union agreements with further markets, including the US.

ENABLER

Joint taskforce

One government–industry forum to set priorities, track progress and speed approvals.

A partnership that benefits both

Taiwan: expertise
Functional fabrics, machinery and technology

+

Indonesia: scale
Labour, land, market access and garment makers

=

In-country verticality
Fibre to finished garment in one country, with access to key consumer markets

FOR TAIWAN

- Duty-free access to Canada and the EU for fabric and garments made in Indonesia
- Scale to grow: labour, sites and a home market of 280M+ consumers
- Garment makers next door as anchor customers

FOR INDONESIA

- Premium fabric made at home: shorter lead times, duty-free apparel
- New investment, technology and skilled jobs
- A complete, export-ready textile ecosystem

Ways to partner: joint-venture mills · technology alliances · skills programmes · zone co-investment

NOW IS THE TIME. Let us build it together.

印尼與台灣：攜手打造具全球競爭力的紡織產業

Pak Maniwanen，Busana Apparel Group 董事長

過去、現在與未來：印尼的第二次機會

過去

起步早，卻停滯不前

在紡紗、布料與成衣製造大量投資，涵蓋牛仔布、合成纖維與嫘縈。

管理不善與總體經濟衝擊阻礙了成長。

當時中國規模尚小，競爭者寥寥無幾，機會卻被錯失。

現在

順風再起

全球品牌正將採購分散至中國以外。

政府積極支持產業，與加拿大及歐盟簽署新貿易協定[1]，並提供外國投資獎勵。

中國與印度的領先紡織業者已開始投資印尼。

未來

前所未有的最大機會

從纖維到成衣的完整紡織生態系，縮短交期並降低成本。

在地布料讓我們的成衣符合新協定的免關稅資格。

有了合適的夥伴，印尼可成為亞洲下一個紡織樞紐。

[1] 印尼–加拿大全面經濟夥伴協定（CEPA）自2026年12月1日生效；印尼–歐盟CEPA預計2027年初生效

印尼：我們的優勢與需求

印尼的優勢

勞動力	人口年輕；爪哇島各地勞動力充沛
現有產能	紡紗 **[API: ± 2,15 million tons]**、布料 **[API: ± 4.34 million tons]**、成衣 **[API: ± 1.13 million tons]**、出口 **[API: USD 12.53 B]**
內需市場	東南亞最大經濟體，逾2.8億消費者
市場准入	貿易協定：加拿大、歐盟、東南亞、中國、日本、韓國、澳洲[1]
纖維基礎	嫘縈與聚酯纖維生產商，產能 **[API: ± 1.34 million tons/year]**
經濟特區	Kawasan Industri Indonesia 工業區：免稅期與原料免關稅

印尼的需求

高端布料	三分之二仰賴進口，每年 **[API: USD 4.98 B]**
機械設備	現代化針織、縫紉與染整設備 已逾20年
周邊產業	在工廠旁就近供應輔料、鬆緊帶、染料與紡織化學品
技術能力	全球品牌所要求的機能性與永續布料
人才	染整與產品開發的技術專才
合作夥伴	股權與技術夥伴，完善布料生態系

[1] 印尼–加拿大CEPA（2026年12月1日生效）、印尼–歐盟CEPA（預計2027年）、東協及RCEP

台灣的優勢，完善我們的生態系

印尼的需求	台灣的優勢	合作方式
01 布料	全球約70%的機能性布料；針織、梭織與回收聚酯的領導者	在印尼設立合資工廠，以成衣廠訂單為支撐
02 機械設備	智慧針織、縫紉與染整機械製造商	設備供應，並提供在地技術服務與零件
03 技術能力	回收與生質纖維；世界級紡織研究機構	技術授權與共同產品開發
04 人才	具亞洲各地工廠營運經驗的工程師	與印尼紡織協會（API）合作培訓與技術移轉
05 品牌通路	Nike、Adidas、Lululemon等品牌信賴的布料供應商	為同一品牌就近生產布料與成衣
06 周邊產業	輔料、鬆緊帶、染料與紡織化學品的領先製造商	在新工廠與成衣廠旁設立供應商園區
07 融資	借貸成本低於印尼；台灣銀行在印尼可望極具競爭力	台資銀行為合資企業、工廠與出口商提供融資

資料來源：台灣經濟部，經台北市美國商會引述（機能性布料市占）

成功模式：台灣打造產業樞紐

台灣產業一再於海外建立完整的製造生態系。

鞋業 · 1980至2000年代

東莞

台灣鞋廠進駐，並將設計研發留在台灣，使東莞成為全球製鞋重鎮之一。

紡織 · 2000年代至今

越南

台灣紡織龍頭設立大型纖維與布料廠，運用越南的貿易協定服務全球品牌。

鞋業 · 1990年代至今

印尼

台灣鞋業在此經營已三十年，台灣產業早已證明印尼可行。

有了台灣，印尼紡織生態系將加速成長。

政府支持如何加速生態系發展

產業界謹提出以下領域，供與政府共同研議。

01

港口與物流

深水港產能，以及直航歐洲與美國西岸的航運服務。

02

融資

為新廠、機械設備與現代化提供具競爭力的長期融資。

03

勞動獎勵

支持招聘與培訓，並使工時與區域同業一致。

04

免稅期

新紡織投資享有免稅期及機械進口免關稅。

05

更多貿易協定

在加拿大與歐盟協定的基礎上，拓展至包括美國在內的更多市場。

推動機制

聯合工作小組

設立政府與產業共同論壇，訂定優先事項、追蹤進度並加速審批。

互惠雙贏的夥伴關係

台灣：專業
機能性布料、機械設備與技術

＋

印尼：規模
勞動力、土地、市場准入與成衣廠

＝

在地垂直整合
從纖維到成衣在同一國家完成，並可進入主要消費市場

對台灣

- 在印尼生產的布料與成衣，可免關稅進入加拿大與歐盟
- 成長規模：勞動力、廠址及逾2.8億消費者的內需市場
- 成衣廠近在咫尺，成為穩定的主力客戶

對印尼

- 高端布料在地生產：交期更短，成衣免關稅
- 新投資、新技術與技能型就業
- 完整且具出口競爭力的紡織生態系

合作方式：合資工廠 · 技術聯盟 · 技能培訓 · 經濟特區共同投資

時機就是現在！讓我們攜手共創未來。