

Presenting Dutch Trade and Investment in Indonesia



Netherlands

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Foreword



Indonesia holds strategic importance for the Netherlands. As the largest economy in Southeast Asia, a gateway to the ASEAN market, and a country rich in natural resources, Indonesia offers vast opportunities for trade and investment. The Netherlands has long been a key economic partner, consistently ranking as the largest European investor in Indonesia.

This booklet highlights the depth and breadth of Dutch trade and investment in Indonesia. Our Embassy is committed to deepening this relationship by identifying new opportunities. Currently, we have two priority sectors: **Food and Sustainable Agriculture** as well as **Water**. In addition, we focus on: **Life Sciences and Health, Maritime, Renewable Energy**, as well as **Waste Management**. The selection of the sectors is based on the demand in Indonesia, coupled with the added value that the Netherlands has on the selected sectors.

Dutch investments in Indonesia extend well beyond these sectors. Dutch companies have been present in the country for decades, contributing to economic growth through job creation, tax revenues, innovation, and knowledge sharing. These investments span across various provinces and industries, reflecting the diverse and dynamic nature of our economic engagement. It is a privilege and pleasure to present this overview of Dutch trade and investment in Indonesia. I hope that this small booklet will further strengthen the outstanding relationship that already exists.

Marc Gerritsen
Ambassador of the Kingdom of the Netherlands to Indonesia.

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High-quality and sustainable strawberry cultivation through CEA (Controlled Environment Agriculture)



World Horti Center: The knowledge and innovation center for international greenhouse horticulture. A leading platform where business, education, research and government jointly innovate, connect, inspire and share knowledge.

Introducing the Netherlands

Map of the Netherlands



Location

1. Amsterdam (and Airport Schiphol)
2. Eindhoven
3. Groningen
4. The Hague
5. Maastricht
6. Middelburg
7. Rotterdam
8. Utrecht

How the Netherlands make a difference?

Through our interactive approach to finding innovative solutions to the big challenges facing the world today. The Dutch way of thinking and working has been shaped by centuries of living in the low-lying delta of the Netherlands.

Through the ages, the Dutch have joined forces to find ingenious ways to tackle challenges like water, urbanisation, energy, food, health and security. By being inventive, pragmatic and open to new challenges, the Dutch have created a flourishing and resilient land.

The Netherlands is a constantly evolving ecosystem of cities, industry, agriculture and nature, all integrated through smart infrastructure. It is a source of knowledge and experience that the Dutch are keen to share with others. Learning from the past to create a better future. Together, seeking sustainable solutions for the most liveable world.



Eastern Scheldt Storm Surge Barrier

The Netherlands in Numbers

1st

Largest flower exporter

Source: OEC, 2022

3rd

Largest exporter of agricultural products in the world

Source: WUR/CBS, 2023

4th

Largest importer of goods in the world, USD 842 billion

Source: Statista, 2023

4th

Largest exporter of goods in the world, USD 935 billion

Source: Statista, 2023

4th

Leading economy worldwide by Foreign Direct Investment inward stock, USD 2.9 trillion

Source: Statista, 2023

6th

Greatest place to live

Source: World Happiness Report, 2024

6th

Gross Domestic Product (Purchasing Power Parity) per capita in Europe

Source: World Bank, 2024

7th

On the Global Innovation Index

Source: WIPO, 2023

9th

On the World Competitiveness Ranking

Source: International Institute for Management Development, 2024

Facts & Figures

Official name:

Kingdom of the Netherlands

Capital:

Amsterdam

Seat of government:

The Hague

Form of government:

Parliamentary democracy (cabinet of Prime Minister and Ministers) within a constitutional monarchy

Head of State:

His Majesty King Willem-Alexander, King of the Netherlands, Prince of Orange-Nassau

Location:

Western Europe bordering Germany, Belgium and the North Sea

Administrative structure:

The Kingdom consists of 4 countries. The Netherlands in Europe and 3 islands in the Caribbean: Aruba and Curaçao and St. Maarten.

Special municipalities:

The overseas islands of Bonaire, Saba and St. Eustatius, all three of which are located in the Caribbean.

Surface area:

41,543 km²

Number of inhabitants (2024):

18 million

Monetary Unit:

Euro

Languages:

Dutch, Frisian and on the overseas islands also English and Papiamentu

GDP per capita (World Bank, 2024):

57,800 US dollars

Number of provinces:

12

Number of inhabitants per km² (2024):

533

Unemployment Rate (CBS, 2024):

3.7%

English spoken:

90%

Indonesia & the Netherlands:

Creating partnerships for a sustainable future

Indonesia is a vibrant and growing economy in Southeast Asia, with strong ambitions for a greener and more resilient future. The Netherlands is a longstanding and trusted economic partner, particularly in the areas of **food and sustainable agriculture, water, life sciences and health, maritime, renewable energy**, as well as **waste management**. Dutch knowledge in innovation and sustainable practices is highly valued in these sectors.

Over the years, Indonesia and the Netherlands have built a strong relationship with close economic ties. With the Netherlands being the largest European investor in Indonesia, we share the vision of building a more sustainable and inclusive economy. We aim to strengthen economic ties and work together on solutions that have a lasting impact. Solutions that protect the environment and support local communities.



Greenhouse Tomatoes at World Horti Center

Food and Sustainable Agriculture: Co-creating future-proof food systems

Horticulture sector in Indonesia plays an important role in food security and economic development. With rising demand for fresh and healthy produce, there is a need for more sustainable, efficient, and climate-smart production.

The Netherlands has valuable experience in sustainable horticulture and can work together with Indonesia on innovative solutions that support local production. There is great potential to collaborate on improving starting materials, smart growing systems, post-harvest process, agrologistics, and climate-smart farming. By joining forces, we can help make horticulture in Indonesia more productive, efficient, and future-proof.

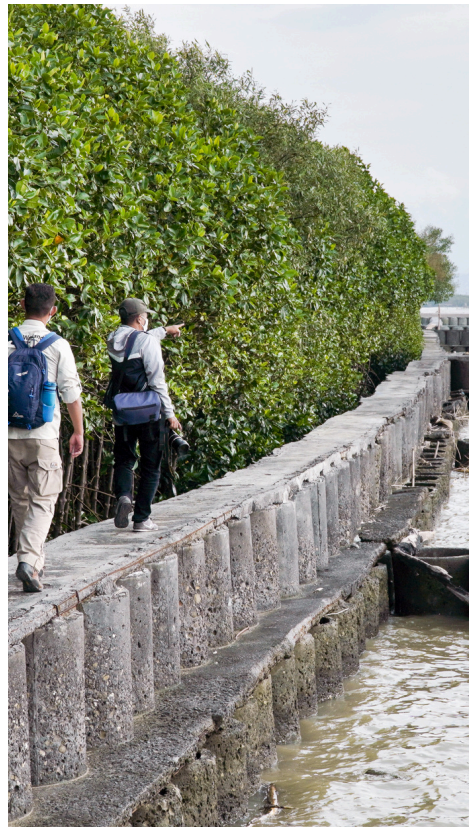
In addition to the food systems approach in Indonesia, nature and biodiversity remain a strategic focus for the Netherlands, particularly sustainable palm oil production and agroforestry. Our initiatives include SustainPalm, NISCOPS (National Initiatives for Sustainable & Climate Smart Oil Palm Smallholders), working group on scaling up agroforestry, and SDGP (Sustainable Development Goals Partnership) Facility on cocoa and coconut agroforestry. The Netherlands also explores further collaboration in the field of digital transformation in the agri-food sector. Together, we contribute to a more sustainable food system for all.

Water: Partnering for a water-secure future

Indonesia's focus on water self-sufficiency and climate resilience opens a great collaboration with the Netherlands. With centuries of experience in managing complex water systems, the Netherlands is well placed to support Indonesia's ambitions through smart and sustainable solutions.



Vegetables Grown at World Horti Center



Mangrove forest combined with sea wall

From advanced purification technologies to efficient water reuse systems, Dutch expertise has long assisted countries around the world tackle water scarcity. A striking example is the Dutch approach to circular water use in urban areas, where rainwater is captured, treated, and reused, reducing pressure on freshwater resources. This kind of integrated thinking cloud offer valuable insights for Indonesian cities facing rapid urbanisation and increasing demand for clean water.

Another area of shared interest is coastal protection and flood management. Like Indonesia, the Netherlands is a low-lying country vulnerable to rising sea levels.

Dutch nature-based solutions, such as sand motors and living shorelines, combine engineering with natural ecosystems to provide long-term protection while enhancing biodiversity. These approaches could support Indonesia's coastal resilience in an environmentally and economically sustainable way.

Last but not least, the Netherlands also explores further collaboration in the field of lowland development and irrigation. The Netherlands can offer expertise on optimising existing lowland areas to enhance food security, with sustainable water management as a key enabler of agricultural productivity.



Dutch diamond approach of water cooperation in Indonesia

Life Sciences and Health: Promoting longevity and providing answers to today's global healthcare challenges

The Indonesian Ministry of Health is spearheading a comprehensive national healthcare transformation agenda built on six key pillars: strengthening primary care, enhancing referral systems, improving health resilience, reforming health financing, developing the health workforce, and advancing health technology. These initiatives aim to raise the quality of care and access to services for all Indonesians.

The Netherlands is renowned for its high standards of care, consistently ranking among the top in the Euro Health Consumer Index thanks to its accessibility, quality, innovation, and preventive approach. That is why the Indonesian Ministry is keen to send Indonesian specialists to the Netherlands for fellowship training at Dutch medical universities. Furthermore, Dutch companies in the Life Sciences and Health sector offer expertise in hospital design development, cutting-edge medical equipment, medical education and training, healthcare systems, and digital medical records. Many leading Dutch firms continue to support Indonesia's efforts to improve healthcare and expand their involvement through partnerships with multilateral development banks.

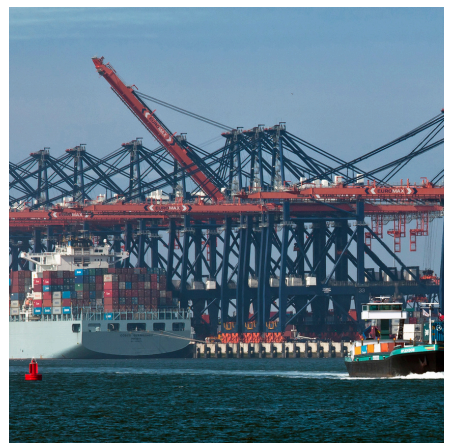
Maritime: Together for sustainable seaports and shipping

As an archipelagic country, Indonesian seaports are central to connecting people and supporting international trade. It also contributes to reaching the country's goals: high economic growth, food and energy self-sufficiency, a developed green and blue economy, and downstreaming of its resources. This provides space for collaboration with Dutch partners to enable more efficient and cost-effective logistics and infrastructure.

Being the maritime center and gateway of Europe, the Netherlands is home to one of the strongest and most complete maritime clusters in the world, with expertise in ports, dredging, shipbuilding, maritime knowledge, and services.



The Philips Echo Navigator helps cardiologists to perform minimally-invasive structural heart disease repairs



Delta Terminal, Port of Rotterdam

Furthermore, Dutch companies and the government have a longstanding bilateral maritime cooperation with Indonesian counterparts. This makes the Netherlands a maritime one-stop hub and a partner to support Indonesia's sea transport sector in becoming more efficient and environmentally responsible while remaining globally competitive.

Renewable Energy: Let's accelerate the energy transition together!

Indonesia's ambitious long-term climate goal is reflected in its Second Nationally Determined Contribution with emission reduction targets of 31.89% unconditionally and up to 43.2% with international support by 2030, while introducing a more transparent methodology based on absolute emission levels. For the energy sector, this translates into renewable energy contributing 19-23% of the energy mix by 2030 and 70% by 2060.

Indonesia and the Netherlands signed a Memorandum of Understanding on Energy Transition during the G20 Energy Transition Ministerial Meeting in Bali in 2022. The agreement covers cooperation in developing diverse energy sources, financing transition projects, and improving energy efficiency. The Netherlands brings extensive expertise in wind and solar PV, energy storage, hydrogen, and waste to energy, as well as experience in designing energy-efficient buildings through nature-based solutions, smart lighting, and advanced HVAC systems. While the challenges in Indonesia are somewhat different, these principles can be adapted locally. The Netherlands is eager to collaborate with Indonesian partners to initiate, develop, and manage renewable energy projects that align with Indonesia's ambitious goals.



Floating solar farm in Zwolle

Waste Management: The future is circular

The waste management issue is becoming a higher national priority for the Indonesian government. Both Indonesia and the Netherlands perceive the transition toward a circular economy as a way forward to address waste issues. Therefore, the two countries can join hands in turning the challenges in this sector into economic opportunities.

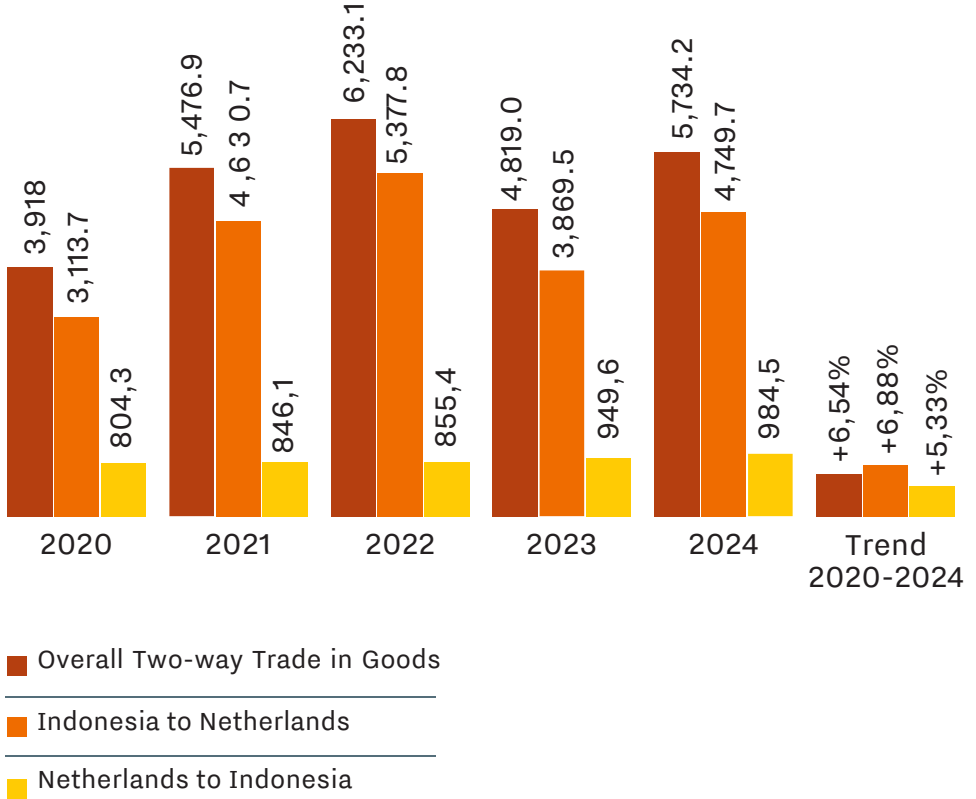
The Netherlands ranks 1st for controlled solid waste management, according to the Environmental Performance Index and is a front-runner in the circular economy. The Dutch government can collaborate with the Indonesian government by sharing lessons learnt and our insights on setting up extended producer responsibility or circular public procurement, as well as sharing tools and best practices on topics like waste recovery, circular agro-food, water and waste management, chemical recycling and innovative packaging. Moreover, Dutch companies, knowledge institutes and NGOs can work with Indonesian partners to develop and implement innovative technologies, create sustainable new business models, identify circular opportunities, as well as support local circular entrepreneurship.



Recycling plastic machine

Indonesia & the Netherlands Trade in Goods

in million USD



Source: Indonesian Statistics, processed by the Indonesian Ministry of Trade, 2024

Top 3 Non Oil-Gas Export from Indonesia to Netherlands in 2024:

- 1 Animal or Vegetable Fats and Oils: 14%
 - 2 Miscellaneous Chemical Products: 13%
 - 3 Footwear: 13%
-

Top 3 Non Oil-Gas Export from Netherlands to Indonesia in 2024:

- 1 Mechanical Machines/Planes: 20%
- 2 Electrical Machinery and Equipment and Parts Thereof: 13%
- 3 Plastics and Articles Thereof: 7%

Source: Indonesian Statistics, processed by the Indonesian Ministry of Trade, 2024.

Top 10 Foreign Investors in Indonesia

Investment (in Million USD)

 1. Singapore		20075.2	 6. Japan		3463.9
 2. Hongkong		8216.5	 7. South Korea		2987.7
 3. China		8106.9	 8. Netherlands		1977.1
 4. Malaysia		4244	 9. Australia		1050.3
 5. USA		3696.8	 10. Great Britain		745.4

Netherlands as the European Largest Investor in Indonesia

Investment (in Million USD)

 1. Netherlands		1977.1
 2. Great Britain		745.4
 3. Germany		343

Source: Indonesian Ministry of Investment and Downstream Industry, 2024.

Economic Activities of the Netherlands in Indonesia

The Netherlands is the largest EU investor in Indonesia. According to data from the Ministry of Investment and Downstreaming in 2024, Dutch investments in Indonesia totaled USD 1.98 billion in 5,706 projects, making the Netherlands the 8th largest investor in Indonesia.

The Netherlands wants to develop further its investment footprint in Indonesia in sectors in which it has world-leading expertise, such as food and sustainable agriculture, water, healthcare, renewable energy, as well as waste management and circular economy. To complement private investments, the government has created a EUR 300 million investment fund through a Dutch investment organisation, Invest International, for public infrastructure projects in Indonesia.

Recent and prospective economic activities from the Netherlands in Indonesia including, but not limited to:

AkzoNobel

Based in Amsterdam, **Akzo Nobel** is the world's largest paint and coating company, and a major producer of specialty chemicals. The company has two factories in Bekasi and one factory in Surabaya, employing many Indonesian talents. The company in Bekasi manufactures the famous premium-brand 'Dulux' paint, and provides professional certificates to painters.



AMPOWR™

Last year Dutch company **AmPowr BV** signed a Memorandum of Understanding with a subsidiary of PT Energi Pelabuhan Indonesia, a subsidiary of Pelindo, a state-owned port operator, for a built-operate-transfer of an onshore power supply facility, to reduce emission from vessels docking in the Tanjung Priok port. The duration of the agreement is 15 years.



De Heus opened their 5th factory in Indonesia in October 2024, in Purwodadi, Central Java, underscoring De Heus' unwavering commitment to advancing sustainable livestock farming and empowering local communities in Indonesia. The factory in Purwodadi has production capacity of 15,000 tons per month, contributing to De Heus' overall growth and reinforcing its position as a leading animal feed company in Indonesia.



East West Seeds Indonesia is the first integrated vegetable seed company in Indonesia, keeping its commitment as Farmer's Best Friend. The company produces high quality vegetable seeds through the development of local, cutting-edge seed industry to increase farmers' and contribute to food security for Indonesia.



FFI officially opened a new factory in Bekasi in 2024 to produce 700 million kg of dairy products per annum, with a potential to grow to 1 billion kg. The new factory in West Java, covering an area of 25.4 Ha with a total investment of USD 228 million, is the largest manufacturing plant in the world for Friesland Campina, the parent company of PT Frisian Flag Indonesia.



Haskoning is an independent international consultancy company established in 1881. Haskoning has been present in Indonesia for more than 45 years. The company has more than 6,600 employees spread across offices in more than 25 countries worldwide, including in Indonesia – working together with clients on future-proof solutions.

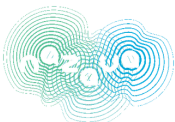
As a part of Haskoning, **Pondera Consult** is a renewable energy consultant and project developer, establishing presence in Indonesia since 2018 to harness Indonesia's abundant natural resources and foster the transition to renewable energy.



IMCD Indonesia is a leading distributor and solutions provider of specialty chemicals and ingredients. With a strong local presence and access to a global network, the company brings tailored, innovative solutions across industries such as food & nutrition, beauty & personal care, pharmaceuticals, and more. In Jakarta, the company operates an enhanced food and nutrition laboratory, which also includes an ultra-high temperature pilot laboratory for the development and innovation solutions in beverage, soup and sauces across the Asia Pacific.



PT Multi Bintang Indonesia is a leading beverage company that is part of the Heineken Company and proud to have been a part of Indonesian history for more than 90 years. The company is listed on the main board of the Indonesian Stock Exchange since December 1981. Multi Bintang has two factories in Indonesia, Mojokerto and Tangerang.



Since 2009 in Indonesia, **Nazava** is a social impact enterprise committed to providing safe and affordable drinking water solutions. The company primarily produces household water filters using Dutch technology, manufactured in Indonesia, employing nearly 50 full-time staff members based in Bandung, West Java.



Versuni has a manufacturing plant in Batam, providing 4000 jobs for local talents, and exports the manufactured goods to overseas markets.



In partnership with the Indonesian Salim Group, Dutch company Ahold Delhaize is present to serve Indonesian consumers with **Super Indo** supermarket. Super Indo is present in more than 40 cities throughout Java and Sumatra, supported by more than 10,000 trained staff.



Verstegen grows spices sustainably and supplies the very best quality herbs and spices. Verstegen is part of the project called Regenerative Agroforestry systems to redesign the cultivation of pepper.



Vopak invested and operates two storage tank infrastructures in Merak and Jakarta. The terminal in Merak has a capacity of 130,400 cbm for bulk liquid products, whilst the one in Jakarta has a capacity of 351,425 cbm, designed to handle clean petroleum products.



On 3 October 2024, **PT Wavin Indonesia** inaugurated its new manufacturing plant at the Batang Integrated Industrial Park. The factory has become production hub for the Asia Pacific region, supplying sustainable sanitation and water management solutions. The total investment is around USD 51 million, absorbing close to 200 employees.



Witteveen & Bos established an office in Jakarta in 1978, offering a broad range of engineering solutions and advisory, employing and transferring knowledge to many Indonesians. In partnership with PT Geo Dipa Energy, the company conducted a feasibility study to extract lithium from the brine of the Dieng Plateau geothermal power plant, aligning with the government's ambition for sustainable mining of critical minerals.

Financing options for further investment



One of the world's largest pension investors, **APG Asset Management** NV co-invests with the Abu Dhabi Investment Authority (ADIA) and the Indonesia Investment Authority (INA) in Indonesia's first toll road investment platform on the Trans-Java Toll Road sections of Kanci-Pejagan and Pejagan-Pemalang, that is expected to boost Indonesia's regional connectivity and economic development.



Climate Fund Managers (CFM) is an investment manager contributing towards mitigating and building resilience to climate change in the areas most affected by its consequences, by using blended finance to attract public and private capital to invest in

high-impact sectors in emerging economies. CFM provide financing solutions for infrastructure developers in the renewable energy, water sanitation and ocean sectors, across the entire project lifecycle.



An EUR 440 million blended finance initiative funded by the Dutch Ministry of Foreign Affairs. It is implemented by a consortium led by FMO, together with SNV, WWF-NL, and Climate Fund Managers.

DFCD aims to unlock private sector investment in climate-resilient projects that deliver both environmental impact and economic returns. In Indonesia, the fund focuses on key themes such as food and nutrition security, access to clean drinking water, and the protection of forests and agroforestry systems.



FMO is the Dutch entrepreneurial development bank, with a mission to enable global entrepreneurs to increase inclusive and sustainable prosperity. FMO invests in 85 countries, including in Indonesia on energy, financial institutions, agri-food & water, and infra and manufacturing. Total investments made thus far is more than USD 220 million in 20 projects.



In a significant move to strengthen bilateral ties, the Dutch public-private financial institution **Invest International** has signed a Memorandum of Understanding with the Government of Indonesia, covering EUR 300 million in grants and loans aimed at accelerating grant and loan aims to accelerate cooperation in funding key public infrastructure projects across Indonesia. The MoU focuses on vital sectors such as water management, agriculture, renewable energy, waste management, and healthcare.



PIDG is an innovative infrastructure development and finance organisation funded by seven Governments: the UK, the Netherlands, Switzerland, Australia, Sweden, Canada, and Germany. Through its subsidiary of Infracore Asia, PIDG has three renewable energy development projects in Indonesia, on wind, hydro, and hybrid power solutions.

Several Prospective Economic Activities



APM Terminals, in collaboration with Pelindo, Indonesia's state-owned port company, is exploring investments in 100% green, efficient and future-ready ports to support the national vision of Golden Indonesia 2045-accelerating sustainable infrastructure, strengthening economic competitiveness and positioning Indonesia as a growing regional maritime and logistics hub. This includes Makassar New Port and Jakarta New Priok Container Terminals 2-3, among others.



ESRO group serves customers in more than 80 countries with high-quality animal proteins. ESRO owns production facilities on four continents and is exploring the opportunity to develop a dairy farming facility in Indonesia.



FoodVentures excels in initiating and operating new greenhouse locations in frontier markets, setting new standards for sustainable modern farming. In 2023, FoodVentures conducted a study on greenhouse horticulture in Indonesia in which it can contribute to the development of sustainable and innovative horticulture sector in Indonesia.



HVA is keen to support Indonesia's food security goals, by setting-up an international dairy farm, possibly together with a state owned company.



As one of the key players in the healthcare industry, **Philips** is keen to support local production in Indonesia, not only to meet the local content requirements, but also to contribute to the long-term relations with Indonesia. Building on its current activities, Philips plans to make new investments in the high-tech healthcare technology.



Rabobank/Acorn intends to create the opportunity to sustainably link smallholder farmers to the voluntary carbon market in Indonesia and contribute achieving the Nationally Determined Contribution (NDC) conditional targets.



Schiphol Group is exploring opportunities for strategic partnership with Indonesian airport(s), supporting Indonesia with expertise and experience in developing world-class airports.

Team Netherlands for Pantura Java Coastal Protection

Netherlands stands ready to accelerate coastal protection in northern Java through up to EUR 200 million in financing, technical assistance, knowledge sharing, and sector-wide cooperation on integrated smart and hybrid (green-gray) solutions. The offer is supported by a broad **Team Netherlands** alliance, including leading research institutes like Deltares, engineering firms like Haskoning, Witteveen & Bos, contractors Boskalis, Van Oord, and NGO's such as Wetlands International, working closely with Indonesian ministries, agencies, and local partners.

Netherlands Economic Network in Indonesia

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