



Indonesia Seafood : Safe, Sustainable and Traceable to EU Market



Nilanto Perbowo

Director General of Product Competitiveness

Ministry of Marine Affairs and Fisheries of The Republic of Indonesia

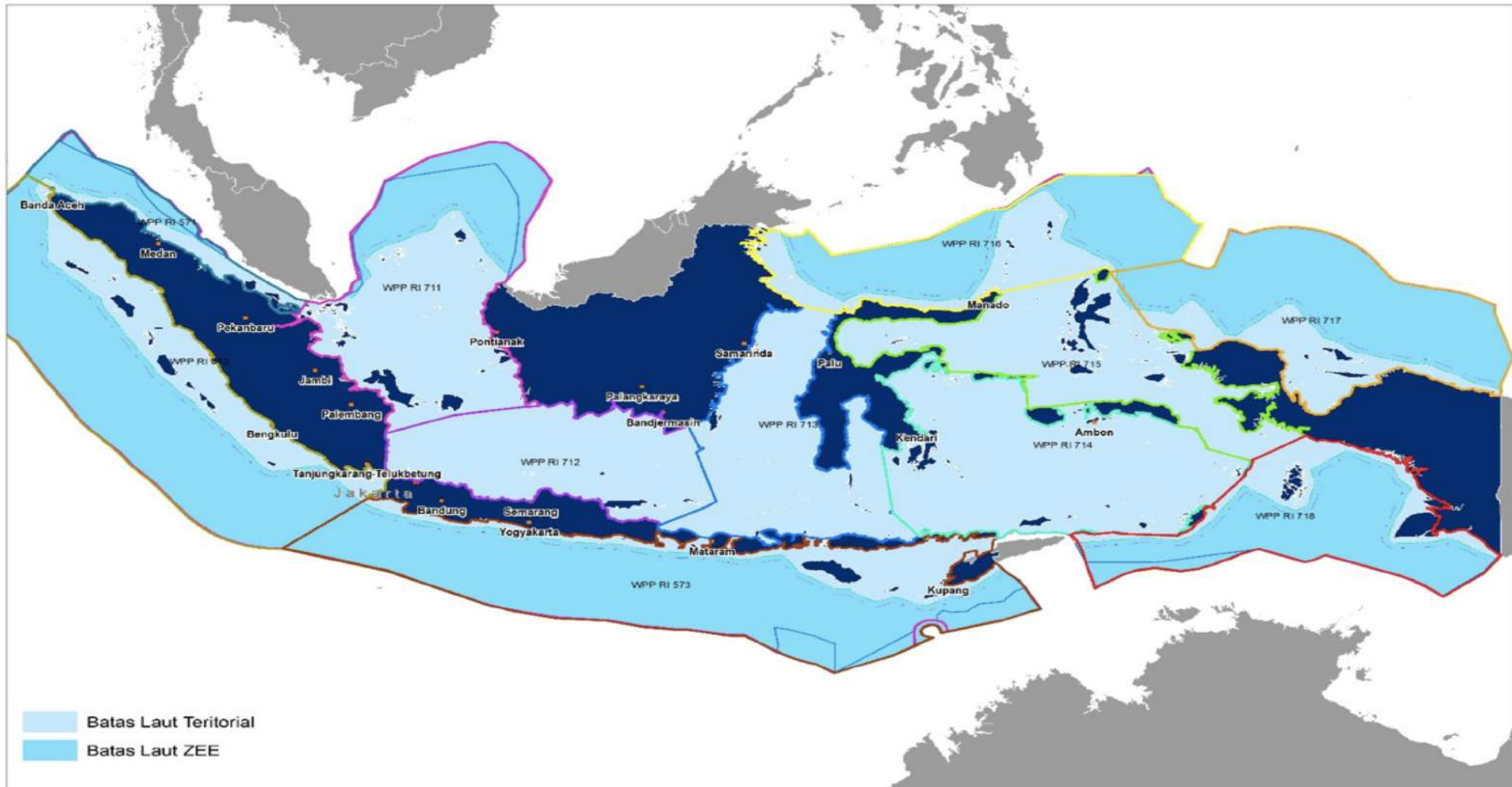
8 July 2020



INDONESIA'S AQUATIC AND MARINE RESOURCES

2/3 of Indonesia's territory are marine waters (5,8 mill km²) and has 95.181 km coastal line, the world 2nd longest

Indonesia's maritime borders based on 1982 LOSC



INDONESIA FISHERIES : FACTS AND FIGURES

Capture Fisheries Production (2018)*	7.25 million MT
Aquaculture Fisheries Production (2018)**	17.25 million MT
Fisheries Export Value (2019)	4.94 billion USD
Fisheries Import Value (2019)	477 million USD
No. of modern seafood processing plants	444 units

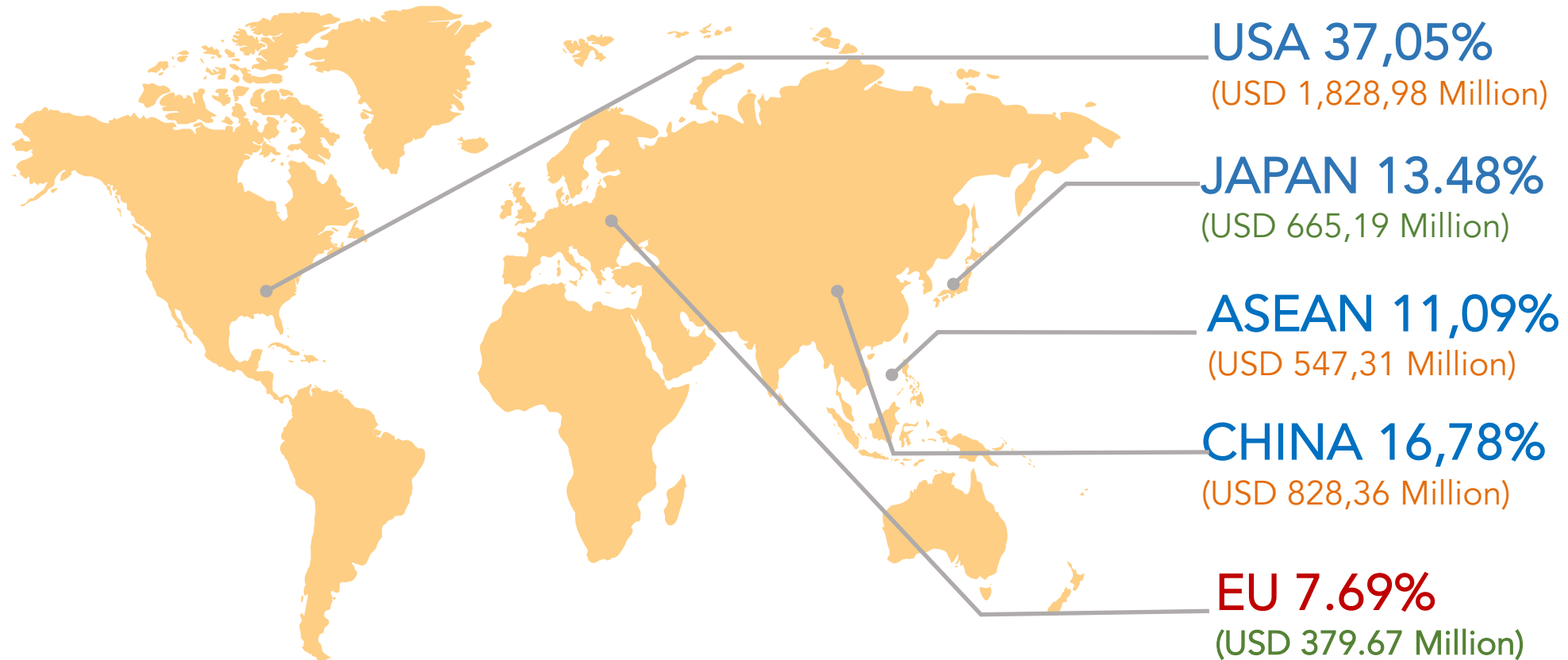
Note: * Preliminary figure

** Preliminary figure: including seaweed production



KEY MARKET GOALS OF INDONESIA FISHERY PRODUCTS, 2019

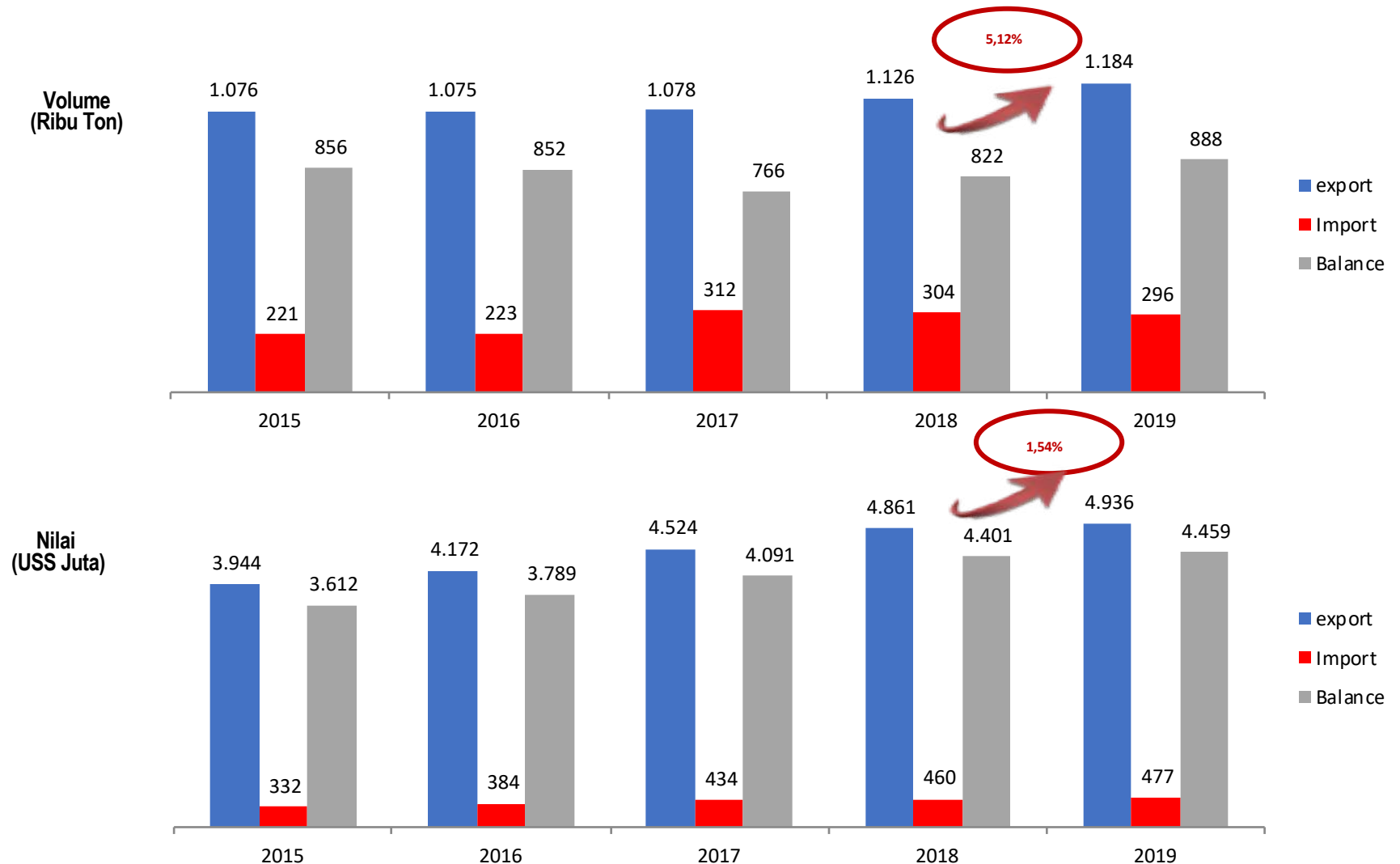
(USD 4.94 BILLION)



Source: BPS processed DGPC

FISHERY PRODUCTS EXPORT & BALANCE OF TRADE (2015 – 2019)

Exports in 2018-2019 showed a positive trend. **Exports volume and value increased 5.12% and 1.54%, respectively.** The 2018 trade balance was a **surplus of USD 4.46 Billion**













INDONESIA EXPORT BASED ON MAIN COMMODITIES, 2019

VOLUME

1.184,2 Thousand MT

The biggest volume was contributed from **SEAWEED**, while the highest exported value came from **SHRIMP**.

 <p>17,67% 209,24 Thousand MT</p>	 <p>17,54% 207,70 Thousand MT</p>	 <p>15,55% 184,13 Thousand MT</p>	 <p>12,15% 143,85 Thousand MT</p>	 <p>2,19% 25,94 Thousand MT</p>
 <p>34,83% US\$ 1.719,17J MILLION</p>	 <p>15,14% US\$ 747,54 MILLION</p>	 <p>11,27% US\$556,29 MILLION</p>	 <p>7,97% US\$ 393,50 MILLION</p>	 <p>6,58% US\$324,85 MILLION</p>

value

US\$ 4,94 BILLION

Source: BPS processed DGPC
Covered 480 fishery products, HS Code 2017

DESTINATION COUNTRIES BASED ON MAIN EXPORT COMMODITIES, 2019

SHRIMP becomes the main commodity with a total export value of **USD 1.72 Billion**. **US** is the **major market** destination of Indonesian shrimp.



SHRIMP
(USD 1,72 BILLION)



65,90%
US



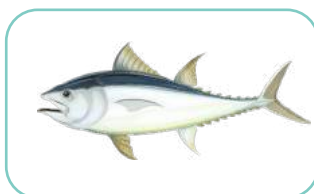
4,72%
EU



1,76%
ASEAN



3,33%
CHINA



TUNA
(USD 747,54 MILLION)



31,43%
US



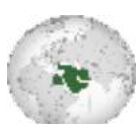
19,19%
JAPAN



15,36%
ASEAN



12,78%
EU



12,03%
MIDDLE EAST



CHEPALOPODS
(USD 556,29 MILLION)



41,34%
CHINA



23,30%
ASEAN



11,69%
EU



8,19%
TAIWAN



5,02%
US



CRABS
(USD 393,50 MILLION)



71,83%
US



8,65%
JAPAN



7,17%
CHINA



5,40%
ASEAN



3,96%
EU



SEAWEED
(USD 324,85 MILLION)



70,07%
CHINA



9,95%
EU



4,81%
US



3,13%
SOUTH KOREA



3,17%
ASEAN

STRATEGIES TO ACCELERATE EXPORT ACHIEVEMENT

1. Accelerating the process of issuing permits for fishing and fish carrier vessels;
2. Business expansion and increased production of shrimp farming;
3. Bilateral and multilateral trade negotiations in order to decrease TBM of main exported products to zero percent;
4. Accelerating the implementation of the compliance with the export requirements of export destination countries (Catch Certification, Marine Mammals Protection Act, etc.)
5. Providing facilities to exporters to be able to export to meet the requirements of export destination countries;
6. Participate in international exhibitions and brand promotions (safe & sustainable: Indonesia Seafood Naturally Diverse);
7. Organizing the Marine and Fisheries Business and Investment Forum (MFBF)
8. Conducting market intelligence collaboration with the agencies (government and non-government) to obtain market information and data of actual export destinations.

STRENGTHENING OF PROMOTION TO GLOBAL MARKET

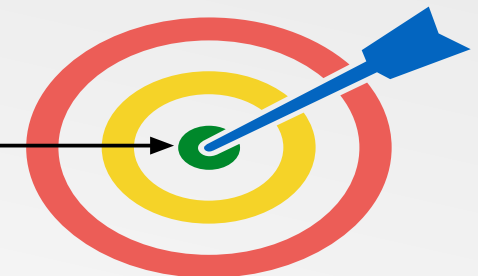


SUPPORTING ACTIVITIES



Target of potential trade contract (USD Billion)

2020	2021	2022	2023	2024
250	275	300	325	350



Business Meeting Facilitation

Business Meeting



SENA 2019

One-on-One Meeting



Interzoo 2018



SENA 2019



SEG 2019

Strengthening of MMAF Competency in Trade Promotion In Collaboration with Swisscontact (2018 -2020)



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation



B2B matchmaking during SEG 2018, SEAFEX 2018 & SEG 2019



Preparation of Co-exhibitor flyer
In SEG 2018



Pre-workshop for SEG 2018 Participants



Inbound & outbound sales during SEG 2019



Business networking with BSO
other countries In SEG 2019

Strengthening Trade Capacity and Export Supported by UNIDO - SECO (2014 – May 2019)



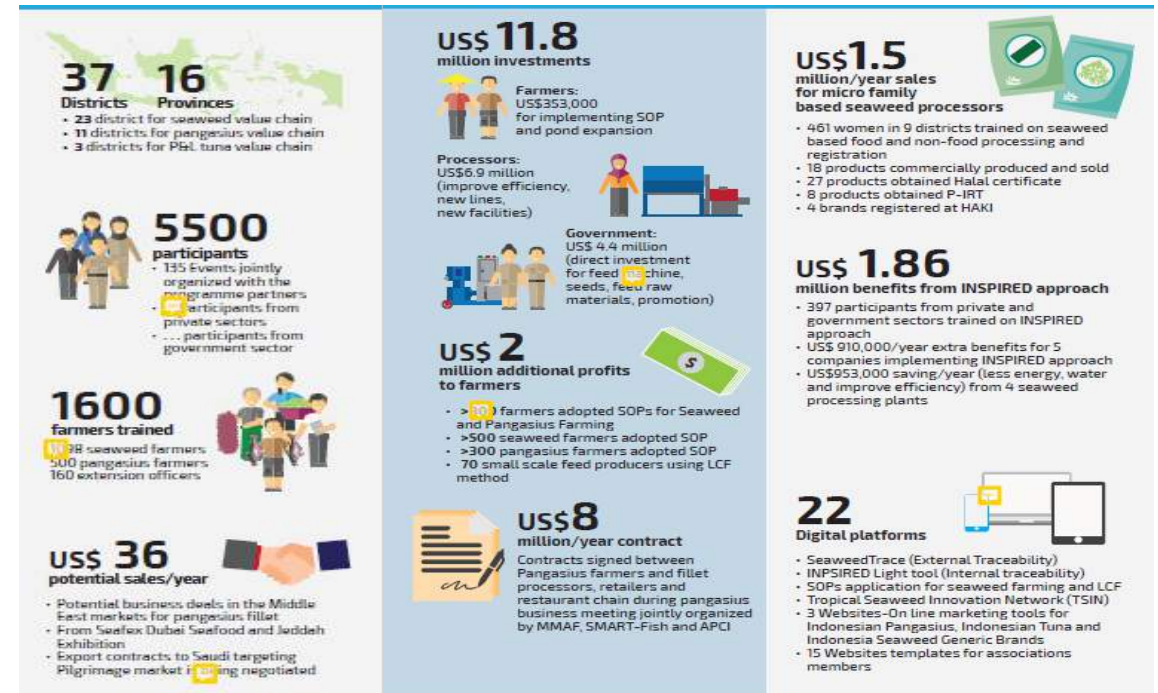
Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation



COMPONENTS:

- ☐ Public private dialogues,
- ☐ Strengthen local business support services – ipride4fish
- ☐ Educational programme productivity & innovation,
- ☐ Traceability systems,
- ☐ Sustainability certification,
- ☐ Trade Promotion



Generic Brands Development Supported by UNIDO - SECO



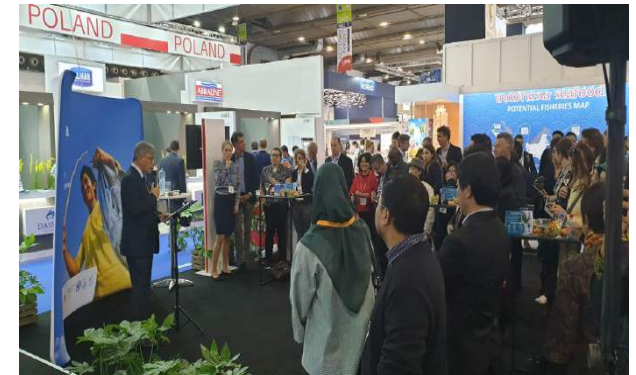
Brand launching



SIAL Interfood 2018, Jakarta



SEAFEX 2018, Dubai



SEG 2019, Brussels

Strengthening of Seaweed Industry as Natural Ingredients in Collaboration with CBI Netherlands (2019 – 2023)



CBI
Ministry of Foreign Affairs

Capacity building in arranging business matchmaking
Seaweed extract product for supplement & cosmetic in EU Market

Facilitating MMAF staff joining Study Tour
to Food Ingredients Europe (FIE) Trade Fair,
1 – 7 December 2019 di Paris & Den Haag



Promoting Indonesian Tuna Indonesia in Collaboration with IPNLF (2016 – 2019)



Networking Reception
in SEG 2016



Networking Reception
in SEG 2019



Launching generic brand Indonesian Tuna
in SEG 2019

Promoting a Sustainable Indonesian Tuna, Large Pelagic Fish and BSC in Collaboration with Sustainable Fisheries Partnership/SFP (2014 – 2019)



Policy and management improvement towards sustainable Tuna, Large Pelagic and BSC Fisheries



Indonesian Tuna & Large Pelagic Stakeholders Meeting in SENA 2015



MMAF, Indonesia BRC Association, and NFI meeting in SENA 2018

RESPONSIBLE MARKETING : SAFE AND SUSTAINABLE

- ❖ From "end product inspection" to "in-process inspection"
- ❖ All conformity to HACCP, and other International Quality Standards : GAP, GHdP, Good Distribution Practices (GDP), GMP and NRCP
- ❖ Seafood as its best
 - safe from farm to fork, from vessel to table
 - traceable and sustainable

Strengthening Standard and Quality Supported by UNIDO - SECO (2019 – 2022)



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation



Phase II

OUTPUTS:

1. Enhancing the national quality infrastructure institutions and services for fisheries
2. Improving compliance capacity of SMEs
3. Enhancing quality awareness reflected in conducive policies

OBJECTIVES:

Market access for SMEs both domestically and internationally is facilitated as a result of strengthened and proven compliance capacity in quality and standards in the fisheries sector

VALUE CHAINS :

Seaweed, shrimp, milkfish, tilapia, pangasius, and catfish

Facilitation on Sustainable Seafood



1. Facilitate better communication amongst stakeholders in the process of eco-labelling certification.
2. Eco-labelling certification process of blue swimming crab, grouper, snapper, big eye, skipjack, big eye and yellow-fin and mud crab.
3. Supporting Fisheries Improvement Programs to acquire full-assessment for eco-labelling certification of blue swimming crab, large tuna, large pelagic, snapper and grouper.
4. Collaborate with i.e. SFP, MDPI, MSC, WWF to facilitate eco-labelling.

RESPONSIBLE MARKETING : TRACEABLE

Why We Need To Develop National Traceability and Fish Stock System

EXTERNAL

EU Catch Certificate



US SIMP



INTERNAL

Fish Stock Balance Sheet



TRACEABILITY & FOOD SAFETY



EU CATCH CERTIFICATE

EC Regulation No.1005 / 2008 on September 19, 2008, requirements of export of fishery products to the European Union to prevent, reduce, and eradicate IUU Fishing



US. Seafood Import Monitoring Program US

This regulation sets out requirements for importers related to licensing, reporting and data recordkeeping for the import of fish and at-risk species to be free from IUU Fishing and seafood fraud.



FISH STOCK BALANCE SHEET

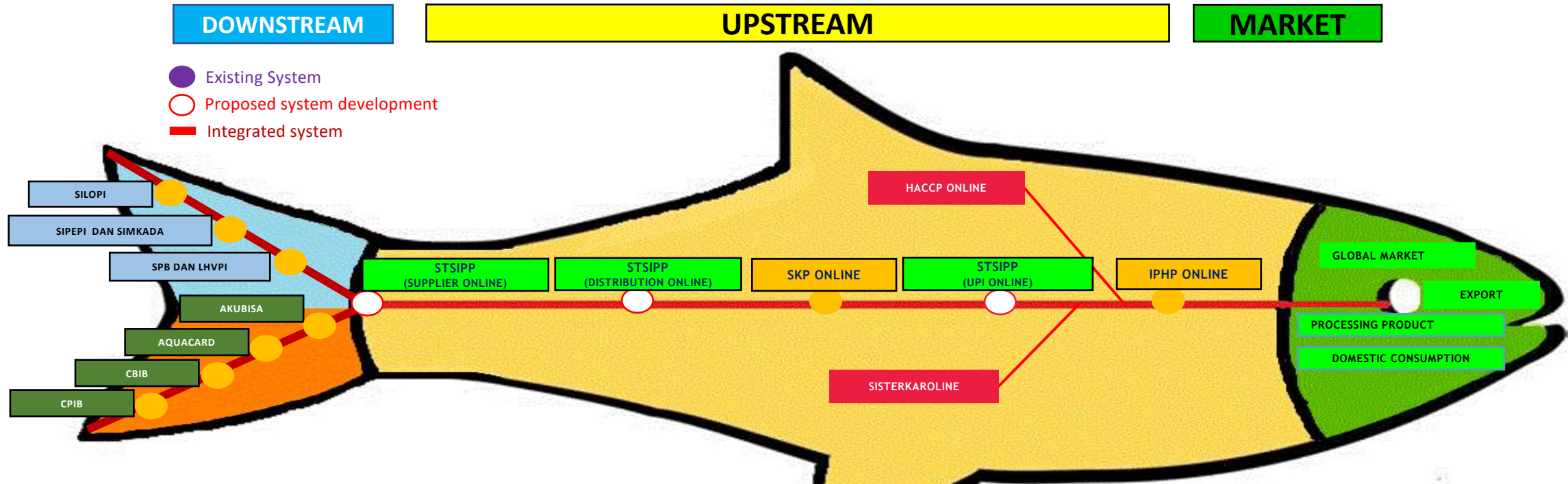
To integrate the data from downstream-upstream industry in a single national data system, in order to support decision making process.



TRACEABILITY AND FOOD SAFETY

Food safe assurance and traceability are the leverage factors to improve the competitiveness of Indonesian fish commodity and fish product in the global market.

Integration System in The Ministry of Marine Affairs and Fisheries



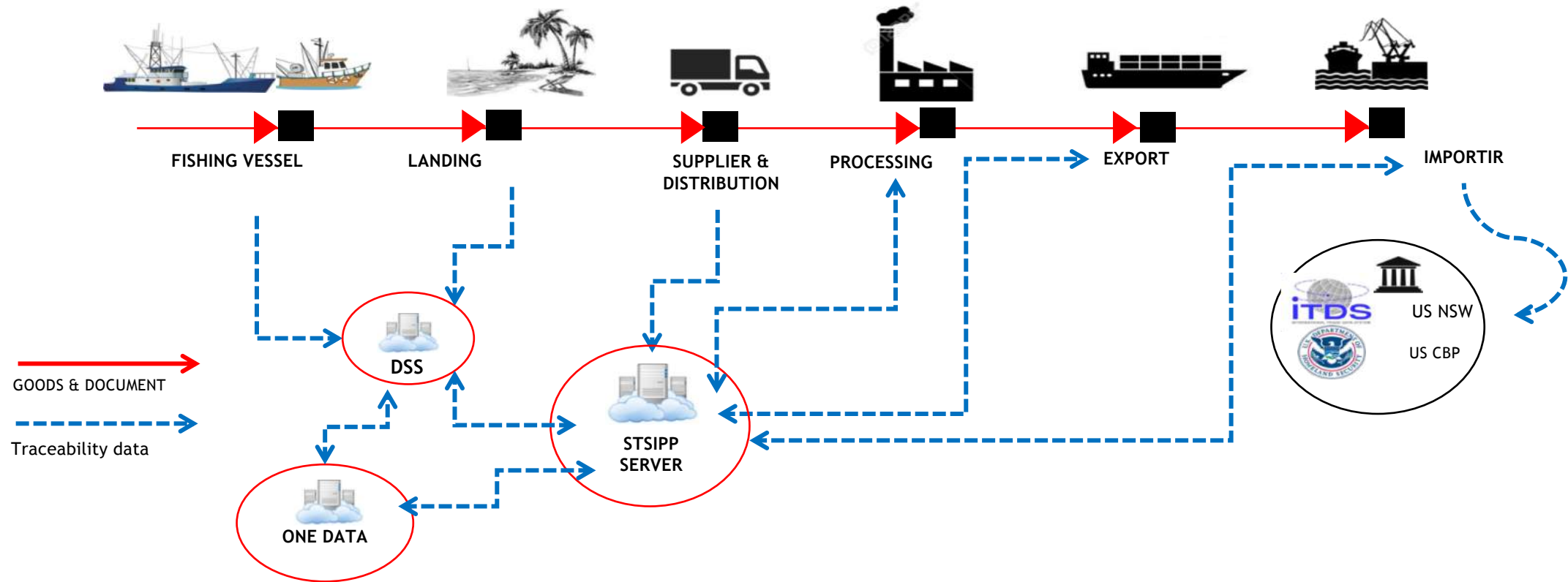
Remarks:

1. SILOPI -- Sistem Informasi Logbook Penangkapan Ikan (Logbook system)
2. SIPEPI -- Sistem Informasi Perizinan Penangkapan Ikan (Fishing Licensing system)
3. SIMKADA -- Sistem Informasi Kapal Izin Daerah (Local Administration Fishing Licensing System)
4. SPB -- Sistem Informasi Ijin Berlayar (Sail Permitted System)
5. LHVPI -- Sistem Informasi Verifikasi Hasil Tangkapan Ikan (Verification Catch System)
6. CPIB -- -- Sistem Informasi Sertifikasi Cara Pembenihan Ikan yang Baik (Broodstock System)
7. CBIB -- -- Sistem Informasi Sertifikasi Cara Budidaya Ikan yang Baik (GAP System)
8. AKUBISA -- sistem perizinan online untuk kegiatan usaha perikanan budidaya (Aquaculture Licensing System)

9. SISTERKAROLINE -- Sistem Karantina Ikan(Quarantine System)
10. HACCP ONLINE -- Sistem Sertifikasi Keamanan Mutu (HACCP system)
11. SKP ONLINE -- Sistem Informasi Sertifikasi Kelayakan Pengolahan Ikan (GMP System)
12. IPHP ONLINE -- Sistem Informasi Impor Hasil Perikanan (Import Licensing System)

STELINA

National Fish Traceability System as Backbone Integrated System Data and Information



- ❑ STELINA connects all information of supply chain and traceability of fish commodity and fishery products from upstream to downstream through data sharing system (DSS)
- ❑ Function :1) to ensure traceability, quality and safety of fish product, 2) to ensure the availability of national fish balance sheet accurately and timely 3) to provide the guaranty of exported fish and fish product



THANK YOU

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8 July 2020