

DIVERSIFICATION & ADAPTATION  
STRATEGY FOR INCREASING  
INDONESIAN EXPORT ON SEAFOOD  
TO THE EU AND GLOBAL MARKETS

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# GLOBAL SEAFOOD MARKET FORECAST

The seafood market size was valued at **USD 159.31 billion** in 2019, and is **projected to reach USD 193.91 billion by 2027**, registering a CAGR/Trend of **2.5% from 2020 to 2027**.

The fish segment was the highest contributor to the market, with USD 101.53 billion in 2019, and is estimated to reach USD 125.91 billion by 2027, at a CAGR/Trend of 2.7% during the forecast period.

*(Allied Market Research)*

The global fish and seafood market is expected to grow from USD 146.78 billion in 2018 to USD 206.89 billion by 2026 at a CAGR of 9.3% during the forecast period from 2019-2026.

*(Fior Markets)*

- ❖ Seafood is considered as an excellent source of essential fatty acids (healthy diet)
- ❖ Contains substantial amounts of protein, minerals, and vitamins.
- ❖ Growing demand of seafood through e-commerce is one of the driving factor, fuelling the growth of market
- ❖ Rise in population plus a large number of people who consume fish



# FIGURES: GLOBAL FISHERIES TRADE



## 5 BIG GLOBAL DEMAND FOR FISHERIES PRODUCT 2019



030617 (Frozen Shrimp and Prawns) – USD 17.97 Billion (13.52%)



030214 (Fresh or Chilled Atlantic Salmon) - USD 12.78 (9.62%)



030743 (Cuttle fish and squid, frozen) - USD 5.56 ( 4.18%)



030441 (Fresh or chilled fillets of Pacific salmon) - USD 4.02 (3.03%)



030389 (Frozen fish) – USD 3.68 (2.77%)

**Global Demand Fisheries Product trend increased 6.28 % from 2015-2019**



## 5 BIG GLOBAL SUPPLY FOR FISHERIES PRODUCT 2019



030617 (Frozen Shrimp and Prawns) – USD 17.41 Billion (13.26%)



030214 (Fresh or Chilled Atlantic Salmon) - USD 13.65 ( 10.39%)



030743 (Cuttle fish and squid, frozen) - USD 6.31 (4.80%)



030389 (Frozen fish) - USD 4.12 (3.14%)



030441 (Fresh or chilled fillets of Pacific salmon) - USD 3.78 (2.88%)

**Global Supply Fisheries Product trend increased 5.28 % from 2015-2019**



## 5 BIG GLOBAL EXPORTING COUNTRIES FOR FISHERIES PRODUCT 2019



1. China USD 14.57 Billion (11.06%)



2. Norway USD 11.68 Billion (8.86%)



3. India USD 7.03 Billion (5.34%)



4. Chile USD 5.98 Billion (4.54%)



5. Vietnam USD 5.66 Billion (4.29%)



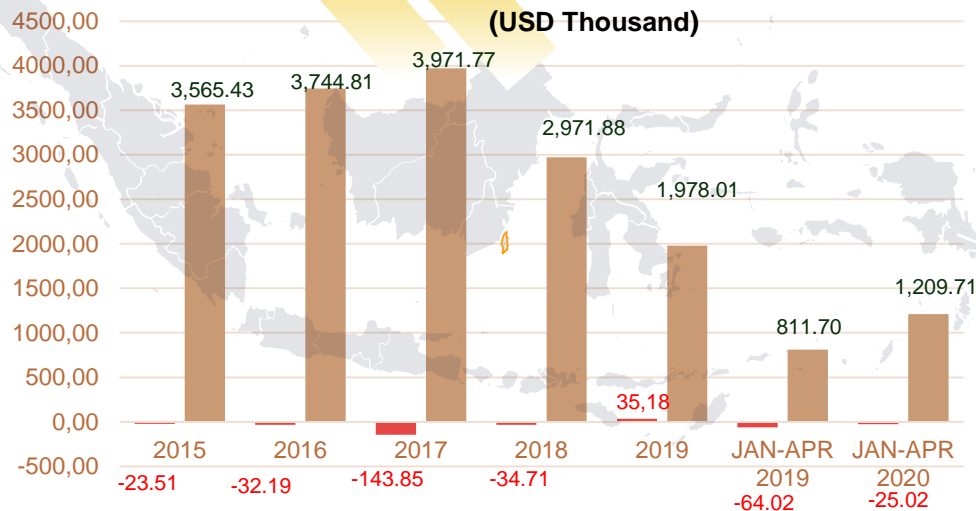
13. Indonesia USD 3.64 Billion (2.77%)



# FIGURES: INDONESIA – EU TRADE 2020

## Balance Of Trade Indonesia – EU

(USD Thousand)



■ Oil and Gas ■ Non Oil and Gas



- Jan – Apr 2020, **surplus USD 1.18 billion**
- From:
  - ✓ Non Oil Gas Surplus : USD 1.21 billion
  - ✓ Oil and gas Defisit : USD 25.01 million



Indonesia export of non-oil & gas product to EU is USD 4.95 billion in period Jan – Apr 2020 (**increased 1.81%**) compared same period 2019

## Main export products (Jan – Apr 2020)

1. CPO and Derivatives USD 959.03 million (19.38%)
  2. Footwear USD 544.30 million (11.00%)
  3. Textile product USD 462.77 million (9.35%)
  4. Electronics USD 415.89 million (8.40%)
  5. Chemicals USD 400.27 million (8.09%)
21. Molluscs, Shrimp, Fish Processed & Fish  
USD 55.72 million (1.13%)

## Main export destination (Jan – Apr 2020)







- Netherlands USD 1.04 billion (20.99%)
- Germany USD 821.66 million (16.60%)
- Italy USD 633.01 million (12.79%)
- Spain USD 565.21 million (11.42%)
- Belgium USD 441.89 million (8.93%)



# FIGURES: EU FISHERIES TRADE

## EU Import of Fisheries from Main Countries (2019)

EU Import of Fisheries Product from World was USD 47.80 Billion

1.  Norway - USD 9.08 billion (share 18.98%)
  2.  Spain - USD 2.79 billion (share 5.85%)
  3.  China - USD 2.55 billion (share 5.34%)
  4.  Netherlands - USD 2.28 billion (share 4.77%)
  5.  Sweden - USD 2.16 billion (share 4.51%)
37.  Indonesia - USD 224.95 million (share 0.47%)

## EU Export of Fisheries to Main Countries (2019)

1.  France - USD 3.75 billion (share 12.40%)
  2.  Italy - USD 3.36 billion (share 11.10%)
  3.  Germany - USD 3.35 billion (share 11.09%)
  4.  Spain - USD 2.65 billion (share 8.77%)
  5.  Netherlands - USD 1.51 billion (share 4.99%)
64.  Indonesia - USD 30.83 million (share 0.10%)

Source:  
Ministry of Trade, 2020



# FIGURES: INDONESIA – EU ON FISHERIES TRADE

## Indonesia-EU Fisheries Trade Figures Jan –Apr 2020

Source: Ministry of Trade, 2020

• **USD 67.38 MILLION**  
or decreased 4.18 %  
Compared to 2019  
(USD 70.31 Million)

  
**INDONESIA EXPORT OF FISHERIES TO EU**

**INDONESIA IMPORT OF FISHERIES FROM EU**







• **USD 2.7 MILLION**  
or decreased by 49.6%  
compared year 2019  
(USD 1.84 Million)



1. Italy USD 16.56 Million (24.57%)
2. Netherlands USD 9.83 Million (14.6%)
3. France USD 8.15 Million (12.1%)
4. UK USD 7.00 Million (10.40%)
5. Spain USD 6.17 Million (9.16%)

**5**  
**INDONESIA MAIN EXPORT TO EU**

**5**  
**INDONESIA MAIN EXPORT PRODUCTS TO EU**

- 1  Crustaceans; Frozen Shrimps and Prawns USD 13.73 Million (20.37%)
- 2  Molluscs, Octopus USD 11.52 million (17.11%)
- 3  Mucilages and Thickeners, USD 78.69 million (2.23%)
- 4  Cuttle Fish and Squid, USD 5.81 million (8.71%)
- 5  Fish Fillets, USD 4.37 million (6.49%)



# REQUIREMENT FOR IMPORT ON FISH AND SEAFOOD TO EU MARKETS

## Mandatory

- Country and processing facilities need to be accredited
- Maximum residue levels must not be exceeded
- Labelling regulations must be strictly followed
- Prove that your fish and seafood come from legal sources; from farm/sea to table
- A new system for country of origin certificates (REX System)

## Additional

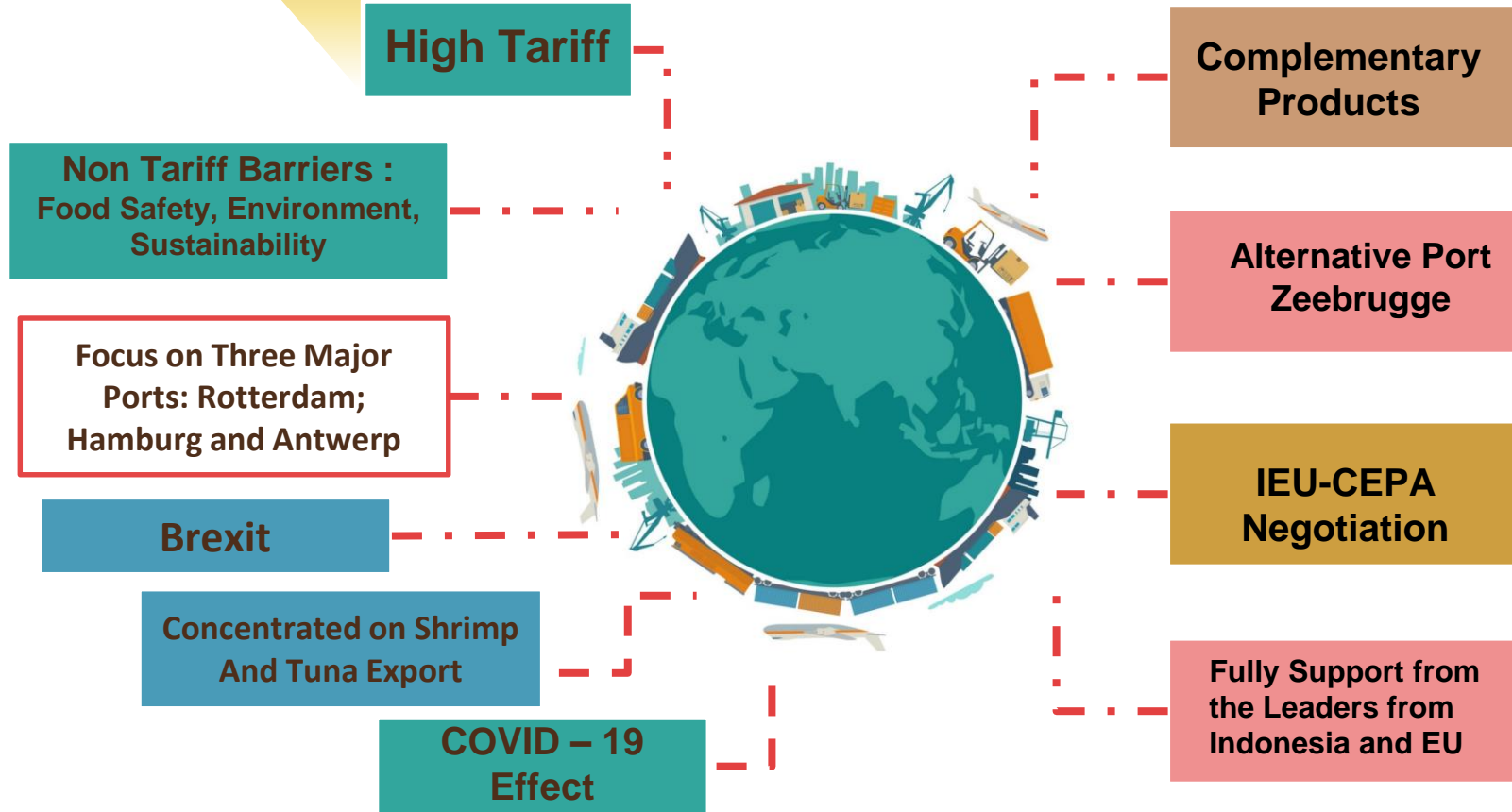
- Food Safety Certification
- Social compliance certification
- Sustainability certification

## Niche markets

- Increased traceability demands in wild and aquaculture and seafood supply chains
- The organic seafood market requires organic certification



# ISSUES AND CHALLENGES





# STRATEGY TO DRIVE TRADE INDONESIA TO EU + OTHERS EUROPEAN

-  1. Indonesia – EU CEPA Negotiation.
-  2. Non Tariff Barriers : Food Safety; Sustainability; Traceability and IUUF.
-  3. Increase Promotion/Business Matching (Offline and Online).
-  4. Product and Market Diversification.
-  5. Development on Indonesian Export Products: design; branding; certification.
-  6. Optimization E-Commerce.
-  7. Fasten Transportation and Distribution Channel to Optimize Port of Export Destination.
-  8. Export and Import Relaxation..
-  9. Trade Facilitation.
-  10. COO online, comply EU REX System.
-  11. Push ASEAN-EU FTA.



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**THANK YOU**



# POTENTIAL EXPORT FISHERIES PRODUCTS

## Fish Fillets; Frozen, Tilapias (oreochromis Spp.)

**HS Code 030461**

In 2019, Indonesia's exports represent **18.11%** of world exports for tilapias, its ranking in world exports is **2**

### Main origin countries (2019)

- 1.China USD 235.47 million (share 65.28%)
- 2.Indonesia USD 65.34 million (USD 18.11%)**
- 3.Taipei USD 19.79 million (5.49%)
- 4.Netherlands USD 11.92 million (USD 3.30%)
- 5.United States of America USD 5.94 million (1.65%)

### Indonesia's Main Export Destinations (2019)

- 1.United States of America USD 47.72 million (share 49.98%)
- 2.Netherlands USD 5.13 million (25.11%)
- 3.Canada USD 2.87 million (10.18%)
- 4.Germany USD .,34 million (3.86%)
- 5.Other European countries USD 6 million(1.40%)



## Cuttle fish and squid; frozen

**HS Code 030743**

In 2019, Indonesia's exports represent **6.31%** of world exports for cuttle fish & squid, its ranking in world exports is **4**

### Main origin countries (2019)

1. China USD 2.00 billion (share 32.08%)
2. India USD 605.18 million (USD 9.67%)
3. Peru USD 576.80 million (9.22%)
- 4. Indonesia USD 433.23 million (USD 6.92%)**
5. Spain USD 394.90 million (6.31%)

### Indonesia's Main Export Destinations (2019)

1. China USD 216.52 million (share 49.98%)
2. Vietnam USD 3.50 million (25.11%)
3. Taipei USD 108.78 million (10.18%)
4. Italy USD 44.12 million (3.86%)
5. Other European countries USD 6 million(1.40%)





# POTENTIAL EXPORT FISHERIES PRODUCTS

## Molluscs; Octopus (octopus Spp.), Frozen HS Code 030752

In 2019, Indonesia's exports represent 6.85% of world exports for octopus, its ranking in world exports is 5

### Main origin countries (2019)

1. Morocco USD 432.77 million (share 28.63%)
2. Spain USD 297.46 million (USD 19.68%)
3. Vietnam USD 247.08 million (16.34%)
4. China USD 137.83 million (USD 9.12%)
5. **Indonesia USD 103,57 million (6.85%)**

### Indonesia's Main Export Destinations (2019)

1. Italy USD 23.85 million (share 23.03%)
2. United States of America USD 21.90 million (21.15%)
3. Japan USD 12.14 million (11.73%)
4. China USD 8.86 million (8.55%)
5. Other European countries USD 19,24 mio (18.58%)



## Frozen catfish "Pangasius spp., Silurus spp., Clarias spp., Ictalurus spp." HS Code 030324

In 2019, Indonesia's exports represent 3.65% of world exports for cuttle fish & squid, its ranking in world exports is 4

### Main origin countries (2019)

1. Vietnam USD 99.09 million (share 66.75%)
2. Myanmar USD 13.82 million (USD 9.31%)
3. China USD 11.36 million (7.65%)
4. **Indonesia USD 5.42 million (USD 3.65%)**
5. Netherlands USD 3.07 million (2.07%)

### Indonesia's Main Export Destinations (2019)

1. Thailand USD 3.38 million (share 62.31%)
2. Republic of Korea USD 553,000 (10.20%)
3. France USD 108.78 million (7.07%)
4. Belgium USD 383,000 (5.65%)
5. Other European countries USD 191,000 (3.52%)





# Speakers

- **Ms. Joelyn Sentina**, Trade Promotion Officer, Infofish, Malaysia
- **Prof. Dr. Ahmad Sulaeman**, Secretary General, Indonesian Society of Food and Nutrition (Pergizi Pangan), Indonesia
- **Dr. Paulo Morgado**, MorGroup, The Netherlands
- **Mr. Olivier Hottlet**, Owner, Hottlet Frozen Foods NV, Chairman of Frucom and Belgafood, Belgium