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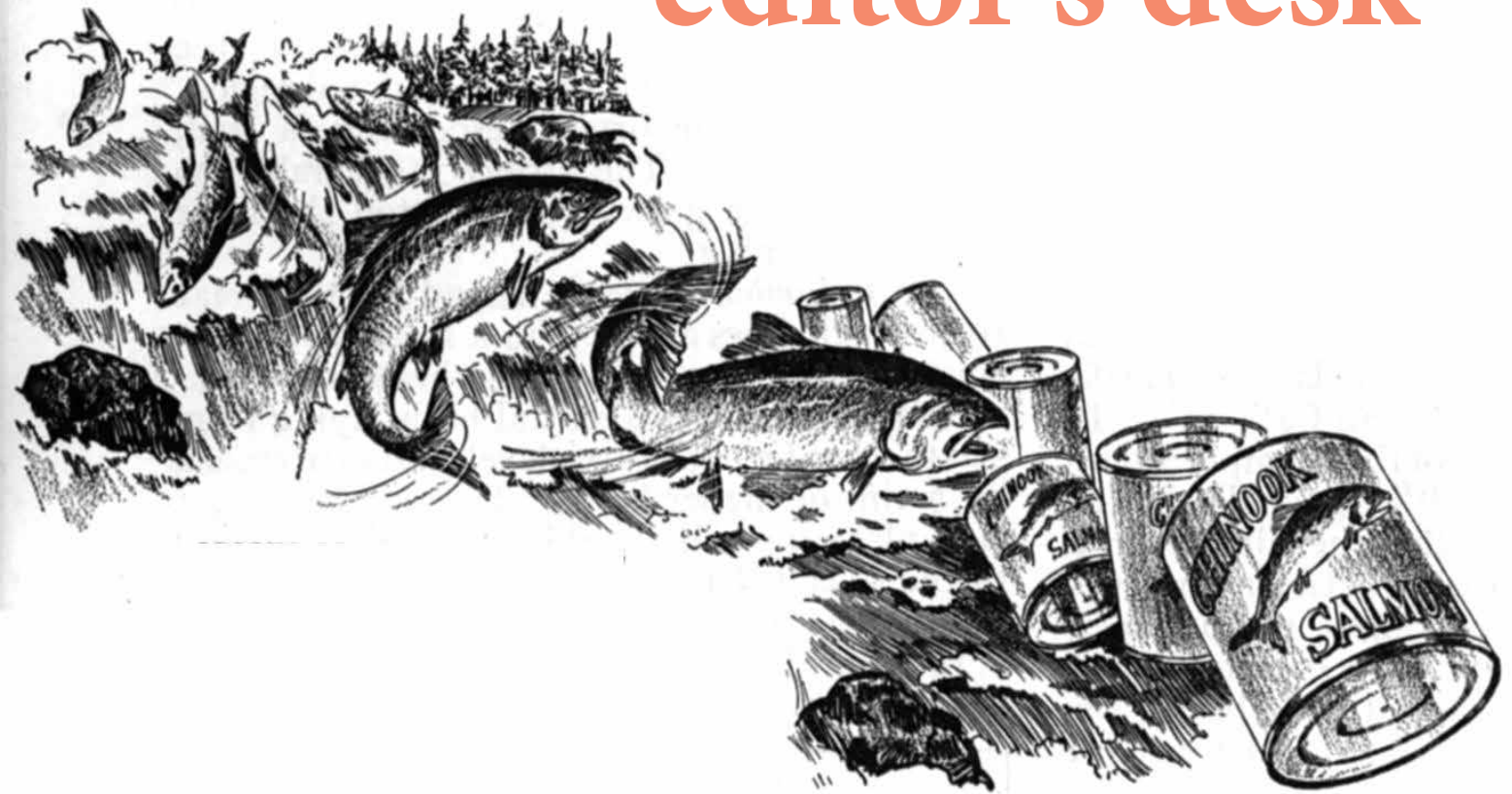
Frozen Marine Products



WHAT'S INSIDE

Based on the area of waters, Indonesia has abundant potential fishery products both capture fisheries and aquaculture. Indonesia can become one of the countries that can dominate the world's number one fishing business.

editor's desk



Dear valuable readers,

As an archipelagic country, Indonesia has considerable potential in fisheries sector, It has an area of waters reaching 5.8 million km² or equal to 2/3 of the total area of Indonesia. Based on the area of waters, Indonesia has abundant potential fishery products both capture fisheries and aquaculture.

Indonesian fisheries development is an economic activity that has an increasingly good prospect, especially in increasing the country's foreign exchange earnings through fisheries product exports. Thus, Indonesia can become one of the countries that can dominate the world's number one fishing business.

Thank You

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Promotion Center (ITPC)



HOT ISSUE

*Frozen
Marine Products*



The SIMP (Seafood Import Monitoring Program) fish export regulation has been implemented by the United States on January 1, 2018. This regulation requires the import of marine and fishery products entering the United States market in order to maintain the traceability of seafood products from the countries of origin.

The SIMP scheme proposed by the National Oceanic and Atmospheric Administration (NOAA) basically regulates three main things:

1. Classifying at-risk species, namely 17 species which have been recorded as the result of Illegal Unreported Unregulated Fishing (IUUF);
2. Implementation of traceability obligations and capture certificates for at-risk fisheries and aquaculture products;
3. Provision of supply chain information starting from ships, fishing / cultivation locations, fishing gear, transportation, processing, to export processes.

The application of SIMP, especially for shrimp product groups, is feared to have a significant impact and can cause losses for the Indonesian shrimp product industry. This is due to the fact that most Indonesian fisheries exporters are fishermen and small fish farmers. It will bring difficulty for Indonesian fisheries exporters when the United States wishes to implement the regulation.

On the other hand, SIMP regulation must be observed carefully because the United States is the main destination for Indonesia's national fisheries exports. There are three specific reasons, why this regulation is important to be observed by all parties, first, the majority

(84%) of Indonesian fish and fish product exports are grouped into the at-risk species group; second, the traceability obligation and capture certification for at-risk of this species are only applied to the exporting country, while the local business of the United States are exempt from this obligation; and the third is supply chain data starting from the port of delivery to the port of destination.

The Indonesian government through the Ministry of Maritime and Fisheries Affairs has provided support for Indonesian fisheries exporters by issuing a Letter of the Director General of Strengthening Competitiveness of Marine and Fishery Products Number: 9065 / DJPDS / TU.210 / XII / 2017, regarding Guidelines for Filling Form U.S. The Seafood Import Monitoring Program, which is expected to provide easy access to information in fulfilling SIMP regulations. The Ministry of Maritime and Fisheries Affairs has established a help desk or consultation service that can be contacted by Indonesian fisheries exporters related to the implementation of the SIMP.

Meanwhile the Ministry of Trade has conducted a series of socialization activities, to disseminate SIMP regulations so Indonesian fisheries exporters can immediately adjust their products to the intended regulations. In addition, the Ministry of Trade will actively keep abreast of further developments related to the enactment of this SIMP rule, and will participate in various stages of drafting regulations and negotiations so it will not disrupt the performance of national fisheries exports.





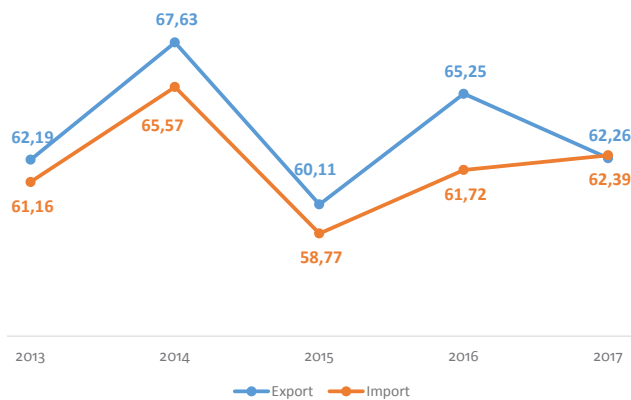
MARKET REVIEW

Indonesian Frozen Fishery Products Trade Performance

Based on data from the UN Comtrade and ITC Statistics, the performance of the world's frozen fishery products trade shows a negative trend of 0.27% within last 5 years (2013-2017).

On the export side in 2013, the value was recorded at US \$ 62.19 billion with a negative trend of 0.33% where in 2017 the value reached US \$ 62.26 billion. Whereas in terms of imports, the demand for frozen world fishery products experienced a negative trend of 0.21% within last 5 years (2013 - 2017). Although the trend shows a negative number, an increase in demand in 2017 amounted to US \$ 675.84 million or an increase of 1.10%.

World Export & Import of Frozen Fishery Products (2013-2017, in US\$ billion)



Source : ITC (UN Comtrade, 2018)

In 2017, the world main supplier for frozen fishery products is China with export value of US \$ 8.28 billion, followed by India with a value of US \$ 5.96 billion and Vietnam with a value of US \$ 4.24 billion.

Whereas the main importing country for frozen fishery products is the United States with an import value of US \$ 11.08 billion, followed by Japan with a value of US \$ 7.38 billion and Vietnam with a value of US \$ 5.00 billion. Indonesia is ranked 38th with an import value of US \$ 0.20 billion.

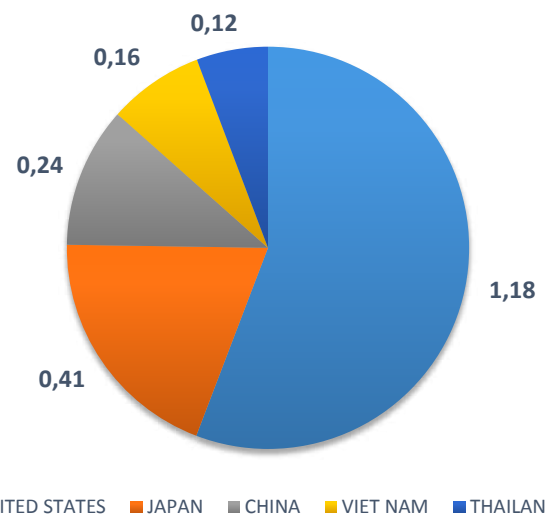
Herewith the classification of frozen fishery products, based on the 6 Digit Harmonized System:

No.	HS6	DESCRIPTION
1	030613	Shrimps And Prawns, Including In Shell, Cooked By Steaming Or By Boiling In Water, Frozen
2	030379	Fish, Nesoi, Excluding Fillets, Livers And Roes, Frozen
3	030429	Fish Fillets&Other Fish Meat (Excl. Of 0304.21-0304.92, Whether/Not Minced), Frozen Fillets
4	030749	Cuttle Fish And Squid, Frozen, Dried, Salted Or In Brine
5	030343	Skipjack Or Stripe-Bellied Bonito Tunas, Excluding Fillets, Livers And Roes, Frozen
6	030759	Octopus, Frozen, Dried, Salted Or In Brine
7	030614	Crabs, Including In Shell, Cooked By Steaming Or By Boiling In Water, Frozen
8	030619	Crustaceans, Nesoi, Including In Shell, Cooked By Steaming Or By Boiling In Water, Frozen
9	030342	Yellowfin Tunas, (Thunnus Albacares), Excluding Fillets, Livers And Roes, Frozen
10	030799	Molluscs And Other Aquatic Invertebrates Nesoi, Frozen, Dried, Salted Or In Brine
11	030349	Tunas Nesoi, Excluding Fillets, Livers And Roes, Frozen
12	030421	Swordfish (Xiphias Gladius),Frozen Fillets
13	030341	Albacore Or Longfinned Tunas (Thunnus Alalunga), Excluding Fillets, Livers And Roes, Frozen
14	030361	Swordfish (Xiphias Gladius), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
15	030339	Flat Fish, Nesoi, Excluding Fillets, Livers And Roes, Frozen
16	030760	Snails, Other Than Sea Snails, Live, Fresh, Chilled, Frozen, Dried, Salted Or In Brine
17	030376	Eels (Anguilla Spp.), Excluding Fillets, Livers And Roes, Frozen
18	030329	Salmonidae Nesoi, Excluding Fillets, Livers And Roes, Frozen
19	030612	Lobsters (Homarus Spp.), Including In Shell, Cooked By Steaming Or By Boiling In Water, Frozen
20	030344	Bigeye Tunas (Thunnus Obesus), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
21	030611	Rock Lobster And Other Sea Crawfish (Palinurus Spp., Panulirus Spp., Jasus Spp.) Including In Shell, Cooked By Steaming Or By Boiling In Water, Frozen
22	030729	Scallops, Including Queen Scallops, Of The Genera Pecten, Chlamys Or Placopecten, Frozen, Dried, Salted Or In Brine
23	030374	Mackerel (Scomber Scombrus, Scomber Australasicus, Scomber Japonicus), Excluding Fillets, Livers And Roes, Frozen
24	030375	Dogfish And Other Sharks, Excluding Fillets, Livers And Roes, Frozen
25	030371	Sardines (Sardina Pilchardus, Sardinops Spp.) Sardinella (Sardinella Spp.), Brisling Or Sprats (Sprattus Sprattus) No Fillets, Livers Or Roes, Frozen
26	030710	Oysters, In The Shell Or Not, Live, Fresh, Chilled, Frozen, Dried, Salted Or In Brine
27	030380	Fish Livers And Roes, Frozen
28	030739	Mussels (Mytilus Spp., Perna Spp.), Frozen, Dried, Salted Or In Brine
29	030346	Southern Bluefin Tunas (Thunnus Maccoyii), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
30	030333	Sole (Solea Spp.), Excluding Fillets, Livers And Roes, Frozen
31	030362	Toothfish (Dissostichus Spp.),Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
32	030331	Halibut And Greenland Turbot (Reinhardtius Hippoglossoides, Hippoglossus Hippoglossus, Hippoglossus Stenolepis) Except Fillets, Livers Or Roes, Frozen
33	030319	Pacific Salmon (Oncorhynchus Gorbuscha/Keta/Tschawwyttscha/Kisutch/Masou/Rhodurus), Frozen (Excl. Of 0303.11; Excl. Fillets/Other Fish Meat Of 03.04/Liv
34	030378	Whiting (Merluccius Spp.) And Hake (Urophycis Spp.), Excluding Fillets, Livers And Roes, Frozen
35	030373	Atlantic Pollock (Pollachius Virens), Excluding Fillets, Livers And Roes, Frozen
36	030311	Sockeye Salmon (Red Salmon) (Oncorhynchus Nerka), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
37	030351	Herrings (Clupea Harengus, Clupea Pallasii), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)

No.	HS6	DESCRIPTION
38	030345	Bluefin Tunas (Thunnus Thynnus), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
39	030422	Toothfish (Dissostichus Spp.), Frozen Fillets
40	030332	Plaice (Pleuronectes Platessa), Excluding Fillets, Livers And Roes, Frozen
41	030352	Cod (Gadus Morhua, Gadus Ogac, Gadus Macrocephalus), Frozen (Excl. Fillets/Other Fish Meat Of 03.04/Livers & Roes)
42	030322	Atlantic Salmon (Salmo Salar) And Danube Salmon (Hucho Hucho), Excluding Fillets, Livers And Roes, Frozen
43	030321	Trout (Salmo Trutta, Salmo Gairdneri, Salmo Clarki, Salmo Aguabonita, Salmo Gilae), Excluding Fillets, Livers And Roes, Frozen
44	030377	Sea Bass (Dicentrarchus Labrax, Dicentrarchus Punctatus), Excluding Fillets, Livers And Roes, Frozen

Indonesian frozen fishery products have been exported to Asia, America, Europe and Australia. In 2017, the main export market for frozen Indonesian fishery products was the United States with a value of US \$ 1.18 billion with a 45.57% share followed by Japan with a value of US \$ 412.34 million with a share of 15.88%, China with the value of US \$ 239.81 million with a share of 9.23%, Vietnam with a value of US \$ 163.31 million with a share of 6.29% and Thailand with a value of US \$ 121.96 million with a share of 4.70%.

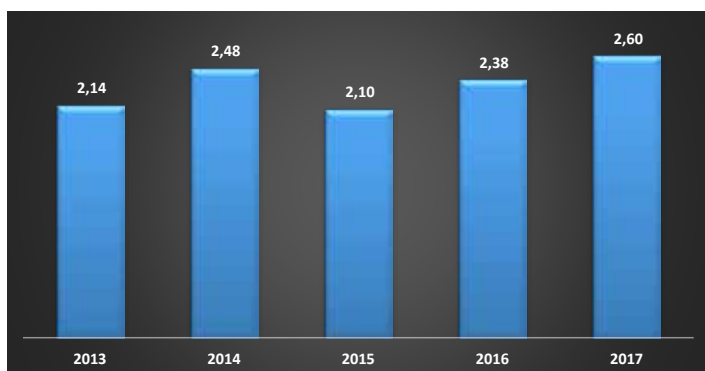
Indonesia to the World Main Markets of Frozen Fisheries Products 2017 (in US\$ billion)



Source : BPS (processed by Dit. P2IE, 2018)

The export value of Indonesia's frozen fishery products experienced a significant growth over the past 5 years (2013 - 2017), with a growth trend of 3.50%. In 2013, the export value reached US \$ 2.14 billion and continued to grow to US \$ 2.60 billion in 2017. In 2016-2017, frozen fishery products increased by 9.35% or raised up to US \$ 222.02 million from the original value of US \$ 2.37 billion.

Indonesia to the World Export of Frozen Fisheries Products 2013-2017 (in US\$ billion)



Source : BPS (processed by Dit. P2IE, 2018)





The Indonesian export of frozen fishery products in 2017 is dominated by Shrimps and Prawns, including in shells, cooked by steiling in water, frozen (HS 030613), with an export value of US \$ 1.42 Million and representing 54.82% of export value of frozen fishery products in Indonesia to the World.

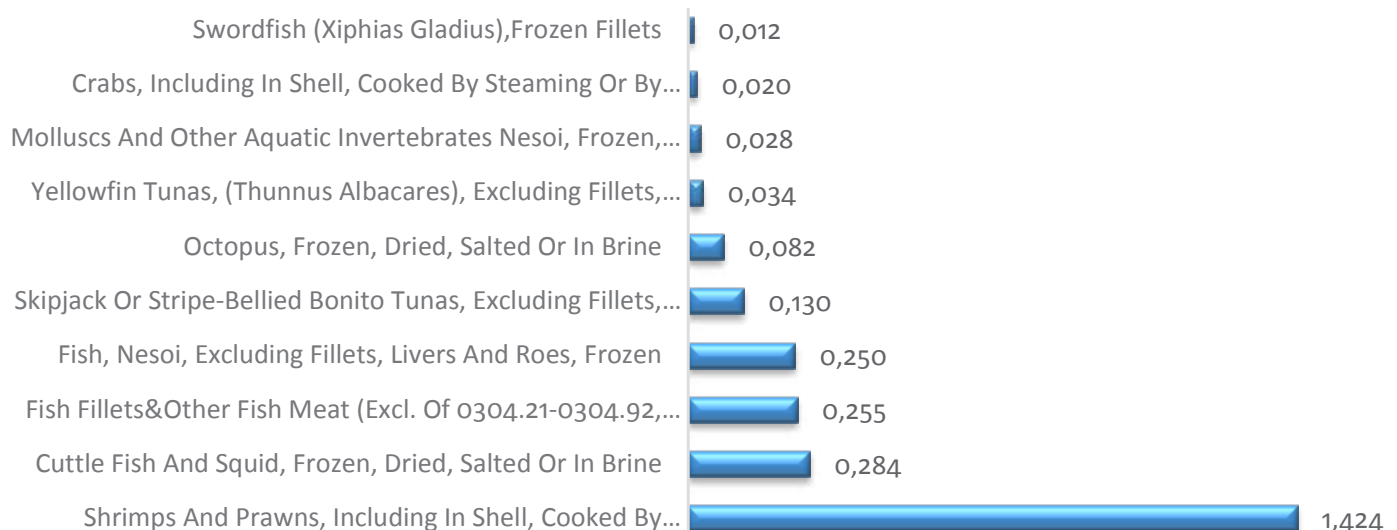
Indonesian frozen shrimp products are one of the best quality products and exported to the United States with a value of US \$ 973.23 million and Japan with a value of US \$ 301.23 million in 2017. Most of Indonesia's frozen shrimp products are 70% shrimp Vaname or white feet and followed by Windu Shrimp.

Another popular products are Cuttlefish and Squid, frozen, dried, salted or in brine (HS 030749), with an export value of US \$ 283.64 million and representing 10.92% of the total exports of frozen Indonesian fishery products to the World in 2017. This product was successfully

exported to China with an export value of US \$ 129.32 million market share of 45.59%, followed by Vietnam with export value of US \$ 48.79 million, market share of 17.20% and Taiwan with export value of US \$ 37, 24 million market share 13.13%.

Fish fillets & other fish meat (Exc. Of 0304.21-0304.92, whether / or not minced), frozen fillets (HS 030429) are Indonesian frozen fisheries products which popular in 2017, recorded an export value of US \$ 254.80 Million or representing 9.81% of the total exports of frozen fishery products in Indonesia to the World. The main market for Indonesian products is the United States with an export value of US \$ 148.72 million with a market share of 58.37%, followed by Japan with an export value of US \$ 31.44 million with a market share of 12.34% and the Netherlands with US export value \$ 8.76 Million with a market share of 3.44%.

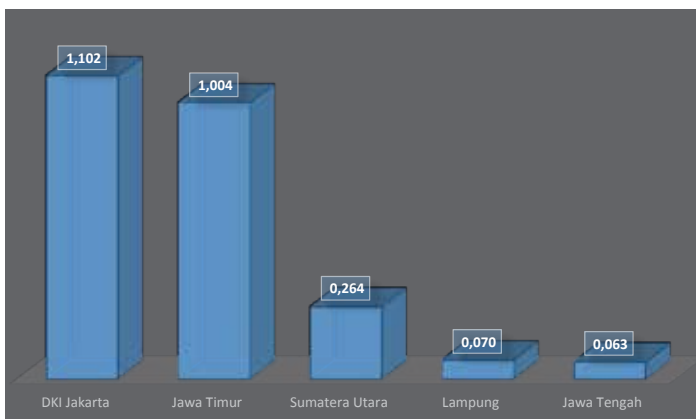
10 Main Indonesian Frozen Fisheries Products to the World 2017 (based on 6 Digits HS, in US\$ billion)



Source : ITC (UN Comtrade, 2018)

DKI Jakarta, East Java, North Sumatra, Lampung and Central Java are provinces in Indonesia that actively provide export value of frozen fishery products at the end of 2017. DKI Jakarta it exported US \$ 1.10 billion that year, followed by East Java with export value of US \$ 1.00 Billion, North Sumatra with a value of US \$ 263.68 Million, Lampung with a value of US \$ 70.23 Million and Central Java with a value of US \$ 63.12 Million.

Indonesian Export of Frozen Fishery Products in 2017 (Based on Province, in US\$ billion)



Source : BPS (processed by Dit. P2IE, 2018)

As previously stated, Vaname Shrimp or White Feet represents almost 70% of Indonesian fish farming. It can be seen from the results of BPS statistics which show that Shrimps and Prawns, including in shell, cooked by steaming in water, frozen (HS 030613) is the main frozen fishery product exported by the 5 provinces.

For vaname or white foot shrimp products, 5 provinces that have the largest production centers in 2015 include (1) West Nusa Tenggara precisely in the Regency / City of Sumbawa with a total production of 84,033.12 tons; (2) East Java precisely located in the Regency / City of Banyuwangi with a total production of 12,773.16 tons; (3) West Java precisely located in the Regency / City of Indramayu with a total production of 47,632.50 tons; (4) Lampung is precisely located in the District / City of Tulang Bawang with a total production of 15,165.00 tons; and (5) South Sumatra Ogan Komering Ilir with total production of 42,330.80 tons. That is why vaname shrimp is ranked first as a superior product of Indonesian exports.

Other superior frozen fishery products that have been successfully exported by DKI Jakarta, East Java, North Sumatra, Lampung and Central Java in 2017:

- 1) DKI Jakarta exports products of Cuttlefish and Squid, Frozen, Dried, Salted or in Brine (HS 030749), with an export value of US \$ 186.91 Million;
- 2) East Java Province is recorded as exporting for Fish Fillets & Other Fish Meat products (Exc. Of 0304.21-0304.92, whether / not minced), frozen fillets (HS 030429), with a value of US \$ 86.82 Million;

- 3) North Sumatra Province is recorded as exporting for Fish Fillets & Other Fish Meat products (Exc. Of 0304.21-0304.92, whether / not minced), frozen fillets (HS 030429), with a value of US \$ 10.18 Million;
- 4) Lampung Province is registered to export Crabs products, including in shells, cooked by steaming in water, frozen (HS 030614), with a value of US \$ 1.61 Million;
- 5) Central Java Province is registered to export Fish products, Nesoi, Excluding Fillets, livers and roes, frozen (HS 030379), with a value of US \$ 12.42 Million.

As an archipelagic country with a variety of marine biota makes Indonesia one of the countries that has a large fishery potential is not surprising if the fisheries sector becomes a leading industry. The commitment of the Indonesian Government in supporting the fisheries sector is proven through optimizing infrastructure, protecting the economic zone and implementing the eradication of illegal fishing policies.

The Minister of Maritime and Fisheries Affairs, Susi Pudjiastuti said the policy of eradicating illegal fishing increases sustainable fish stocks or maximum sustainable yield in the Indonesian ocean. She also added, based on the results of the review of the National Fish Stock Assessment Committee, MSY Indonesia rose from 7.3 million tons in 2015 to 9.93 million tons in 2016. In addition, there was a decline in imports up to 70%. In 2016, the import quota used was only 20% of the quota provided.

From recognition by the European Union regarding Indonesia's success in managing fishery products by eradicating the practice of illegal fishing and the like. With the decline in import duty (ID) to the European Union, the Indonesian Government is optimistic that Indonesia has the potential to dominate the world market. This can be happen if the government succeeds in repeating all Fish Processing Units (UPI) in Indonesia in order to meet the requirements in the export market. Indonesia has advantages over other countries, namely the availability of very large fish raw materials.

At the same time, currently fishery product exports from the Philippines, Thailand, Vietnam and a number of Southeast Asian countries are dropping. The European Union also applies strict requirements for fisheries products which make it difficult for these countries to meet the requirements to enter the Blue Continent.

As known, most of the fishery products from these countries previously originated from catches in the territory of Indonesia which were then taken there. But thanks to the government's efforts to suppress illegal fishing, it made them difficult for getting raw materials.



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