



Indonesian *Ornamental* **FISH**



WHAT'S INSIDE

Having such a rich biodiversity, human resources and Government support, Indonesia still has a lot of potential to fulfill the robust growth demand of ornamental fish around the world.

editor's desk



Dear valuable readers,

Ornamental fish industry is a big business. It involves more than 125 countries in the field of production, collection, breeding, and trading. And it also plays as a basis for other supporting industries.

Having such a rich biodiversity, human resources and Government support, Indonesia still has a lot of potential to fulfill the robust growth demand of ornamental fish around the world. Indonesia ornamental fish are known for its unique, top quality and abundant choices to make Indonesia as one of top suppliers in the world.

Nowadays, with supports from many institutions, Indonesia also offers its capacity as its produce not only freshwater aquaculture but also marine origin ornamental fish at the same time.

Export News this January Edition will discuss about Indonesian export of ornamental fish, starts from the market review, glimpse of product review, export development as well as important information to assist readers whom attracted to source ornamental fish from Indonesia. This edition also contain exporters list for ornamental fish products.

Hopefully you enjoy the reading. Welcoming you to sourcing from Indonesia.

Thank You

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Hot Issue

**INDONESIAN
ORNAMENTAL FISH**





HOT ISSUE

Indonesian *Ornamental* FISH



Generally, other than conservation and environmental issues, there are numerous challenges regarding the ornamental fish industry, which also the case in Indonesia. Matters in supply, traceability and data, sustainable practice along the supply chain, disease, technology as well as transportation practices, are among some of the most important issues that should be in balance with the economic purpose of giving welfare to community with regard to cyclical nature of this industry.

Most of Indonesian supplies of ornamental fish comes from local producers, and mostly are small fish farming Facing high risks of production and marketing, sometimes they could not revive after something bad happened. At the same time, the occupation is the source of their family livelihood.

In order to provide safeguard and conducive business environment, the Government of Indonesia through the Ministry of Marine Affairs and Fisheries hand in hand with Indonesian Financial Service Authority, initiates fishery insurance program for small scale fish farmers. The program is named Fishery Insurance for Small Fish Cultivators (APPIK). This affirmative policy is directly addressed to empower small scale fish farmers and give them support to rise again suppose there happened to be hit by disease or natural disaster which cause production failure. Moreover, the initiative is the first scheme in the world that will provide a guarantee for the sustainability of the small scale fishery business, including ornamental fish farming.

This is a serious step from the Government of Indonesia to pay attention not just for the development to the industry but also for rural and coastal area development. The program was launched in 2017 based on Indonesian Regulation on Guarantee of Risk Protection to Fishermen, Fish Cultivators and Salt Fishers in 2016. Since then it has given to in as much as 14 Provinces in Indonesia including 37 production district. More than 3.300 hectares area and 2,004 small scale fish farmers covered under this program in 2017.

Being so relevant in the ornamental fish sector in Indonesia, Government of Indonesia gives high hopes that this program could give assurance to small scale farmers in Indonesia, managing database of potentials and at the same time prepare sustainability to the cycle of this industry.

We are welcoming you sourcing ornamental fish from Indonesia.

MARKET REVIEW



Indonesia's Ornamental Fish Industry

The ornamental fish industry is an important part of international fish trade. This industry is a big business. It involves more than 125 countries in the field of production, collection, breeding, and trading. Moreover, it is not just about thousands of species of fish but this industry also plays indirectly as a basis for other supporting industries of equipment such as fish tanks, food, filters, medication, and other accessories.

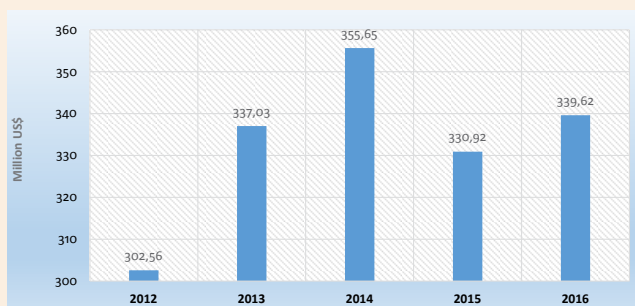
This sector also involves important resources poverty alleviation and environmental utilization, especially in developing countries. People in the coastal and riverine are able to make use of ornamental fish, which can be a sustainable and renewable resource, as a source of income. Indeed, the ornamental fish sector is a global component of international trade, fisheries, aquaculture and economic development.

However, relatively to the international fish trade and to other products, the ornamental fish industry's contribution in terms of trade values small. The scope of this sector is often underestimated. Therefore, the statistical data is limited and also the impact on human and aquatic communities is often not accurately known.

even greater if we looked at longer period of time. Global export value of ornamental fish in 2000 was recorded at US\$ 177.7 million, which was only half of today's export value. Researches and experts keep optimistic with the future of this industry.

Asia keeps its position as the largest global supplier and exporter for ornamental fish. Unfortunately, there's an emerging supply trends that seemed unfavorable for ornamental fish export from Asia. Since mid-2000, it was considered more advantageous to operate the fish farm in the locations closer to consumer. With high concentration of consumer in the northern global part, such as United States and Europe, some hubs emerged. The hubs included countries such as Singapore and Czech Republic. Other important trading hubs including China, Germany, Hong Kong, Malaysia and the Netherlands which re-export a large share of their imports. The condition applied especially for fresh water origin and farm raised fish, since more than 70% of global export value went to this category. Even though the market share for Asia is decreasing due some factors, in 2016, Asia still occupied around 50% of total global export value of the product.

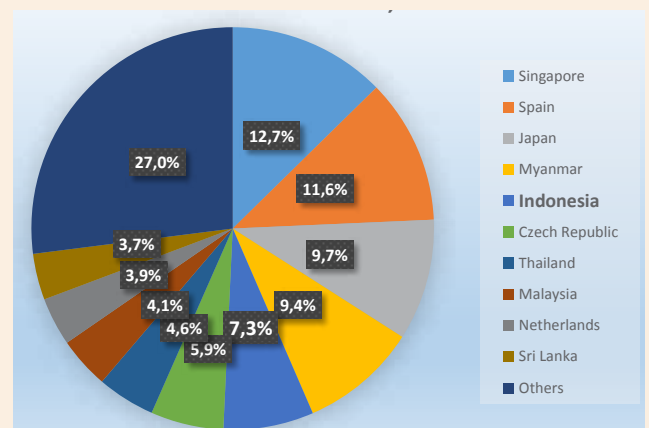
World Export Value of Ornamental Fish



Source : Trademap, January 2018

Based on trade statistics, the global export value of ornamental fish trade had grown positively during the five years period of 2012 to 2016. The value reached the peak in 2014 with US\$ 355.65 million and slightly decreased in two years after. However, global export trend still showed optimism with average growth reached 2.15% per year during 2012-2016 period. The significance in export value growth was

World Top Exporters of Ornamental Fish, 2016



Source : Trademap, January 2018



MARKET REVIEW

The global export structure of ornamental fish showed high concentration on country of origin. In 2016, ten exporting countries dominated 73% of global export value. Six of them are Asian countries, which proven Asia is still the leading base for supply and trade. Among countries in Asia, Indonesia is one of the top producing and exporting countries. This country ranked fifth in global position with 7.3% of world total export of ornamental fish in 2016.

On the other hand, marine origin is not clearly described in HS code system, but “dory” and “nemo” from famous movie “finding nemo” are definitely two of them. Export of marine origin was accounted around 30% of Indonesian total export of ornamental fish during 2012-2016. Marine ornamental fish is harder to handle and way more expensive than freshwater origin. That’s why the demand tends to be lower than freshwater origin ornamental fish. But this share was increasing, with 3.56% average growth per year during 2012-2016.

Indonesian Export of Ornamental Fish

No	HS Code	Description	Export Value (US\$ Thousand)					Share (%) 2016	Trend (%) 2012-2016	Growth (%) 2015-2016
			2012	2013	2014	2015	2016			
Marine			5,503	7,546	5,207	5,495	7,682	31.17	3.56	39.80
1	'0301199000	Live marine ornamental fish,	5,488	7,543	5,197	5,493	7,681	31.17	3.62	39.83
2	'0301191000	Live marine ornamental fish, fry	15	3	10	2	1	0.00	-44.13	-50.00
Freshwater			15,511	16,651	15,654	14,174	16,960	68.83	0.18	19.66
3	'0301119990	Other freshw ater ornamental fish, live	5,567	5,255	6,395	5,840	6,845	27.78	5.33	17.21
4	'0301119510	Red arow anes	2,582	4,458	2,671	2,413	4,361	17.70	4.44	80.73
5	'0301111000	Live freshw ater ornamental fish, fry	4,388	4,341	4,305	3,848	3,588	14.56	-5.10	-6.76
6	'0301119590	Arow anes, than not red	1,877	1,680	1,386	1,407	1,586	6.44	-5.01	12.72
7	'0301119910	Botia (botia macracantha)	775	662	696	504	465	1.89	-12.14	-7.74
8	'0301119920	Discus (symphisodon discus)	227	163	117	97	65	0.26	-26.07	-32.99
9	'0301119100	Koi carp (cyprinus carpio)	76	75	60	28	25	0.10	-27.45	-10.71
10	'0301119300	Siamese fighting fish (beta splendens)	13	10	20	35	25	0.10	29.18	-28.57
11	'0301119200	Golden fish (carassius auratus)	5	7	3	0	0	-	-	-
12	'0301119400	Oscars (astonotus ocellatus)	1	0	1	2	0	-	-	-
TOTAL ORNAMENTAL FISH			21,014	24,197	20,861	19,669	24,642	100.00	1.12	25.28

Source : Trademap, January 2018

The potential of Indonesia as a top exporter of ornamental fish is even greater, in regards developing direct export to consumer countries. Indonesian export figure in 2016 showed that China, Singapore and Germany were among the top destination countries of Indonesian ornamental fish, sequently ranked 1st, 4th, and 6th. Those couentries are still major hubs for global export of ornamental fish.

Indonesian ornamental fish industry is export oriented. It means that most of the production goes to international market as export product. Export of ornamental fish is recorded under HS code of 030111 (Live ornamental freshwater fish) and 030119 (Live ornamental fish, excluding freshwater). Basically, Indonesia export all of the products under those two HS code.

Most of Indonesian export are freshwater origin, with almost 70% of Indonesian total export value. In sync with the global demand, the vast majority of ornamental fishes in the aquarium trade is of freshwater origin and farm-raised while aquarium is the most popular for ornamental fish showcase. At least there are eight species clearly described under HS code as freshwater origin fish, namely red arowanes and arowanes of other colors, botia, discus, koi, siames, golden fish and oscar. Among the freshwater fish, by export value, arowanes is the main star of Indonesian export.

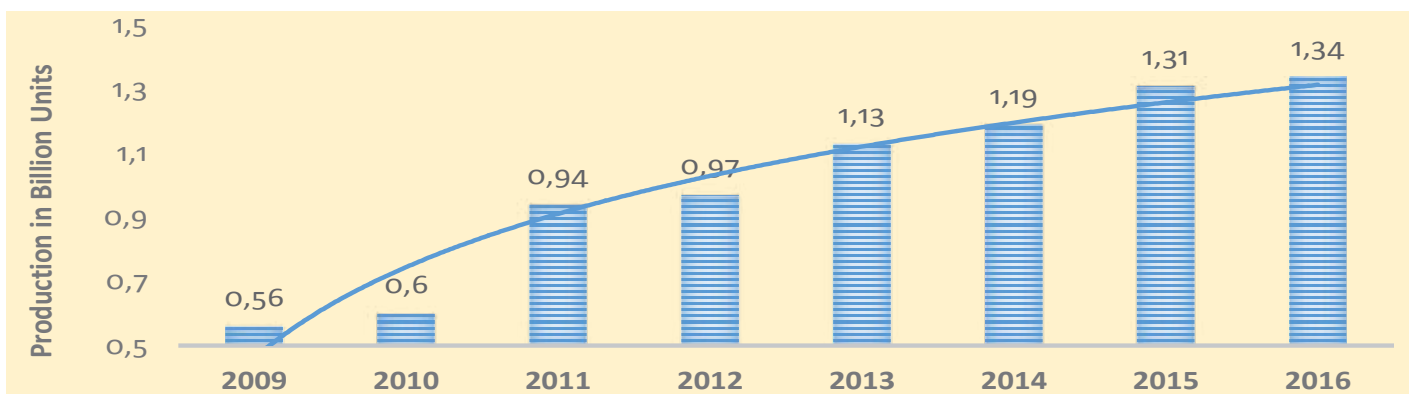
According to Infofish International, this trend of keeping marine reef ecosystem in a package with fish, corals, shell, plants and molucs is gaining popularity, especially in traditional countries like United States and European Region. Due to some development in technical and economy, this hobby is becoming more affordable.

However, there are some concerns regarding environmental issues especially marine conservation. Aquaculture for marine origin is not the domain supply. Nowadays, less than 15% of traded marine ornamental fish which sucessfully raised in captivity while only one percent of specimens comes from cultivation. So, marine ornamental fish trade still mainly depends on wild nature supply. For the purpose of conservation of natural resources and sustainability environment, some species of ornamental fish are prohibited to trade. It is considered unlawful to take, export, import rare, threatened of endangered species as listed by CITES (The Convention on International Trade in Endangered Species of Wild Fauna and Flora). CITES is an international agreement between governments. Its aim is to ensure that international trade in specimens of wild animals and plants does not threaten their survival. Indonesia currently there are 183 parties integrated under CITES. Indonesia is one of them.

CITES lists species under three appendices. Appendix I contains list of species that are usually rare and trade is restricted for scientific exchange only. Appendix II are common species in the wildlife trade and trade is regulated with special permits from exporting countries. Export of any fish or species under Appendix II from Indonesia must be accompanied by CITES Appendix II export permit from Indonesia. While, Appendix III species are regulated when they come from spesific countries and usually treated as species from Appendix II. For more information about this, please log on to www.cites.org.

Being a tropical country, rich with its natural resources from coastal, marine and river area makes Indonesia as a home of exotic ornamental fish in the world. According to Ministry of Marine Affairs and Fisheries Indonesia, out of 32,400 species of ornamental fish in the world, as much as 4,552 species are exist in Indonesia (27% of the number goes to freshwater origin ornamental fish). Such a large amount of species, is widespread in freshwater and marine area in Indonesia.

Indonesian Ornamental Fish Production



Source : Ministry of Marine Affairs and Fisheries Indonesia, January 2018

Practically, in wild nature, the fishermen used net made from woven. But it was only in the past that they used to collect fish without paying attention to the species that been caught. Nowadays, they use fins, masks, and standarized netting product to collect only fish that meets buyer demand, requirement and spesification. This due the fact that fish collectors are becoming incresingly pay attention to sustainability issues and how they could take action to use the environment but protect it at the same time.

It is recorded that Indonesian production of ornamental fish hit 1,34 billion units in 2016 and increased by average of 13.82% per year during eight year period in 2009-2016. The data from Indonesian Ministry of Foreign Affairs and Fisheries showed consistent increasing in each year compared to the previous year. On this background, Indonesia through Ministry of Marine Affairs and Fisheries aims to reach national ornamental fish production of more than two billion units by 2019.



Production Center of Ornamental Fish in Indonesia by Province

NUM.	PRODUCTION CENTER	TYPES OF FISH
Sumateran Island		
1	Aceh	Wild Betta (Cupang Alam)
2	North Sumatra	Koi, Goldfish (Koki), Moli, Betta, Discus
3	Riau	Arwana, Betta, Guppy, Manvis, Platy
4	West Sumatera	Koi, Comet (Komet), Koki, Carp (Gurame padang), Rasbora
5	Riau Island	Guppy, Koi, Comet
6	Jambi	Botia
7	Bangka Belitung	Koi, Platy, Wild betta, Molly
8	South Sumatera	Koi, Betta (Cupang), Manfish, Goldfish, Comet
9	Lampung	Betta, Guppy, Comet Marine Ornamental Fish, Nemo, Sea Horse (Kuda laut)
Java Island		
10	Banten	Betta, Guppy, Neon Tetra, Discus, American flagtail
11	Jakarta	Koi, Betta, Manfish, Guppy, Arowana super red Wild Betta
12	West Java	Koi, Betta, Comet, Koki, Baster, Manfish, Guppy, Neon Tetra, Moly, Rednose, Black ghost, Cardinal tetra, Puntius denisonii, Garra rufa, Kongo tetra, Silver dolar, Corydoras, Palmas, Phurchanta kongo Rainbow bosemani, Redrainbow, Rainbow peacock
13	Jogjakarta	Koi, Goldfish, Molly, Platy, Guppy
14	Central Java	Koi, Betta, Koki, Guppy, Arowana
15	East Java	Koi, Betta, Comet, Goldfish, Manfish, Platy, Guppy, Moly, Akara, Platis Marine Ornamental Fish
Bali and Nusa Tenggara		
16	Bali	Marine Ornamental Fish
17	West Nusa Tenggara	Koi, Betta, Platy
Kalimantan Island		
18	West Kalimantan	Koi, Goldfish Arowana super red, Botia, Tiger fish
19	Central Kalimantan	Koi, Guppy, Betta
20	South Kalimantan	Betta, Guppy, Koi, Arowana
Sulawesi Island		
21	North Sulawesi	Koi, Goldfish, Manfish, Guppy Marine Ornamental Fish
22	Gorontalo	Koi, Comet, Goldfish
23	Central Sulawesi	Koi Marine Ornamental Fish - Banggai cardinal fish
24	South Sulawesi	Koi, Betta, Goldfish, Ornamental Shrimp, Comet Marine Ornamental Fish, Sea Horse
25	Southeast Sulawesi	Marine Ornamental Fish - Banggai cardinal fish
Maluku and Papua		
26	Maluku	Marine Ornamental Fish, Nemo, Banggai cardinal fish, Blue devil, Mandarin
27	Papua	Arowana, Rainbow



Notes :

- Green for freshwater ornamental fish
- Blue for marine ornamental fish
- Orange for Endemic species/Geographical Indication, species that is originally from Indonesia

The ornamental fish industry is an important source of income for many fishing villages throughout Indonesia. Based on Indonesian Economic Sensus in 2013 done by Statistics of Indonesia, cultivation of ornamental fish ranked first as the highest sources of income from agricultural sector. Approximately there are 27 provinces in Indonesia that serve as production center for ornamental fish originated both from marine and freshwater. Production in Indonesia is mainly dominated in Java Island, namely East Java, Central Java, West Java, Jakarta and Banten and then followed by other areas in Kalimantan, Sumatera, Sulawesi, Maluku, Papua, Bali and Nusa Tenggara. East Java alone, contributes around 20% of national production.

The biggest contributor in production comes from freshwater fishes of five species including Platy, Baster, Comet, Hickey and Koi while marine ornamental fish, nemo fish occupy the highest position followed by sea horse, mandarin fish, cardinal and blue devil. Furthermore, there are also endemic species originally from Indonesia

such as Banggai Cardinal from the Banggai Island of Indonesia, some species of Arowana, Botia of Southeast Asia and so on. Especially for Banggai cardinal, there is no restriction on trade and ownership for this species, but for conservation reason, there will be a set of rule in taking the fish from several spots. This step is the first taken to register marine aquarium fish as a rare species of about 28 species of other ornamental fish. For more information about Indonesian ornamental fish biodiversity please contact Ministry of Marine Affairs and Fisheries Indonesia.

With biodiversity, human resources involved as well as support from Government and associations, ornamental fish industry of Indonesia is surely develop in the near future to come. Sourcing from Indonesia is the right kind of choice. If you have further queries regarding importing ornamental fish products from Indonesia, please contact Customer Service Center DGNED (email to csc@kemendag.go.id)

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Products: Fish, Live, Marine Ornamental Fish, Live Beetle & Speciment
 Contact: Ir. Wiranto Gunawan, Deddy Mulyadi, Zaenal Arifin

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 Website: <http://www.javara.co.id/>

Products: Ornamental Fish, Coral And Similar Material, Unworkd Or Simply Prepared, Fish, Live.
 Contact: Susanto Herlambang, Prasetyo

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