



# DEVELOPMENT OF DOMESTIC AND EXPORT MARKET OF INDONESIAN PANGASIU

**Budhi Wibowo**  
Chairman

## CURRICULUM VITAE

Nama: Budhi Wibowo  
Tempat/Tanggal lahir: Pasuruan, 27 Mei 1963

Pendidikan:  
1982-1986 S1 Jurusan Teknik Industri, Fakultas  
Teknologi Pertanian, IPB

Pengalaman professional:  
Desember 2015-sekarang Ketua Umum Asosiasi  
Pengusaha Pengolahan & Pemasaran Produk  
Perikanan Indonesia (AP5I)  
2010-sekarang Indonesia Representative of Green  
Food Co, Korea  
1992 – sekarang: Indonesia representative of Great  
Oceania Seafood Supply, Co. Ltd – Taiwan  
1990-1992: Export Marketing Manager and Local  
Trading Manager of ICS Group  
1987-1989: Kepala Bagian Pengajaran Sekolah  
Tinggi Ilmu Komputer Surabaya (STIKOM)

Pengalaman menulis:  
Jangan Menjual Jika Tidak Tahu Ilmunya, Elex Media  
Komputindo, 2009,  
Menembus Pasar Ekspor, Siapa Takut???,  
Sukses menjadi Entrepreneur Kaliber Internasional,  
Elex Media komputindo, 2010  
Dibenci tapi Dirindu, Sukses sebagai Perantara, Elex  
Media Komputindo, 2010

Sukses Hidup sehari-hari dengan 50 taktik  
negosiasi Elex Media Komputindo, 2011

### LAIN-LAIN

Dosen luar biasa Entrepreneur di Universitas Ciputra

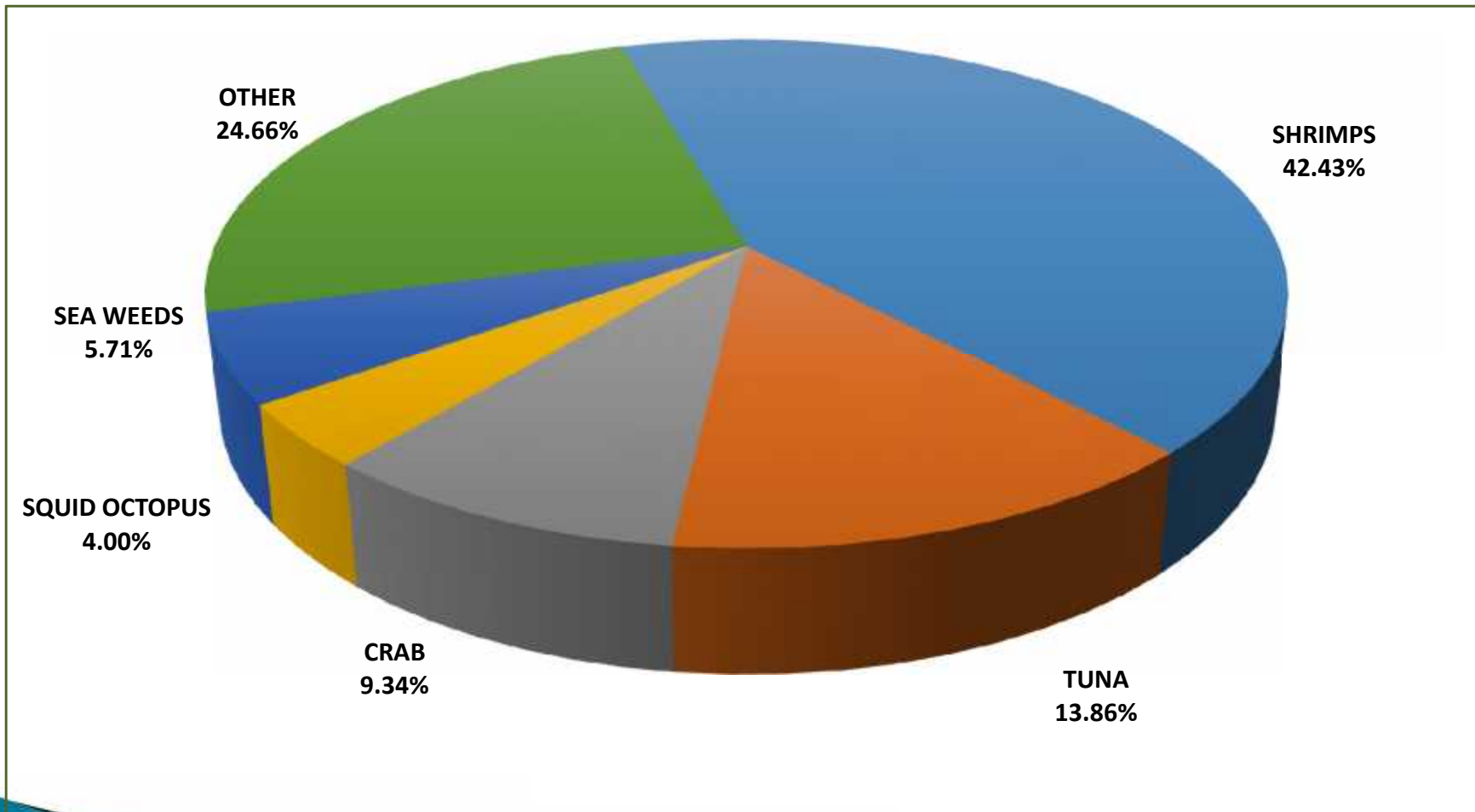
Marketing Advisor pada beberapa perusahaan

Pembina Komunitas UKM Berbagi Bersama Berkembang  
(BBB) Indonesia

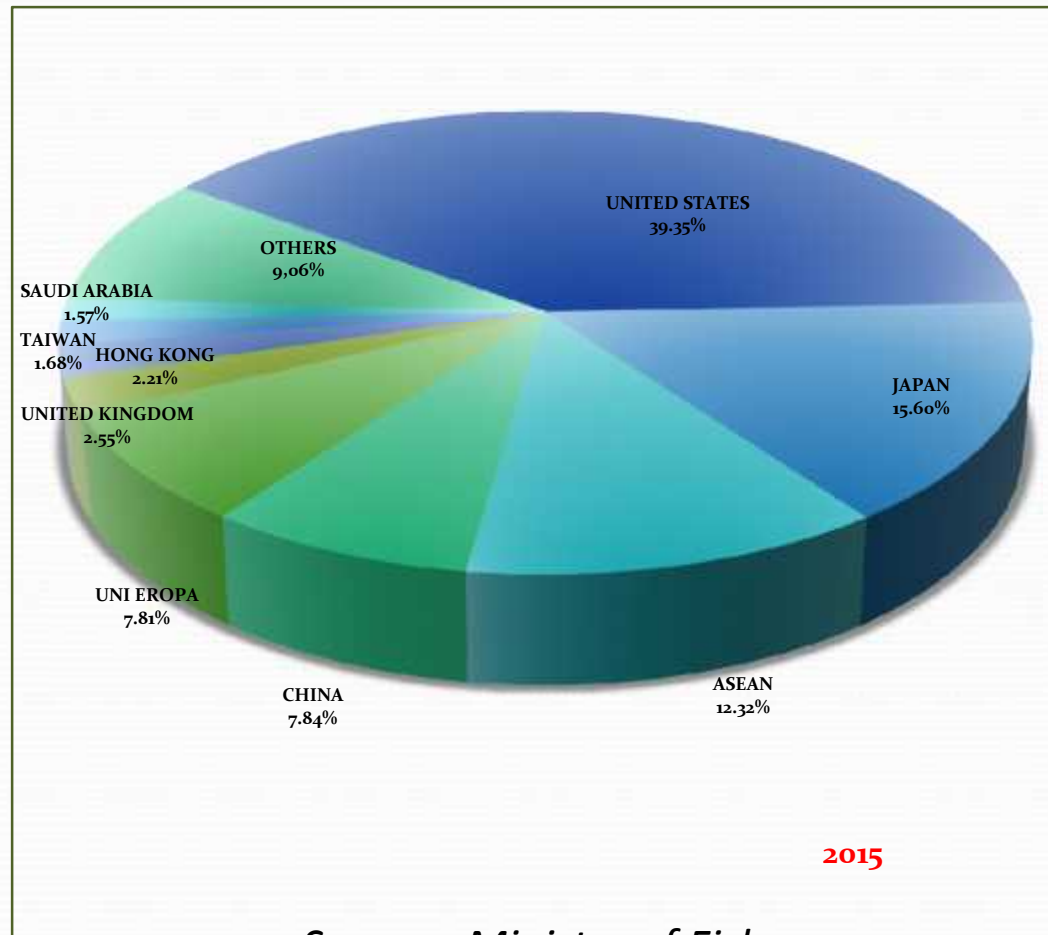
Memberikan berbagai pelatihan tentang MARKETING,  
SELLING SKILLS, INTERNATIONAL TRADING dan  
NEGOSIASI di berbagai perusahaan dan perguruan tinggi



# Ekspor major product 2015 (value)



# Export by Country



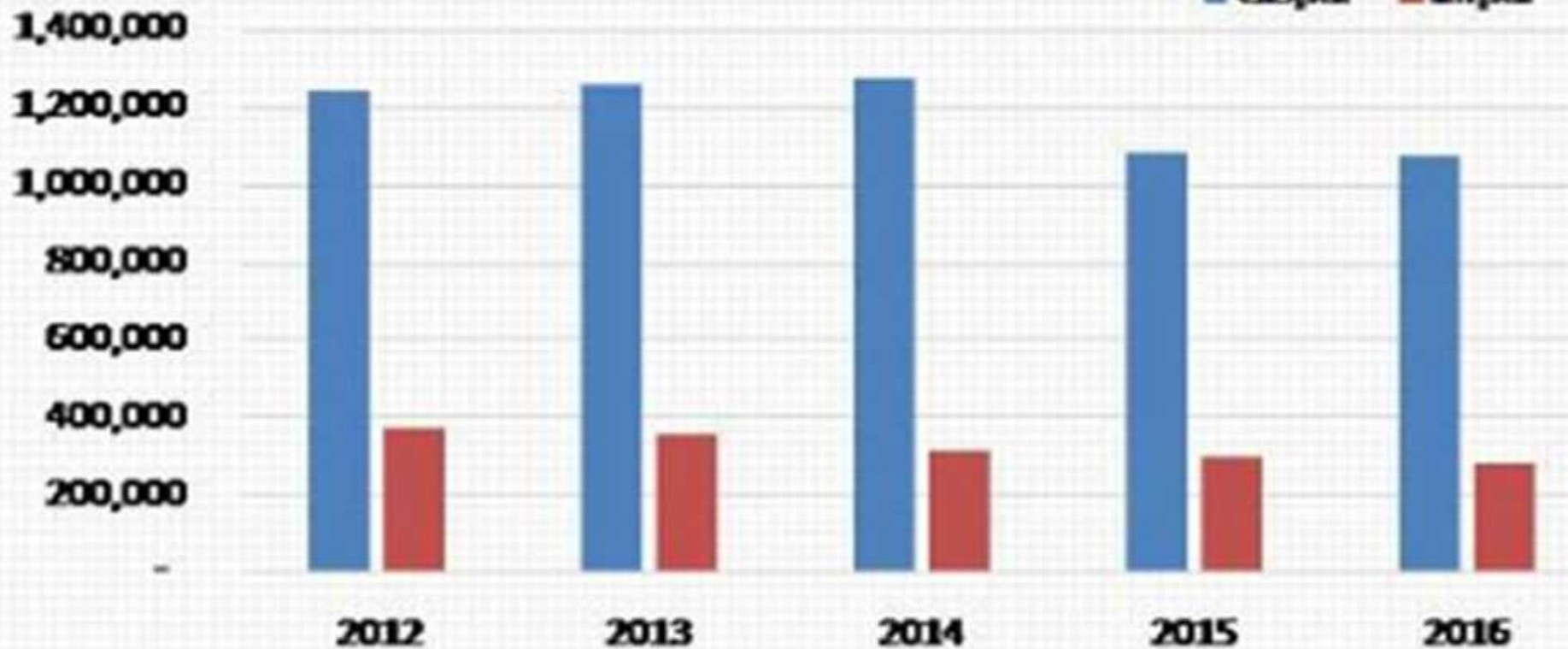
2015

Source : Ministry of Fishery

# Indonesian Fishery product export 2012-2016

## VOLUME (TON)

■ ekspor ■ impor



	2012	2013	2014	2015	2016
EKSPOR	1,240,922	1,256,378	1,274,972	1,077,844	1,077,136

\* Sumber : BPS, diolah KKP

# Kondisi Faktual (2015)

## Bahan Baku Yang diolah Dan Tingkat Utilisasi pada Industri Hasil Laut Tahun 2015

Perusahaan/ Unit Usaha	Kode HS	Uraian	Kapasitas (ton)	Bahan Baku Terolah (ton)	Kekurangan Bahan Baku (ton)	Utilitas
674 Perusahaan Pengolahan Ikan dan Udang	0303	Ikan Beku	975.000	353.592	621.408	36,3%
	0304	Ikan Fillet	480.000	287.481	192.519	59,89%
	0306	Udang Beku	500.500	293.373	207.127	58,62%
	160521, 160529, 160510	Dahan Udang/Kepiting dan Non Ikan Lain	149.500	110.384	39.116	73,84%
41 Perusahaan Pengalengan Ikan	160414	Tuna/Cakalang Kaleng	465.000	181.916	283.084	39,1%
	160413	Sardin Kaleng	230.000	117.469	112.531	51%
	160415	Mackerel Kaleng	67.000	48.369	18.631	72,2%
65.766 Unit Pengolahan	0305	Ikan Asap/Kering	45.000	28.539	16.461	63,4%
	0307	Kerang2an	200.000	164.855	35.145	82,4%
		Pindang	639.245	396.332	242.913	62%
			<b>3.751.245</b>	<b>1.982.311</b>	<b>1.768.934</b>	<b>53%</b>

\* Khusus Bitung utilisasi saat ini 13%

\*\* Impor mulai 2011 setelah krisis suplai lemuru Selat Bali

*Utilitas masih sangat rendah karena kekurangan bahan baku*

**Utilitas Agregat 53%**

Total Kekurangan Bahan Baku untuk Industri :

**1.768.934 ton**

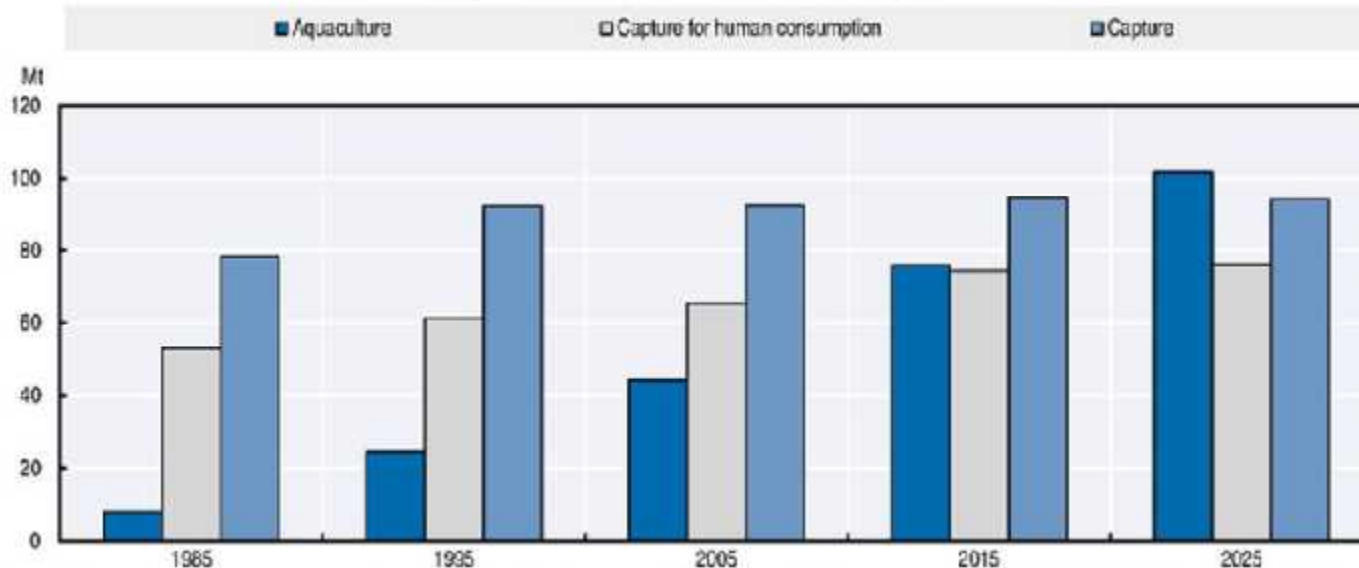
*Masih diperlukan tambahan bahan baku, baik dari lokal maupun impor*

**Impor (Jenis Ikan) Tahun 2015 "Hanya" 122.321 Ton**

**INDONESIA SHOULD  
PRIORITIZE  
AQUACULTURE**

## OECD-FAO Agricultural Outlook 2016-2025

Figure 3.6. **Aquaculture production and capture fisheries**



Aquaculture will continue to be one of the fastest growing food sectors despite its average annual growth rate slowing from 5.4% p.a. in the previous decade to 3.0% p.a. in the period 2016-25. This deceleration is due to higher costs, combined with competition for land, water and labour from alternative production systems. Much of the increase is expected in freshwater species.

# Aqua culture product for export

- ▶ Shrimps
  - ▶ Tilapia
  - ▶ Grouper
  - ▶ Snapper
  - ▶ Milk fish
  - ▶ Cat Fish
  - ▶ Eel
- e.t,c

**99000 km Coastal line**



# Salmon Farm Norway



## Lessons learnt from Norway

- ▶ focus on one certain species
- ▶ All stakeholders including govt and private sectors fully support the development of the species
- ▶ Huge R&D funds to support (quality brooders, health management)



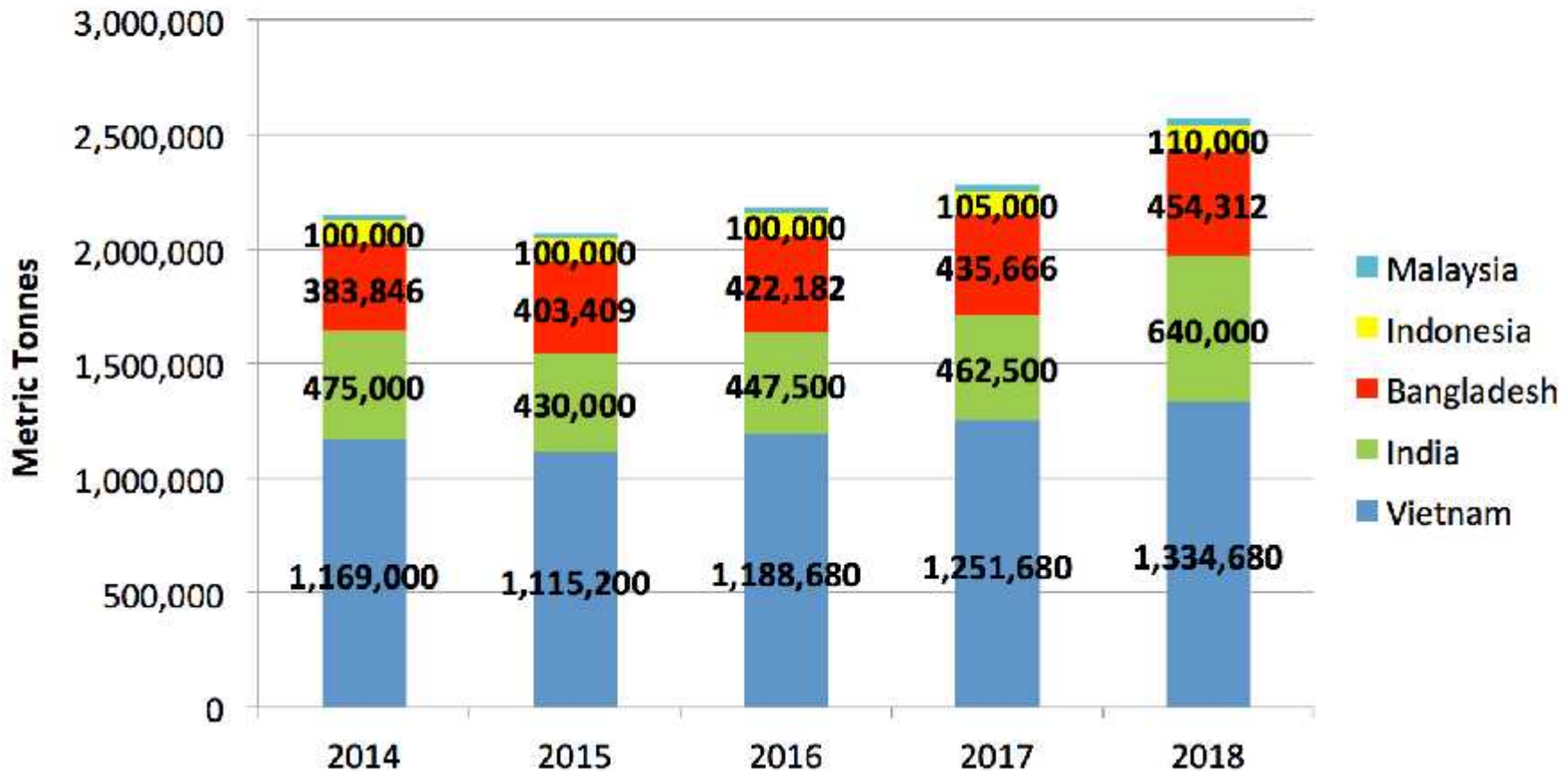
# Indonesia Aquaculture development strategy in order to be able to compete

- ▶ 1. Serious development of certain species to focus on
  - a. Brackish: shrimp
  - b. Fresh: pangasius)
  - c. Marine: seabass barramundi
- ▶ 2. All stakeholders focus on development of integrated industry of these species
- ▶ 3. R&D projects to develop quality brooders and health management



# Pangasius

## Production in selected countries



# Opportunities to enter the market replacing Vietnam due to the large numbers of issue of food safety pangasius vietnam (dori fish)

[Vietnam faces shutdown in US pangasius sales after effort to repeal ...](https://www.undercurrentnews.com/.../vietnam-faces-shutdown...)

<https://www.undercurrentnews.com/.../vietnam-faces-shutdown...> - Terjemahkan laman ini

19 Jan 2017 - SAN FRANCISCO, US - Vietnamese pangasius sellers and US importers face a possible shutdown in trade on Sept. 2 after the failure of ...

[Vietnams Pangasius Industry Under Attack in EU as Carrefours Sales ...](http://www.seafoodnews.com/.../Vietnams-Pangasius-Industry-Under...)

[www.seafoodnews.com/.../Vietnams-Pangasius-Industry-Under...](http://www.seafoodnews.com/.../Vietnams-Pangasius-Industry-Under...) - Terjemahkan laman ini

14 Mar 2017 - Vietnam's Pangasius Industry Under Attack in EU as Carrefour's Sales Ban Fuels NGO, Media Criticism SEAFOODNEWS.COM by Michael ...

[Gawat Ikan Dori Beracun dari Luar Negeri Beredar di Ritel : Okezone ...](https://economy.okezone.com/.../gawat-ikan-dori-beracun-dari-luar-negeri-beredar-di...)

<https://economy.okezone.com/.../gawat-ikan-dori-beracun-dari-luar-negeri-beredar-di...> -

9 Okt 2017 - Terbukti ikan Dori baik lokal maupun impor yang ditemukan tidak aman ... dan dapat membahayakan kesehatan konsumen," kata Wakil Ketua ...

[Kenapa Ikan Patin dari Vietnam Bisa Beredar Luas, Padahal ...](http://www.mongabay.co.id/.../kenapa-ikan-patin-dari-vietnam-bisa-beredar-luas-padahal...)

[www.mongabay.co.id/.../kenapa-ikan-patin-dari-vietnam-bisa-beredar-luas-padahal...](http://www.mongabay.co.id/.../kenapa-ikan-patin-dari-vietnam-bisa-beredar-luas-padahal...) -

16 Okt 2017 - Kondisi ini mesti segera diatasi sebab selain ikan dori, terdapat jenis ikan lain ... Beredarnya impor patin ilegal di pasar Indonesia karena

[BAHAYA IKAN DORI VIETNAM: Mengandung Zat Berbahaya ...](http://industri.bisnis.com/.../Bahaya-Ikan-Dori-Vietnam-Mengandung-Zat-Berbahaya...)

[industri.bisnis.com/.../Bahaya-Ikan-Dori-Vietnam-Mengandung-Zat-Berbahaya...](http://industri.bisnis.com/.../Bahaya-Ikan-Dori-Vietnam-Mengandung-Zat-Berbahaya...) -

13 Okt 2017 - Pemerintah diimbau melakukan sosialisasi bahayanya ikan dori dari Vietnam ... yang melebihi ambang batas dan membahayakan kesehatan konsumen. ... IMPOR PATIN ILLGAL TERBONGKAR. KKP Harus Tingkatkan...

[KKP: Ikan Dori Ilegal Mengandung Unsur Pemutih di Luar Batas](https://www.cnnindonesia.com/.../Kkp-ikan-dori-ilegal-mengandung-unsur-pemutih-d...)

<https://www.cnnindonesia.com/.../Kkp-ikan-dori-ilegal-mengandung-unsur-pemutih-d...> -

10 Okt 2017 - KKP: Ikan Dori Ilegal Mengandung Unsur Pemutih di Luar Batas - ambang batas dan beresiko membahayakan kesehatan jika dikonsumsi.

[Terbongkar! Peredaran Ikan Patin Vietnam Berbahaya di Jakarta](http://www.kompas.com/.../Terbongkar-Peredaran-Ikan-Patin-Vietnam-Berbahaya-di-Jakarta...)

# PANGASIOUS indonesia



## Big Opportunities to enter local market replacing Vietnam dori



Indonesian pangasius mainly farmed in ponds by using spring water → Spring is contaminant free

- ▶ Indonesian Processing Factory as soon as possible must take over Vietnam Dori with Indonesian Pangasius especially at: Supermarket chain, hotel and restaurant
- ▶ Local consumption of Pangasius fillet about 10000 per year and still continue to grow



# Indonesia Pangasius Selling name ???



Cheap Price



Vietnam (not healthy)

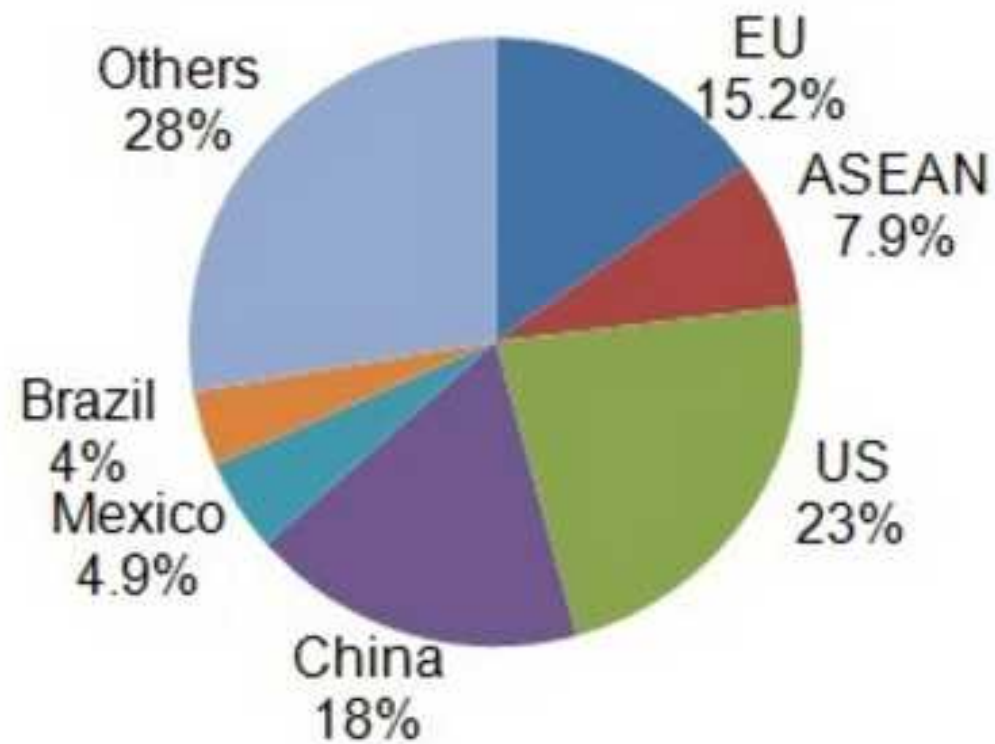
▶ PATIN FILLET

▶ PANGASIOUS FILLET

▶ DORI LOKAL FILLET



## The importing markets of Vietnam pangasius in 2016 (Value)



# Vietnam shifting pangasius exports to China

By Mike Urch

Published on October 16, 2017

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Sales of Vietnamese pangasius to two of the country's most important export markets, the European Union and the United States, are in sharp decline. European importers will not pay more than rock-bottom prices for IQF pangasius fillets, and the U.S. market has become unstable and protectionist, according to the Vietnam Association of Seafood Producers and Exporters (VASEP).

Pangasius producers in Vietnam are therefore seeking to improve sales to

Asian countries and particularly to their northern neighbor, China, the organization said.

Already there are signs that this change in focus is taking place. According to VASEP, pangasius

## Strategy towards development of Indonesian pangasius export market

- ▶ Reducing production cost (Quality brooders, feed, farm management)
- ▶ Branding Indonesia Pangasius as Health & Safety Indonesia's pangasius fish or Premium Quality Fish)
- ▶ Target Market: Market which concern Quality & food safety

Pangasius Raw Material Prices in Vietnam

27000 Vnd abt 1.2 usd per kg (october 2017)



# Japan Market opportunity



PANGASIUS

UNAGI

パンガシウス	ウナギ
ウナギと並べると見た目は一目瞭然！	
PANGASIUS	UNAGI



## Non Tarif Barrier import pangasius to Indonesia

- ▶ Soaking with Polyphosphate : max 2000 ppm
- ▶ Soaking Non Polyphosphate ???
- ▶ Water content ?

Without Soaking Pangasius water content abt 80-81 %

Soaking Increase weight 20-30 % --> water content abt 84-85 %

Soaking Increase weight 40-50 % --> water content abt 87-88 %



# Skema kepastian supplai hulu ke hilir



<http://ap5i-indonesia-seafood.com>

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