



TRANSTEC



EQUINOCCIO

# Challenges in Fishery Export to EU

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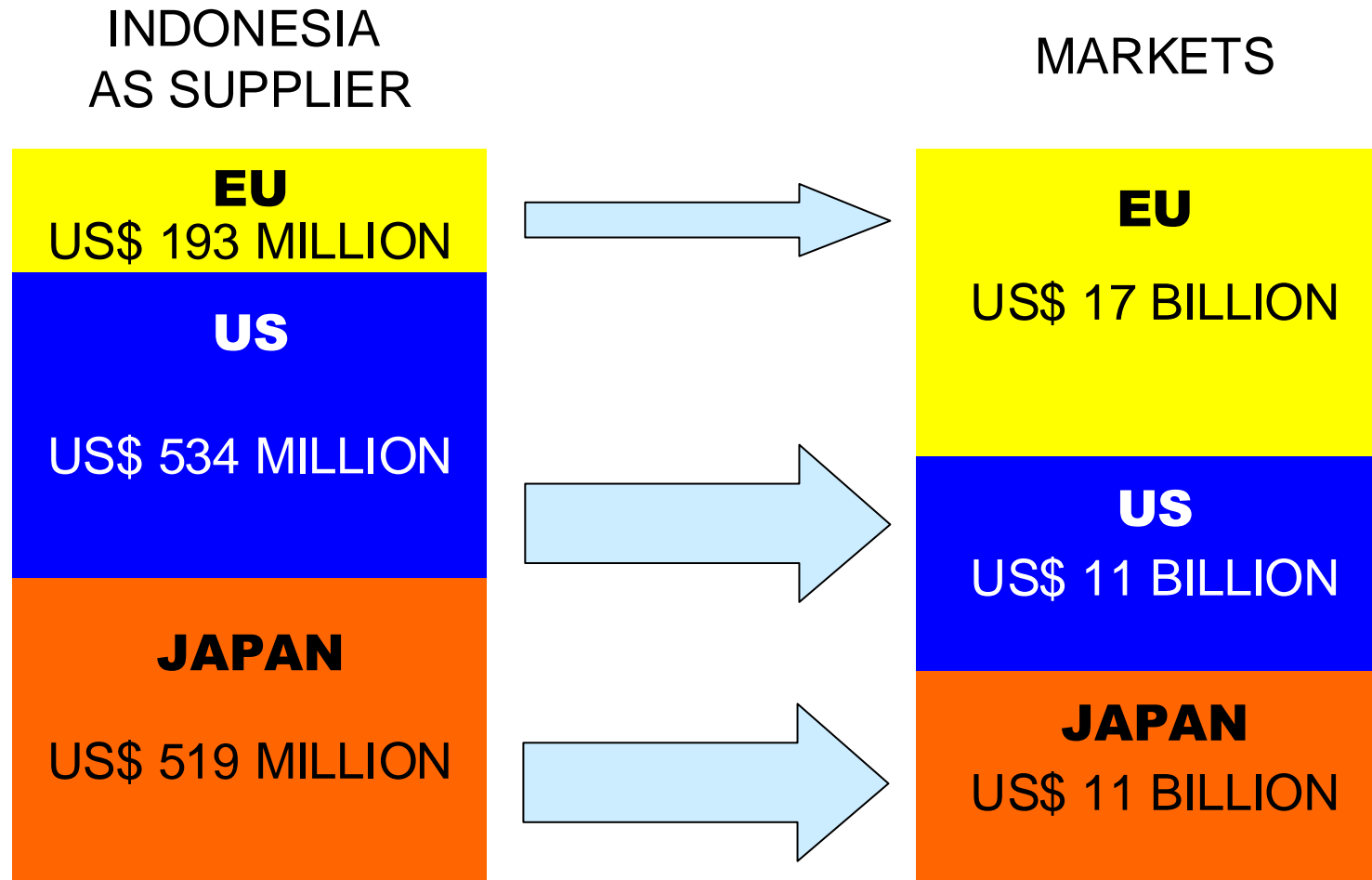
Presentation by Study Team of Indonesia Trade  
*Access to the EU Opportunities and Challenges*

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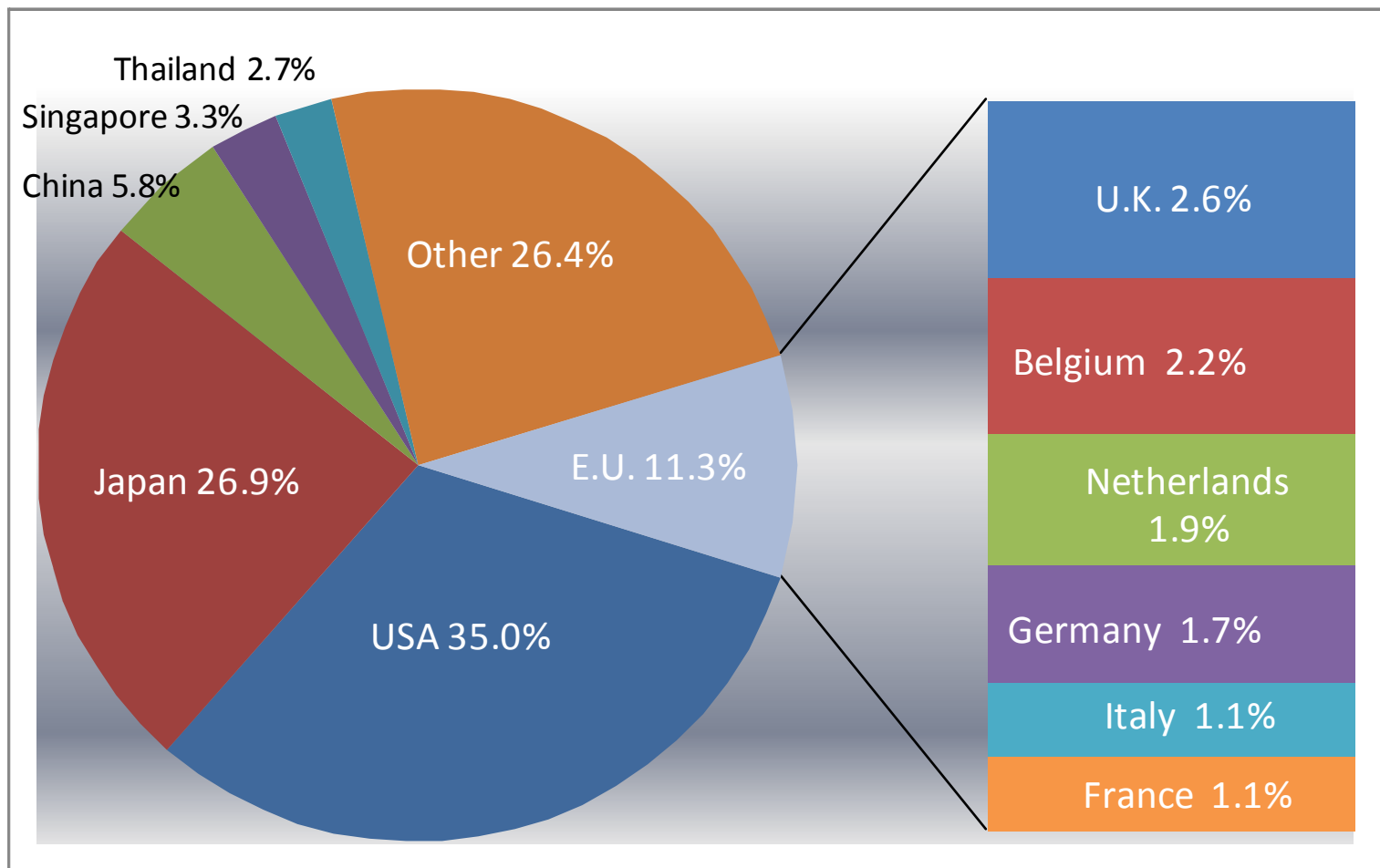
30 November  
2010



# EU Market and Indonesia's Export



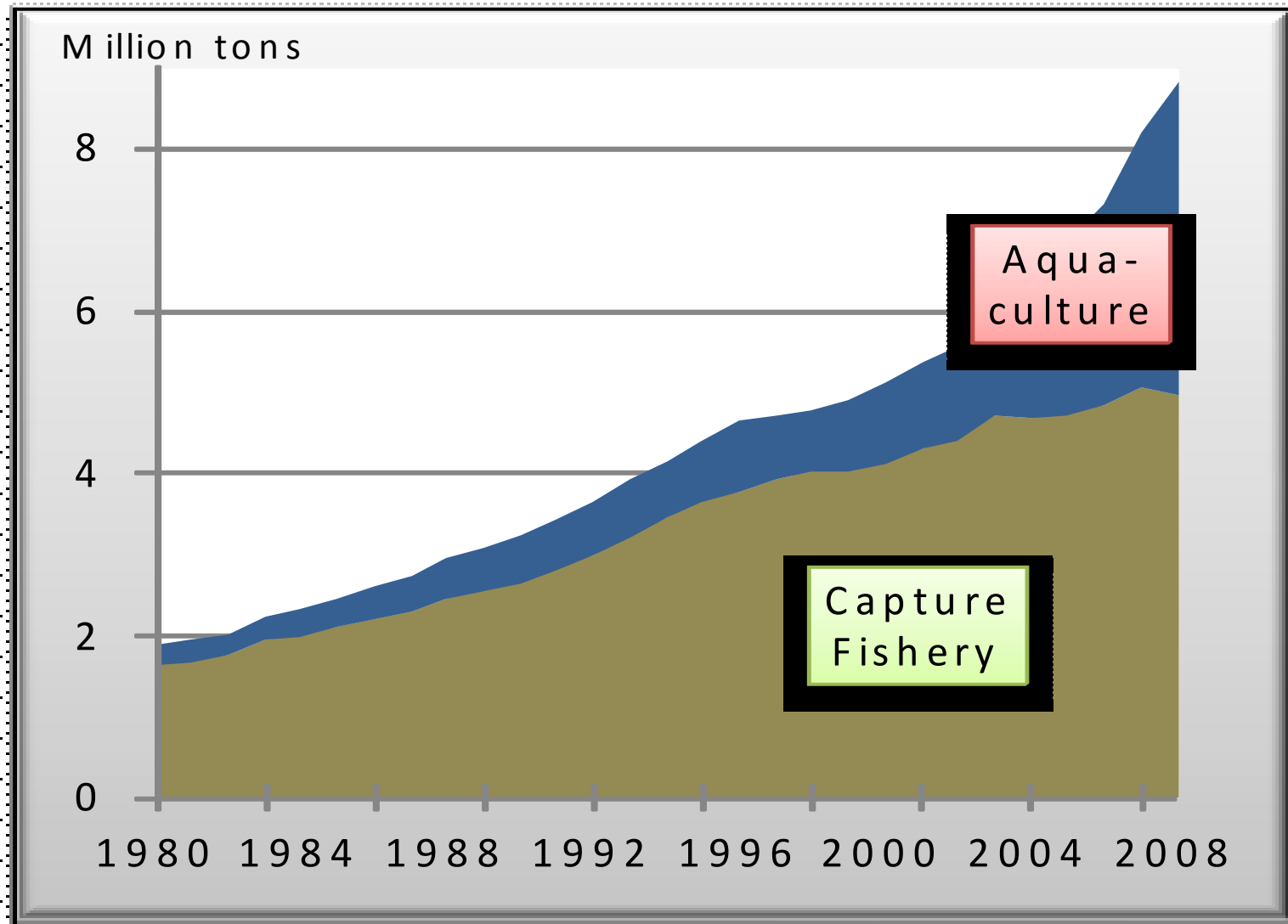
# Distribution of Indonesian Fishery Exports By Major Markets (2009)



Source: United Nations, COMTRADE database

# Importance of Fishery Industry for Indonesia

## 1. Growth of Fishery Output



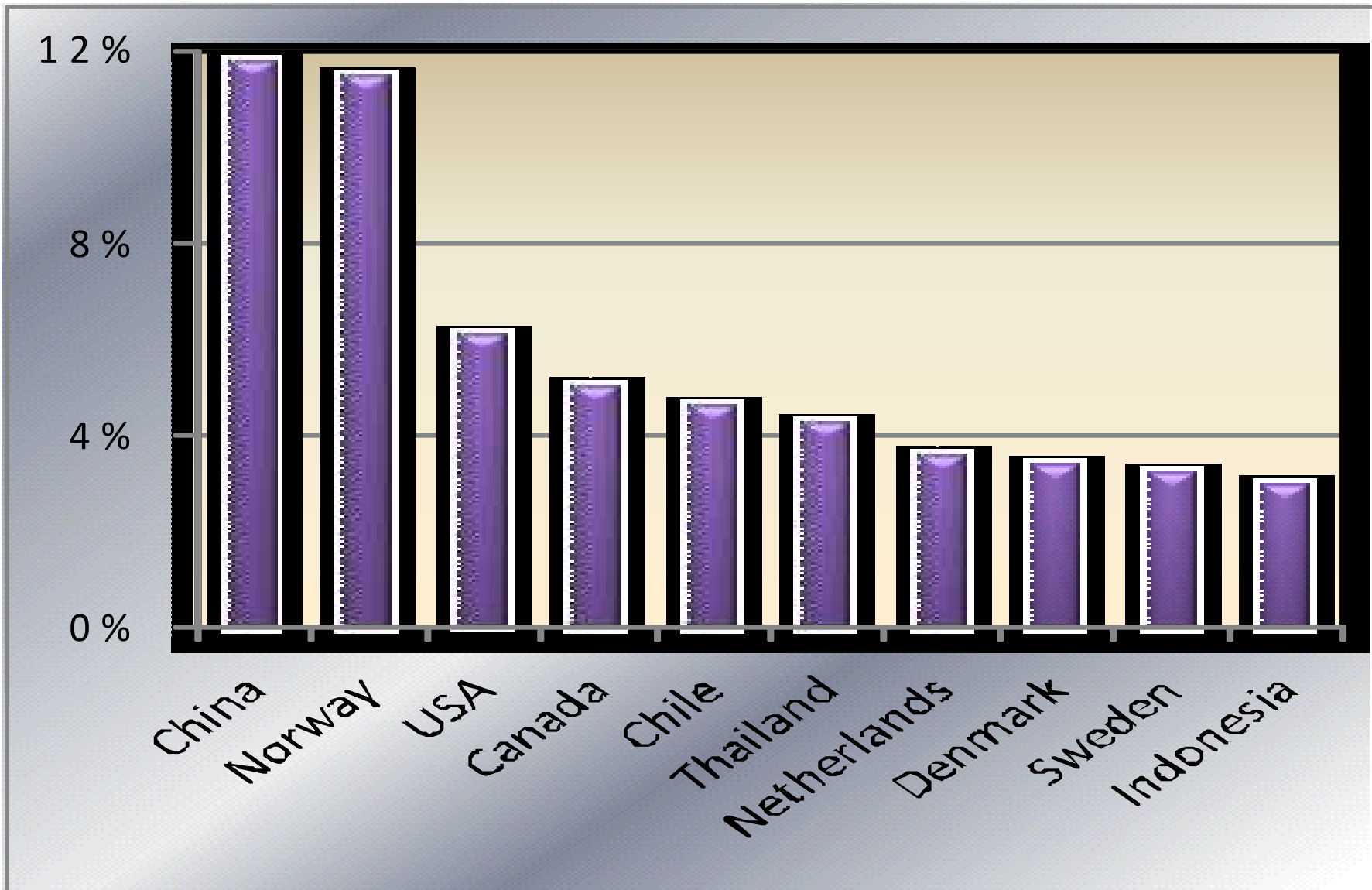
Source: FAO Fisheries and Aquaculture Information and Statistics Service

# Importance of Fishery Industry for Indonesia

## 2. Employment and SMEs

- 90% of Indonesia's fishery industry are SMEs
- Highly labor intensive industry
- 5.2 million people of Indonesia's population are directly involved in fisheries
- High development priority by GOI

# Major Global Competitors

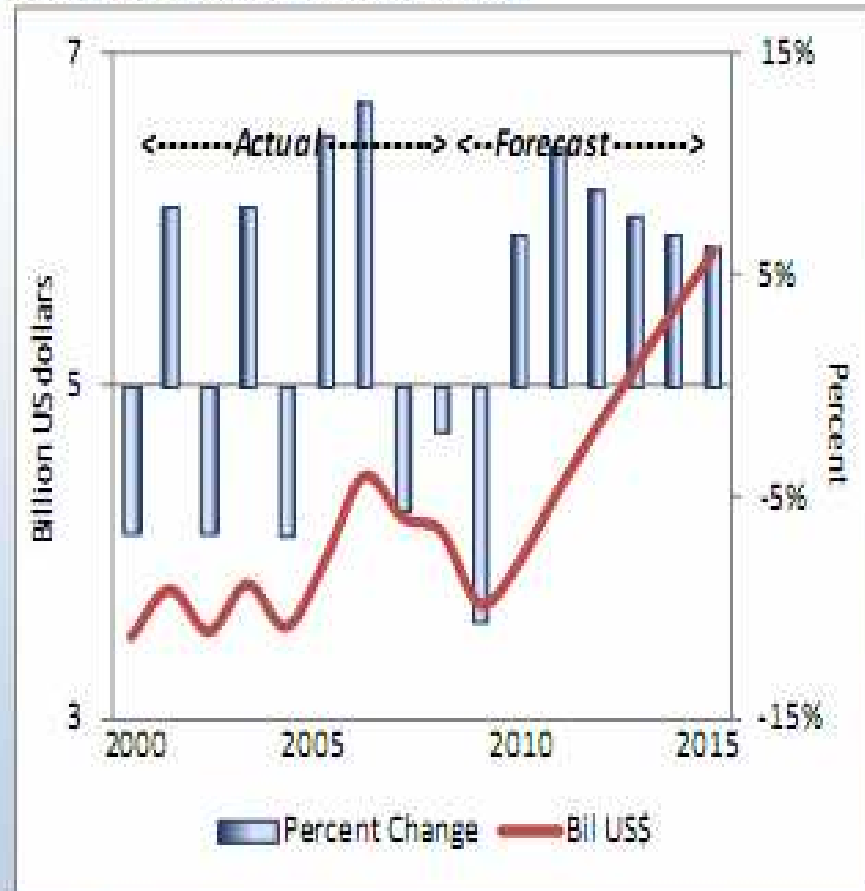


# EU Market Development and Prospects

Predicted average  
overall import growth:  
**8 percent per year.**

Above-average rates  
have been achieved in  
processed fishery  
imports.

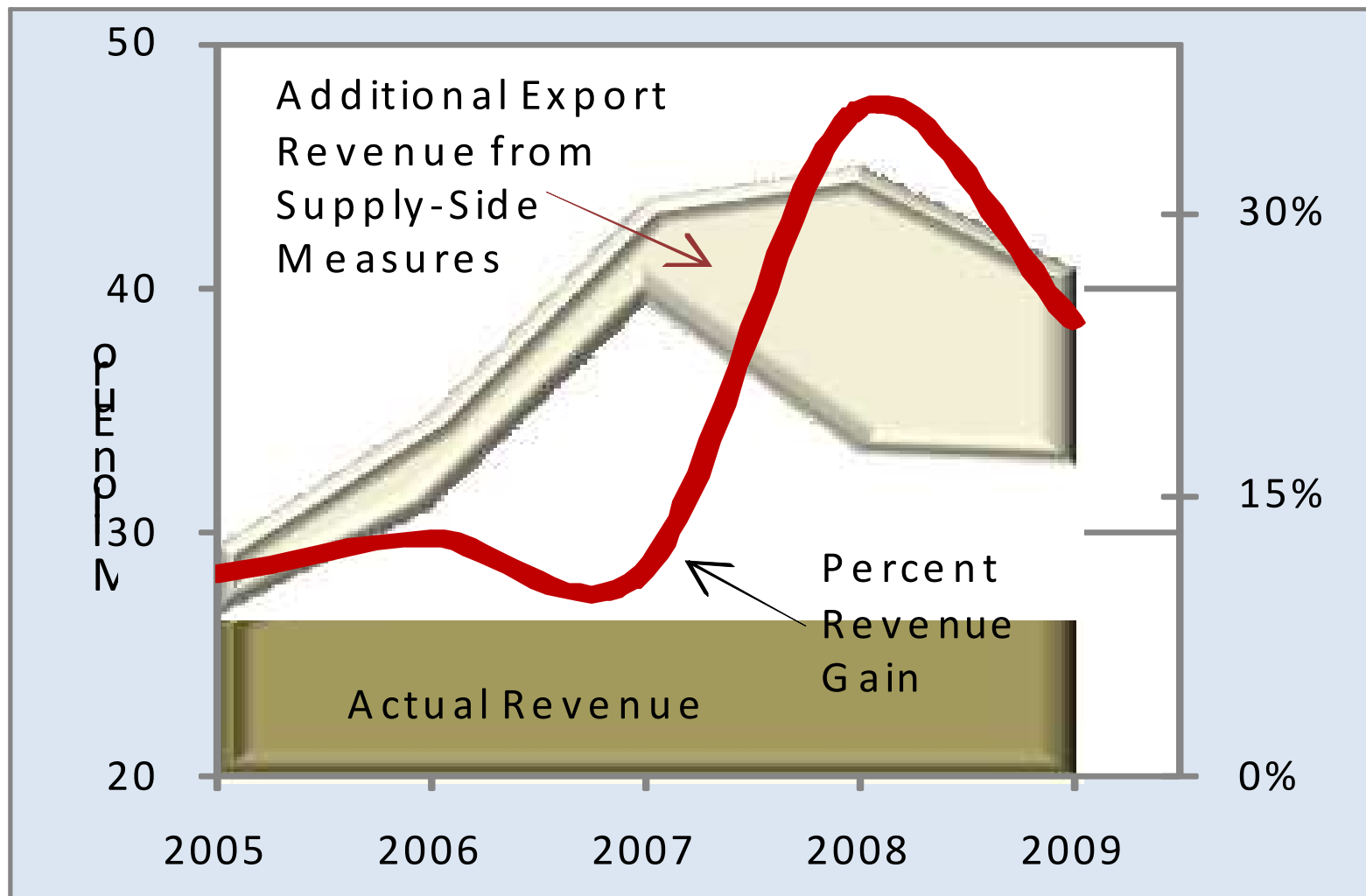
Figure A2.4: EU Fishery imports, actual 2000-2009 and forecast 2010-2015



Source: Projections by the Study Team based on econometric estimates and assumptions about economic activity from IMF, World Economic Outlook database.

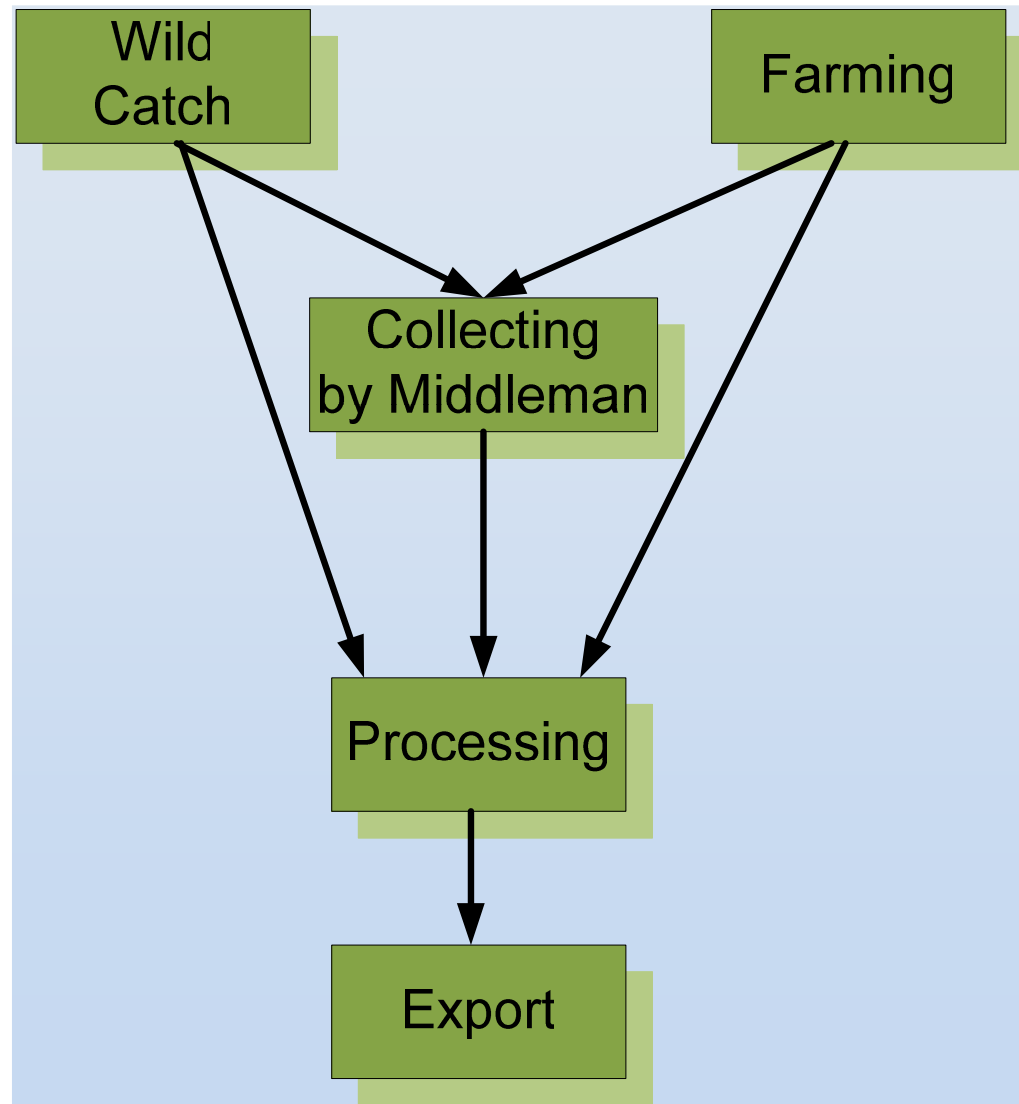
# Opportunities to Regain Market Shares:

Actual and Potential Export Earnings from Remedial Supply-side Measures in Fisheries Industry, 2005-2009

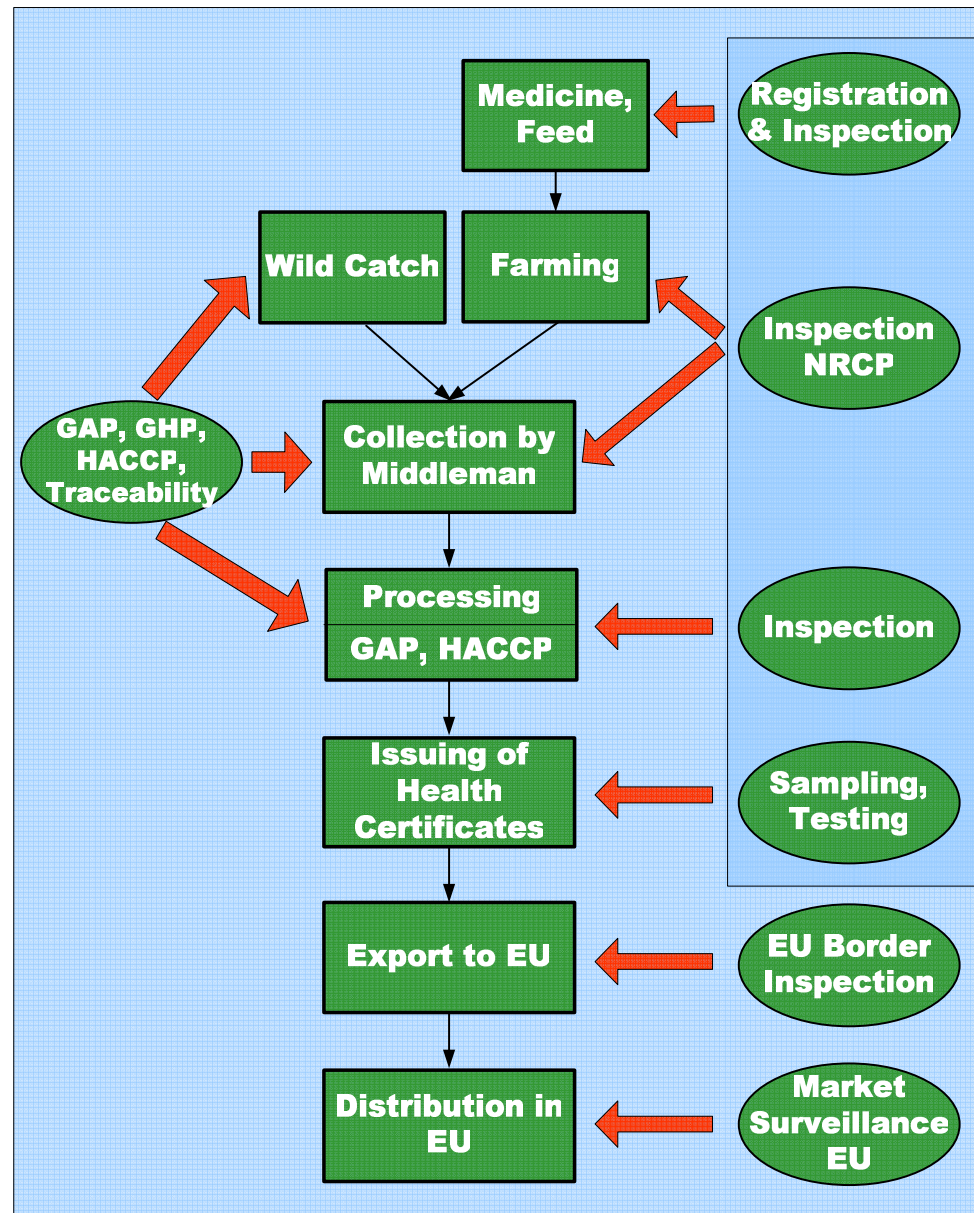




# General Fishery Process Flow



# FOOD QUALITY AND SAFETY ASSURANCE



# Main Issues

- *GAP and GHP in Farms and Middlemen*
- *Quality in Processing Companies*
- *Management Processes in MMAF and Provincial Authorities*
- *International Recognition of Laboratory Tests*
- *Currently not insufficient amount of Shrimp*
- *Large untapped potential exports to EU market*

*Terima Kasih*