

FREE-EMS SHRIMP INDUSTRY



WHAT'S INSIDE

Indonesia is one of the world's major shrimp exporting countries. The government is paying great attention to the health factor of shrimp farms taking lessons from a disease outbreak in the 1980s which brought down a blooming shrimp industry. Such cautious efforts have been fruitful as Indonesia is now among a few countries free of the Early Mortality Syndrome (EMS) disease which has affected many shrimp producing countries, mainly in Asia and Latin America.

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Ditjen PEN/MJL/04/I/2014

Dear Valued Readers,

The year 2014 has already come. Another history in the making. In this New Year, we hope you to be more successful and happier in both your social and business circles.

As in the previous years, the year of 2014 also provides other potentials and challenges in the international business context. The more information we have, the more opportunities and successes we will get, especially in the trade sector. Therefore, the Directorate General of National Export Development (DGNED) of the Indonesian Ministry of Trade keeps publishing the Export News bulletin as part of its commitment to facilitate and underpin Indonesian businesses to enhance their export performances.

The information provided in the Export News bulletin consisting of both product and market informations. In this January edition, we bring to you information on shrimp as one of Indonesian primary export commodities. Shrimp is a product that has high economic value in both domestic and international markets. Thus, editorial staff at DGNED conducted market analysis to get actual and factual progress of shrimp industry globally. Simultaneously, it is also influential in rebuilding the glory of Indonesian shrimp industry which was ruined in the 1980s.

Currently, a number of shrimp exporting countries in the world is dealing with health issue. There is an epidemic of the Early Mortality Syndrome (EMS), which infects shrimp in some countries. This condition has made major shrimp importing countries to strictly monitor shrimp products from certain countries. Since Indonesian shrimp is free from the disease, it is very beneficial to boost the export value of Indonesian shrimp. Indonesian exporters obviously have more opportunities to meet the world's high demand.

To sum up, the DGNED as a government institution fully supports the program to develop shrimp industry. Other than improvement in infrastructure, improvement is also required in terms of marketing ability through effective promotion activities. At this point, the DGNED is definitely the appropriate partner for local exporters to cooperate in increasing shrimp export performance.

Thank You

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hot issue

HEALTH QUALITY CONTROL OF LOCAL SHRIMPS

Currently, shrimp industries in a number of countries are dealing with a problem of health quality. The Early Mortality Syndrome (EMS), or Acute Hepatopancreatic Necrosis Syndrome (AHPNS), has infected shrimps in many countries, mostly

in Asia and Latin America. In addition to cases of EMS, inappropriate method in shrimp farming can also bring negative impacts on the quality of local shrimps. The use of uncontrolled antibiotics, for example, may influence the shrimp's health quality.

HEALTH QUALITY CONTROL OF LOCAL SHRIMPS

In such cases, it is the role of the National Residue Control Plan (NRCP) to educate shrimp farmers not to overuse antibiotic and other chemical ingredients. From this point, the government's role is to control healthy environment in embankments and ponds so the quality of Indonesian shrimps can be maintained to meet international standards.

Another effort to improve the quality of Indonesian shrimps is by improving the infrastructure of shrimp embankments and ponds. This is based on previous findings that high metal content inside shrimp's body will also influence shrimp health quality.

The Indonesian government has issued a number of regulations banning shrimp imports from countries where there are EMS cases to protect the national shrimp industry. The step is taken to convince international buyers that Indonesia is a supplier of healthy shrimp commodities. It is important to remember that the governments and consumers in major countries are greatly concerned about the health and safety of foods including shrimps.

On July 12, 2001, the Indonesian government officially introduced a good quality shrimp seed, locally known as Vaname Nusantara or VN-1, a variety of Pacific white shrimp (*Litopenaeus vannamei*). This seed is dispatched to increase the production capacity of local shrimp farms. VN-1 is believed to be able to compete in the global shrimp markets thanks to its good quality.

GLOBAL MARKET DEMAND



Global shrimp supply for the international market has been reduced due to EMS with a number of shrimp importing countries have determined countries of origin which are banned to enter the market. As Indonesian shrimps have declared to be free from common diseases, such as EMS, there are vast export opportunities for Indonesian shrimp farmers and producers to meet the demand and grabbed the available market potentials. Once the quality and quantity is satisfactory, the aim to increase shrimp export can be realized.

One on going critical issue is the efforts by certain countries to export their shrimps to major markets by distributing through Indonesia. This needs to be anticipated in order to keep Indonesia's positive image as one of the world's most recommended shrimp suppliers.

Since 2004, the European Union has rejected 34 shrimp exports from Indonesia. However, in a five-year period until 2011, the number of rejected exports was reduced to only five. The decline in rejection illustrates better condition and quality of Indonesian shrimps. The European Rapid Alert System and Food and Feed (RASFF) has proven that Indonesian shrimp does not contain prohibited antibiotics such as chromphenicol and nitrofurantoin.

Furthermore, it was reported in December 2013 that Indonesia's shrimp export to the United States grew by 100%. Thus the government is upbeat that Indonesian shrimp could dominate the US market. In addition to the US, Japan and the EU are also the primary export destinations for Indonesian shrimp. However, to be able to enter major overseas markets, it is important to take into account the applicable requirement and regulations. It is also important to upgrade the capabilities of shrimp farmers to effectively promote their products.

The demand for global shrimp market is huge. On the other side, as one of the flagships in the fishery sector, Indonesian shrimp industry has huge opportunities to be the world's largest shrimp supplier. To win the competition, producing shrimps with good quality is a must while the farmers must also have skills in negotiating and promoting their products.



SHRIMP INDUSTRY IN INDONESIA



SHRIMP IS ONE OF SUPERIOR COMMODITIES IN INDONESIAN AQUACULTURE INDUSTRY.

Its high economic value and significant market demand make this sector keeps growing. Both domestic and international markets provide high demands for shrimps. Nowadays, the Indonesian government aims to alter the image of shrimp as a source of high cholesterol which is not good for health, to become a source of phytosterol which is needed by humans. At the end, it is expected that local consumption of shrimp can be increased.

The government intervention is needed in this sector in terms of State Budget allocation to further develop the industry, such as revitalizing shrimp embankments. In the previous year, allocation from the State Budget was used to revitalize shrimp industry in 28 regencies in six provinces which are main shrimp producers: East Java, Center Java, South Sulawesi, West Nusa Tenggara and North Sumatra covering an area of 504 hectares of land.

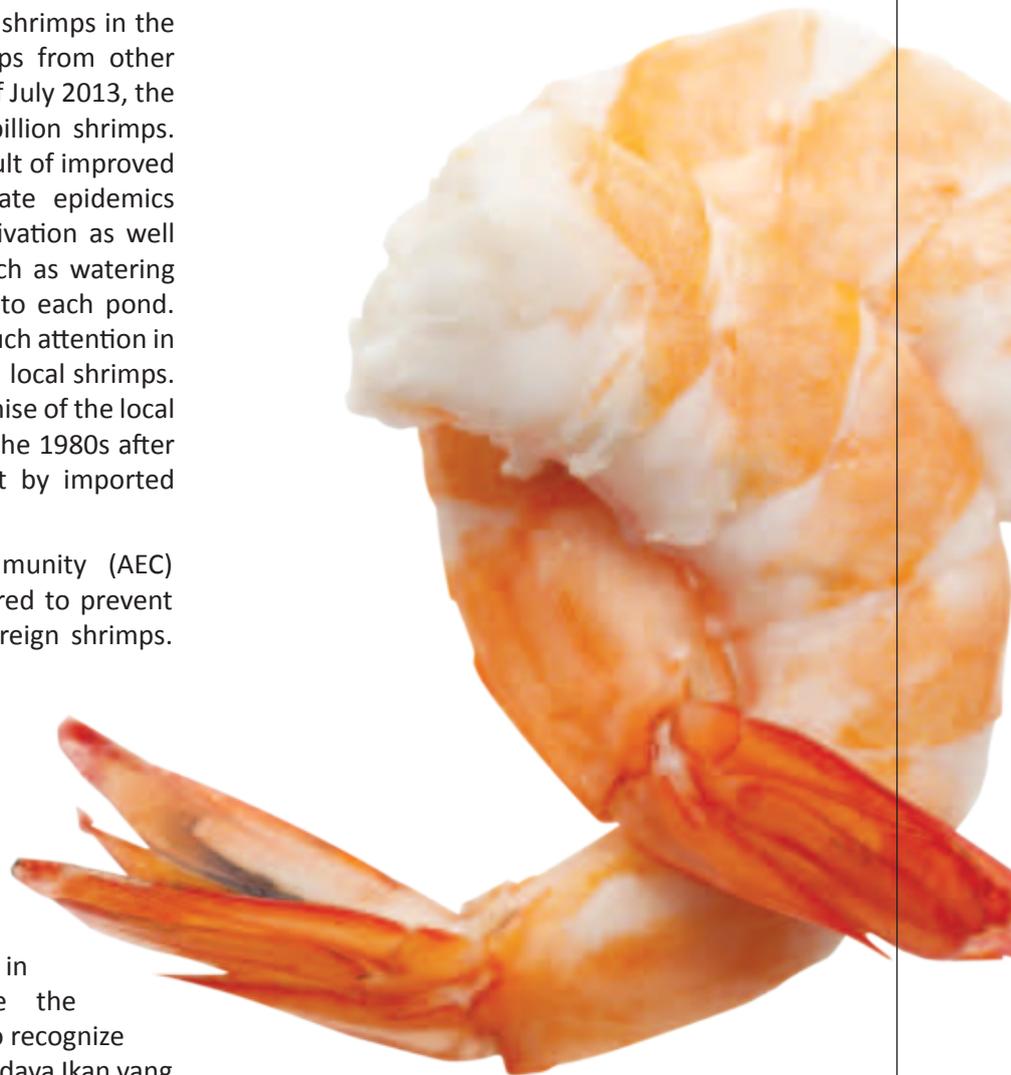
Indonesia has seen increasing shrimp production in the past five years. The estimated shrimp productions were 409,590 tons, 338,060 tons, 380,972 tons, 400,385 tons and 415,703 tons respectively from 2008 to 2012. In 2013, the government set a target of 608,000 tons of shrimp while the target for 2014 is 699,000 tons. In order to achieve the target, high quality seeds and excellent spawners or breeding shrimps are required to ensure the success of the ongoing shrimp cultivation. Thus, the government dispatches VN-1 as the potential spawner.

VN-1 originates from Indonesian and is believed to be competitive against imported shrimps in the domestic market as well as shrimps from other countries in the global market. As of July 2013, the total production of VN-1 was 2.4 billion shrimps. The impressive number was the result of improved technology being used to anticipate epidemics and other problems in shrimp cultivation as well as improving the infrastructure, such as watering system to guarantee water supply to each pond. The Indonesian government pays much attention in preventing the spread of diseases in local shrimps. The concern was sparked by the demise of the local shrimp industry from its heyday in the 1980s after being stricken by diseases brought by imported shrimps.

With the ASEAN Economic Community (AEC) starting in 2015, the VN-1 is prepared to prevent the entry of diseases carried by foreign shrimps. VN-1's high production capacity is expected to meet national shrimp demands so as to decrease the number of imported shrimps. VN-1 is cultivated as the national self-sufficient seeds and spawner shrimp.

To elevate competitiveness in global market and AEC market in particular, shrimp farmers have the opportunity to obtain a certificate to recognize the implementation of the Cara Budidaya Ikan yang Baik (CBIB), or Good Aquaculture Practices, such as acquired by UD Dwi Devi Lancar in Tuban, East Java. This certificate is issued to ensure the sustainability of VN-1 as the symbol of the current glory of national shrimp industry.

In addition, VN-1 shrimp is also non-residual and free from Early Mortality Syndrome (EMS) or Acute Hepatopancreatic Necrosis Syndrome (AHPNS). The EMS is an epidemic in many shrimp exporting countries in Asia and Latin America. To maintain healthy environment for shrimp habitats in Indonesia, the government also strictly monitors the issuance of shrimp import licenses. All imported shrimps have to pass through scientific inspection.





Indonesian shrimp in international trade activities

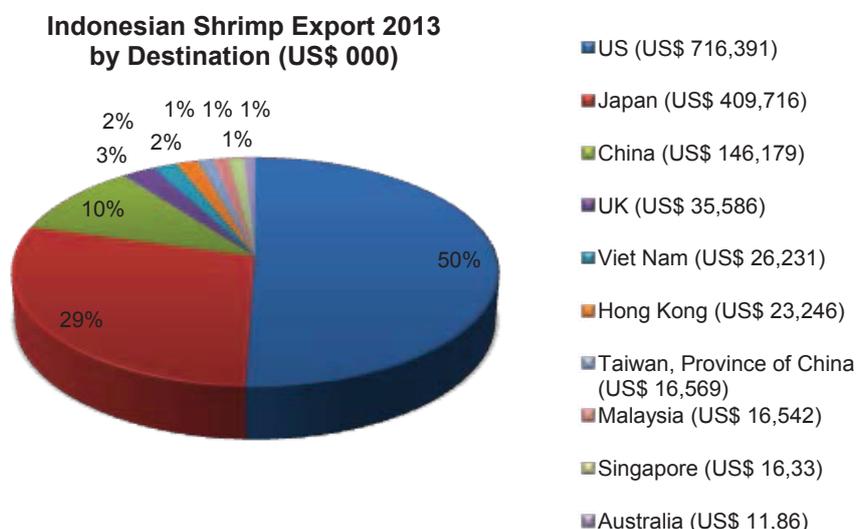
Indonesia is still one of the world's major shrimp suppliers. Data from Central Statistics Agency (BPS) shows that Indonesian shrimp export grew significantly at a rate of 50% from 2009 until 2013. Moreover, with EMS issue, healthy Indonesian shrimp has become the most recommended product in the global market.

Other than the good quality of local shrimps, increasing export of Indonesian shrimps was also helped by the global EMS epidemic. The epidemic has reduced the world's shrimp production volumes. In this situation, Indonesian shrimp farmers and exporters have huge opportunities to meet the international market demands, because some exporting countries can not supply shrimp to a number of major countries such as the United States, Japan and the European Union. The total world trade for shrimp is estimated at US\$25 billion annually. Meanwhile, shrimp export from Indonesia to the world from 2009 until 2013 were recorded at US\$845.01 million, US\$939.27 million, US\$1.16 billion, US\$1.20 billion and US\$1.48 billion respectively.

In December 2012, Indonesian was one of seven exporting countries to the United States which were accused of conducting unfair trade by subsidizing shrimp production in domestic sector. To address this Countervailing Duties (CVD) case, the US Department of Commerce carried out a field verification in Jakarta and Lampung in August 2013. This investigation resulted in a final decision which declared that there was no indication of subsidies for exported shrimps in Indonesia. Hence, the Indonesian Vice Minister of Trade, Bayu Krisnamurthi stated Indonesian exports of shrimp was free from subsidy allegations. Bayu also said that the positive result was beneficial to significantly boost Indonesian shrimp export performance to the US market.

Most of Indonesian shrimps are exported to the United States with an export value of US\$716.39 million in 2013. The second and third largest markets were Japan and China with an export value of US\$409.72 million and US\$146.18 million respectively. Other countries in the Top 10 export

Indonesia Shrimp Export Volume 2009-2013 (US\$ 000)



destinations for Indonesian shrimps in 2013 were the United Kingdom, Viet Nam, Hong Kong, Taiwan, Malaysia, Singapore and Australia.

Although the production of Indonesian shrimps is significant, it is however still inadequate for certain conditions to meet the domestic demand. Therefore, Indonesia still imported shrimps from abroad. In 2013, the main importing countries in Indonesia were Canada, Russian Federation, the United States, India, China, Australia, Indonesia (Batam), Greenland, Vietnam and Japan.

2013, the demand of Indonesian shrimps grew by 100 percent.

This market potentials should be responded by ensuring the sustainability of national shrimp production. Hence, the area of shrimp embankments need to be enlarged. The possibility of EMS entry should also be anticipated by establishing certain regulations in order to protect national shrimp industry. In 2014, the government set a target that shrimp production volume to reach 699,000 tons,

**Indonesian Shrimp Imports 2009-2013
(US\$ 000)**

NO	COUNTRY	2009	2010	2011	2012	2013
		Value In US\$ 000				
1	Canada	195	7.051	14.968	16.788	20.265
2	Russian Federation	667	517	9.677	4.961	13.944
3	United States	598	1.719	9.086	14.440	12.954
4	India	638	2.682	6.394	7.476	5.239
5	China	3.702	2.640	2.086	3.903	4.432
6	Australia	76	164	73	1.223	2.830
7	Indonesia (Batam)	2.611	1.684	2.294	5.459	2.474
8	Greenland	-	-	1.210	3.236	1.038
9	Viet Nam	532	1.677	1.746	1.266	814
10	Japan	937	874	2.040	64	781

Prospect of Indonesian shrimp export in 2014

The United States, Japan and Europe Union are still categorized as the main export destinations for Indonesian shrimps in 2014. As explained above, healthy Indonesian shrimps and declining ability of other countries stricken by EMS epidemic have provide huge opportunities for Indonesian shrimp exporters to grab higher profits. Until December

an increase of 14% when compared to production in 2013. The target of 699,000 tons consisted of 188,000 tons of tiger shrimps and 511,000 tons of VN-1 shrimps.

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Fax : (62-21) 57930282
E-mail : alfa@sorong.wasantara.net.id,
alfajkt@alfakurnia.com

Products : Crustaceans, whether in shell or not, Molluscs,
Whether in Shell or Not, Live, Fresh or Chilled,
Shrimps (Fresh, Frozen)

SEKAR BUMI Tbk, PT

Plasa Asia (d/h ABDA) Lt. 2 Zona A,
Jl. Jend. Sudirman Kav. 59 - 12190 D. K. I. Jakarta
Phone : (62-21) 51401122
Fax : (62-21) 51401212
E-mail : skbm@sekarbumi.com, marketing@sekarbumi.com,
skbm@sekarbumi.com
Products : Fishery/Marine Products, Shrimps (Fresh, Frozen)

MEDAN TROPICAL CANNING & FROZEN INDUSTRIES, PT

Jl. K.L. Yos Sudarso Km. 10,5 Desa Mabar,
Kawasan Industri Medan I (PO Box 1427 Medan 20000) - 20242
Sumatera Utara
Phone : (62-61) 6850038
Fax : (62-61) 6851330, 6851973
E-mail : mtcfi@indosat.net.id, gindra@indo.net.id
Products : Chlamys, fresh or chilled, Crab In Airtight
Containers, Crabs, frozen, Cuttle Fish Frozen,
Other Aquatic Invertebrates In Airtight Containers,
Other Aquatic Invertebrates in Other Containers,
Shrimps (Fresh, Frozen), Shrimps and Prawns in
Airtight Containers, Snail, Other Than Sea Snails
(Fresh, chilled or frozen), Squid, frozen

TOXINDO PRIMA, PT

Jl. Lingkar Timur No. 5 RT.04/RW.02, Tegalkamulyan - 53215
Jawa Tengah
Phone : (62-282) 537966
Fax : (62-282) 537965
E-mail : tox@ygy.centrin.net.id, sudirwan.k@gmail.com
Products : Fish, frozen, Shrimps (Fresh, Frozen)

ALTER TRADE INDONESIA, PT

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Phone : (62-31) 8911230
Fax : (62-31) 8911231
E-mail : diah@atina.co.id
Products : Shrimps (Fresh, Frozen)

SEKAR LAUT Tbk, PT

Jl. Raya Darmo No. 23-25 - 60265 Jawa Timur
Phone : (62-31) 5671371
Fax : (62-31) 5672318, 5676240
E-mail : sekarlaut@sekar.co.id, info@sekarlaut.com
Products : Completed Feed for Shrimp, Kerupuk Of Shrimps,
Shrimps (Fresh, Frozen)

TITANI ALAM SEMESTA, PT

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Jawa Timur
Phone : (62-31) 8433615
Fax : (62-31) 8433761
E-mail : cs@pratamaabadigemilang.com
Products : Kerupuk Of Shrimps

KARYA KENCANA SUMBER SARI, PT

Jl. Raya Sumorame 39, Candi - 61271 Jawa Timur
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Fax : (62-31) 8962331
Products : Kerupuk Of Shrimps

PANCA MITRA MULTIPERDANA, PT

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Fax : (62-31) 5459161
E-mail : pmmp@sby.dnet.net.id
Products : Octopus Frozen, Shrimps (Fresh, Frozen)

GRAHAMAKMUR CIPTAPRATAMA, PT

Jl. Industri No. 29 A, Buduran - 61252 Jawa Timur
Phone : (62-31) 8961062, 8945140, 8945141, 8945142
Fax : (62-31) 8965598, 8945143
E-mail : saimi@surabaya.indokom.co.id
Products : Shrimps (Fresh, Frozen)

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Phone : (62-31) 3976351
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Product : Frozen Shrimp, crab meat, frozen fish



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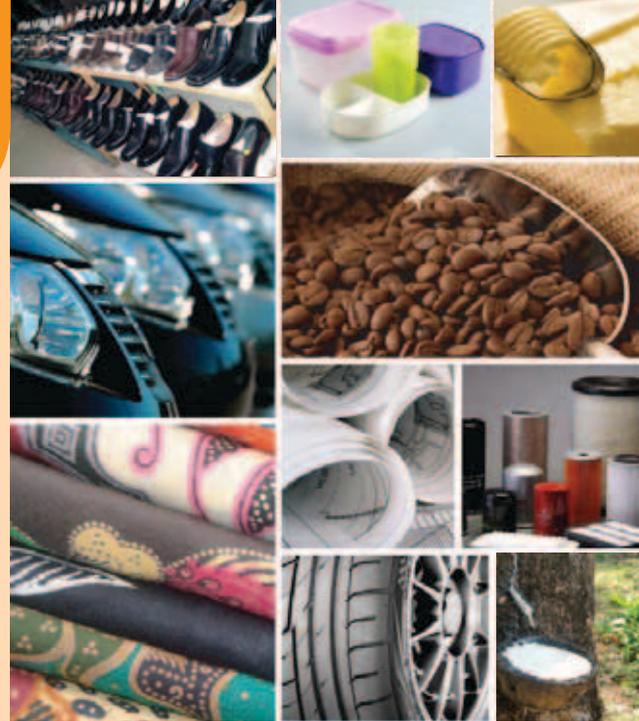
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