

TOWARD MORE COMPETITIVE OF INDONESIAN FISHERIES PRODUCTION IN INTERNATIONAL MARKET

by Asmi Citra

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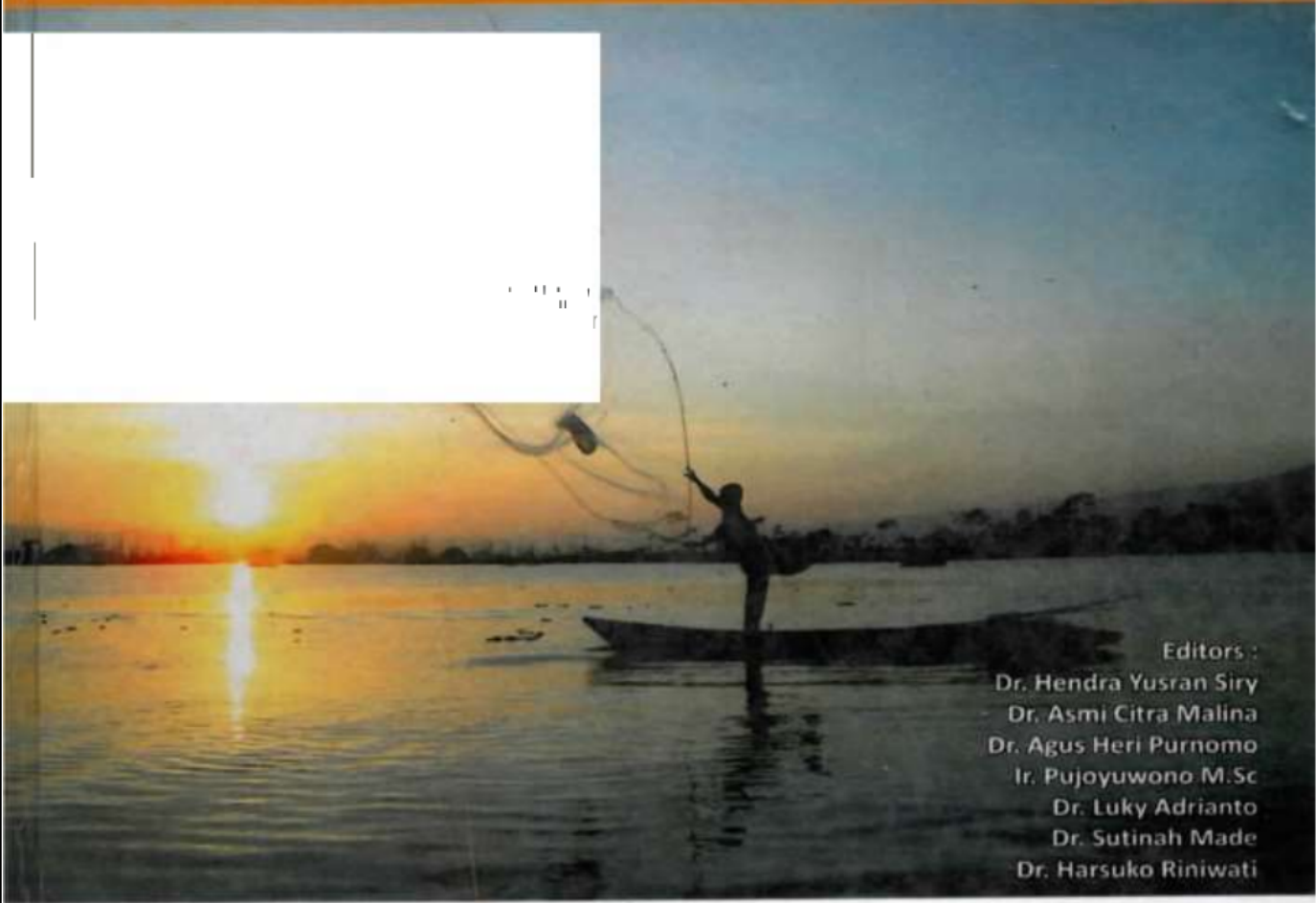
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Dr. Hendra Yusran Siry
Dr. Asmi Citra Malina
Dr. Agus Heri Purnomo
Ir. Pujoyuwono M.Sc
Dr. Luky Adrianto
Dr. Sutinah Made
Dr. Harsuko Riniwati

ENHANCING INDONESIAN FISH PRODUCTION AND COMPETITIVENESS IN INTERNATIONAL MARKET



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**ENHANCING INDONESIAN FISH PRODUCTION AND
COMPETITIVENESS IN INTERNATIONAL MARKET**

based on papers presented at the International Seminar on Indonesian
Fisheries Development 2010 at Hassanudin University, Makassar, 22
November 2010

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Copy-editor :

Nurhendra

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Jl. K.S Tubun • Petmburan VI Jakarta Pusat
Phone: (021) 536 50162 - 53650475 - Fax: (021) 536 50159
E-mail: pl.Sosek@gmail.com
web: www.bbrse.kkp.go.id



Indonesian Marine and Fisheries Socio-Economics Research Network

c/o Jl. K.S Tubun • Petmburan VI Jakarta Pusat
Phone: (021) 536 50162 - 53650475 - Fax: (021) 536 50159
E-mail : pl.sosek@gmail.com
web : <http://imlsem.wordpress.com/>

Faculty of Fisheries and Marine Science, Hasanuddin University

Jl. Perintis Kemerdekaan KM. 10, Kampus Tamalanrea, Makassar 90245, Indonesia
Web : www.fikp.unha.ac.id

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TOWARD MORE COMPETITIVE OF INDONESIAN FISHERIES PRODUCTION IN INTERNATIONAL MARKET

Hendra Yusran Siry¹, Asmi Cltra Malina², Pujoyuwono¹, Agus Herl Purnomo¹,
Luky Adriantoi and Sutinah Made¹

^{1,3,4} Research Center for Marine and Fisheries Social Economic

Ministry of Marine Affairs and Fisheries

Jl. K.S. Tubun Petamburan VI, Jakarta 10260, Indonesia

^{2,5} Faculty of Fisheries and Marine Science, Hasanuddin University

Jl. Perintis Kemerdekaan KM. 10, Kampus Tamalanrea, Makassar 90245, Indonesia

⁵ Center for Coastal and Marine Resources Studies, Bogor Agriculture University

Campus IPB Baranangsiang, Jl. Raya Pajajaran No.1, Bogor 16144, Indonesia

ABSTRACT

This paper discusses challenges of Indonesian fisheries development in enhancing its fish production and competitiveness in International market. It is an Introduction of a compilation of research papers presented at the International Seminar on Indonesian Fisheries Development: Enhancing Fish Production and Competitiveness In International Market in Makassar, South Sulawesi on 22 - 23 November 2010 that was jointly organized by the Research Center for Marine and Fisheries Socioeconomics (RCMFSE), Ministry of Marine Affairs and Fisheries (MMAF), Faculty of Fisheries and Marine Science, Hasanuddin University and the Indonesian Marine and Fisheries Socio-Economics Research Network (IMFISERN).

This paper examines several improvements and consequences to make Indonesian fisheries product more competitive in International market, that include improvement post-harvest and safety of fish and fisheries products by improving of fish handling, processing and preservation, improving traditional products - quality, marketing and trade and enhancing quality, safety and control systems for fish products. This paper suggests several alternative and creative ways that can be useful to improve competitiveness of Indonesian fisheries products.

Keywords: Indonesian fisheries products, competitiveness, international market, post-harvest and safety

WHY INDONESIAN FISHERIES DEVELOPMENT MATTER

¹ Rising wealth and emerging focus on healthy foods generate a rising wave of demand for fish as well as result to the increased price for fish. By 2025, the worldwide demand for fish will be 40-60 million tons annually to maintain per capita consumption at current levels. In Indonesia, demand for more fishes and its derivative products continues to increase in conditions of heavily depleted of fish stocks and resources to keep pace with exploding population. Similarly, the growing fish consumption in Indonesian which increases from 22.4 kilograms to almost kilograms kg annually in 2006, is facing the stagnant of capture fisheries production - as many fish stocks are fully exploited or overexploited. Currently, there are some dramatic changes in fisheries industry in terms of requirements to guarantee good quality, healthy products and other aspects that could indicate that the product is safe for human consumption (SEAFDEC, 2010).

Increasing demands on fish production emerges with the requirement to the production and production methods and producers to guarantee/certify that all steps of the production are in line with acceptable environmental standards and that the production can be sustained including important habitats. There are several considerable challenges to fulfil these growing demands in Indonesia such as (i) low growth and productivity; (ii) environmental degradation and pollution; (iii) lack and inaccessibility of credit for poor or small-scale fish farmers; (iv) high costs of imported production inputs; (v) absence of social preparation, inefficient extension services, and lack of post-production facilities and marketing infrastructure; and (v) conflicts in water usage. Failures to manage these challenges will risk the enhancement of fish production and its competitiveness. It then potentially harms the future of fish supply which leads to the distraction to food security.

At the same time, the alarming nature of fish production and competitiveness in international market has attracted more attention on this issue. Available information shows to be successful in international market, Indonesia has to have multi-faceted strategies to response and conduct precautionary approaches as well as market intelligence to unravel those shrouded obstacles factors on international market. In this sense, Indonesia fisheries development is a matter to accelerate the efforts to the trends and emerging requirements that concerns on quality and environmental sustainability as well as certifying fair trade standards and social and labor related standards.

RESPONSE TO FISH PRODUCTION AND COMPETITIVENESS

To response the trends and emerging requirements for fish production and competitiveness, Indonesia is currently strengthening its capacity and capability for fisheries processing and quality control. Indonesia has 500 units established processing unit, 238 Fish Inspector (41 National Fish Inspectors and 197 Provincial Fish Inspectors), 22 accredited laboratories that can comply with EU requirements (Hutagalung, 2011). These supports and facilities are also important to address requirements on quality and environmental sustainability that are imposed by several major fish export countries (Table 1).

Table 1. Fish requirements quality control by several major countries/export destinations.

No.	Country	Quality and Safety	Sustainability
1	USA	HC, HACCP Certificate, GMP Certificate, Low-Acid Canned Food and Acidified Foods Regulations, COOL (Country of Origin Labeling) Requirements, Shrimp Exporters/Importers Declaration (DSP 2031)	Eco-label, Marine Stewardship Council (MSC)
2	Japan	HC, HACCP Certificate, GMP Certificate, certificate of origin	IOTC (COO), Eco-label, Marine Stewardship Council (MSC)
3	EU	HC, HACCP, PRPs/GMP Aquaculture products: negative residue CHP, nitrofurans tetracycline CD 236 - 660 for heavy metals and histamine below the threshold for capture fishery product UE Inspection findings 2009	ICCAT, catch Certification, MSC
4	Russia	GMP SSOP Certificate, HACCP	
5	China	GMP SSOP Certificate, HACCP	
6	South Korea	GMP SSOP Certificate, HACCP	CDS-SBT
7	A S E A N	Singapore, Malaysia and Vietnam	Catch Certification for Raw
	Countries	HC (EU requirements)	Material to be exported to EU

Source: Hutagalung (2011).

There are several improvements to make Indonesian fisheries product more competitive in international market. Indonesia needs to improve its post-harvest and safety of fish and fisheries products by improving of fish handling, processing and preservation, improving traditional products - quality, marketing and trade and enhancing quality, safety and control systems for fish products. These improvement



consist of consequences such as (i) strengthening capacity building through awareness and continue/accelerate training on post-harvest and sustain technical support to extension services, (ii) creating National Development Plan for standards and guidelines for vessels (design and construction of fishing vessels, hygiene) and all aspects of improving fish handling, processing and preservation in national master plans, (iii) upgrading infrastructures on handling/processing/preservation and (iv) applying waste/by-product utilization. Incentives and available accessible credit and marketing are important support systems to these improvements .

Several alternative and creative ways can be useful to improve competitiveness of Indonesian fisheries products. Diversification of raw materials for traditional products and development and promotion of indigenous packaging materials can benefits for the products. New promotional strategies such promoting naturally preserved, low carbon footprint, heritage, customs and traditions can brings positive impacts and images for the product. At the same time, implementing control systems in processors supplying to domestic markets with more resources into enforcement and traceability systems to whole supply chain, can increase quality, safety and control systems for Indonesian fisheries products.

All these improvement calls for applicable solutions on efforts to response the trends and emerging requirements for fish production and competitiveness, as well as on how to formulate research based policies on marine and fisheries development by enhancing fisheries production and competitiveness through sustainable and responsible fisheries practices. To foster discussion, information exchange, and communication on fisheries production enhancement and its competitiveness, Research Center for Marine and Fisheries Socioeconomics (RCMFSE), Ministry of Marine Affairs and Fisheries (MMAF) in collaboration with Faculty of Fisheries and Marine Science, Hasanuddin University and the Indonesian Marine and Fisheries Socio-Economics Research Network (IMFISERN) or locally known *Jaringan Riset Sosial Ekonomi Kelautan dan Perikanan* organized the International Seminar on Indonesian Fisheries Development: Enhancing Fish Production and Competitiveness in International Market in Makassar, South Sulawesi on 22 - 23 November 2010.

The aims of this seminar are (i) to promote discussion and best-practices exchange among researchers, policy makers and practitioner on marine and fisheries development, (ii) to explore and exchange scientific information on the emerging issues in fish production processing and trading as well as resources sustainability and (iii) to collaborate, explore, and develop cooperation between the participants

in the future. The expected outputs of this seminar are strategy and formulation on research based policy on the sustainable and responsible marine and fisheries sector development.

This seminar was formally opened by the Rector of Hasanudin University and about 200 participants consist of lecturers, students, researchers, government officers, private companies from fisheries and marine industries, fisheries and aquaculture-based entrepreneur, Non Government Organizations (NGOs) and public societies have been participated. Several papers presented at this seminar are selected to be part of this book, as outcomes of the seminar.

ABOUT THIS BOOK

This book is a compilation of research paper presented at the International Seminar on Indonesian Fisheries Development: Enhancing Fish Production and Competitiveness in International Market. It addresses major themes related to fisheries production and competitiveness. It examines meticulously Indonesian fisheries development empirically in the context to enhance its fish production and competitiveness in international market. This book intends to serves as a reference for those who wish to research further on respective topics, besides acting as wake-up call on the importance of finding ways for Indonesian fisheries in competitive market.

Contents of this book are relevant to the current initiative of the Ministry of Marine Affairs and Fisheries (MMAF) as the one of major producers in fisheries and marine products by 2015. Furthermore, documenting empirical research findings on fish production and competitiveness is part of addressing the current challenges of the MMAF to pursuit its missions. There are 60 selected papers in this book.

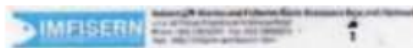
Themes of this book cover following on (i) fish production that concern on food production technology, product value improvement and food policy, (ii) resource and environment including biotechnology of resources utilization, monitoring technology and observation of resources and environment), social ecological system, social resilience, governance and policy on resources and environmental preservation, (iii) fish trade and market and competitive advantage offish market. Following chapters in this book examines conditions, efforts, obstacles and prospects of Indonesian fisheries production systems in an emerging trends and international market from several perspectives of socio-economics, aquaculture and management, capture fisheries and oceanographic, and fish processing technology and biotechnology.

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Indonesia fisheries development contains challenges to accelerate the efforts to the trends and emerging requirements that concerns on quality and environmental sustainability as well as certifying fair trade standards and social and labor related standards. Apart of required several improvements, it needs several alternative and creative ways to improve competitiveness of Indonesian fisheries products.

This book is a compilation of research paper presented at the International Seminar on Indonesian Fisheries Development: Enhancing Fish Production and Competitiveness in International Market. It addresses major themes related to fisheries production and competitiveness. It examines meticulously Indonesian fisheries development empirically in the context to enhance its fish production and competitiveness in international market. This book intends to serves as a reference for those who wish to research further on respective topics, besides acting as wake-up call on the importance of finding ways for Indonesian fisheries in competitive market. Contents of this book are relevant to the current initiative of the Ministry of Marine Affairs and Fisheries



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