INDONESIAN CHAMBER OF COMMERCE AND INDUSTRY

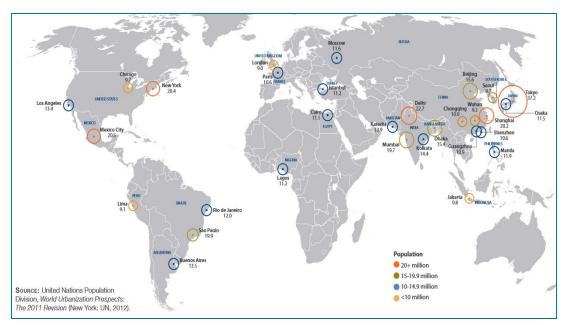


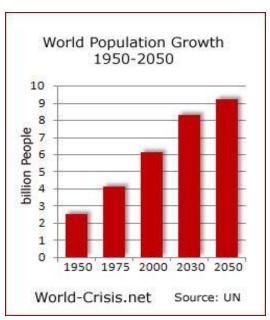
KADIN INDONESIA

Mr. Yugi Prayanto
The Vice Chairman of Indonesian Chamber of Commerce and Industry
MARINE AFFAIR and FISHERIES SECTOR

WORLD POPULATION AND FOOD CONSUMPTION DEMAND

The world population in 2013 has reached 7.1 billion people. It is estimated that the population in 2030 may rise to 8.30 billion people and is estimated in 2050 will reach to 9.15 billion people.





60% of the world population reside in Asia. Indonesia which is the third most populous country in Asia after China and India,

Indonesia is the fourth rank within the top ten most populous countries in the world after China, India and the United States of America. This creates concern for Indonesia on the food availability in the future.

TOP TEN COUNTRIES WITH THE HIGHEST POPULATION					
#	Country	2000 Population	2010 Population	2012 Population	2050 Expected Pop.
1	<u>China</u>	1,268,853,362	1,330,141,295	1,343,239,923	1,303,723,332
2	<u>India</u>	1,004,124,224	1,173,108,018	1,205,073,612	1,656,553,632
3	United States	282,338,631	310,232,863	313,847,465	439,010,253
4	Indonesia	213,829,469	242,968,342	248,645,008	313,020,847
5	Brazil	176,319,621	201,103,330	193,946,886	260,692,493
6	<u>Pakistan</u>	146,404,914	184,404,791	190,291,129	276,428,758
7	Nigeria	123,178,818	152,217,341	170,123,740	264,262,405
8	Bangladesh	130,406,594	156,118,464	161,083,804	233,587,279
9	Russia	146,709,971	139,390,205	142,517,670	109,187,353
10	<u>Japan</u>	126,729,223	126,804,433	127,368,088	93,673,826
TOP T	EN Countries	3,618,894,827	4,016,489,082	4,096,137,325	4,950,140,178
Rest o	f the World	2,466,012,769	2,829,120,878	2,921,709,597	4,306,202,522
TOTAL World Population		6,084,907,596	6,845,609,960	7,017,846,922	9,256,342,700

NOTES: (1) The Top 10 Most Populated Countries of the World Table was updated for June 30, 2012. (2) Detailed data for individual countries may be found clicking on each country name. (3) Demographic (population) estimates for years 2000, 2010, 2012 and 2050 are based mainly on mid-year data from the <u>US Census Bureau</u> website. (4) The China population data is for the mainland only. (5) Data from the Internet World Stats website may be cited, giving the due credit and establishing an active link back to <u>Internet World Stats</u>. (6) For definitions, navigation help and methodology, see the <u>Site Surfing Guide</u>. Copyright © 2001 - 2013, Miniwatts Marketing Group. All rights reserved worldwide.

Indonesia endeavours to increase the production of food that high in carbohydrates and protein through the intensification of Agriculture, livestock and fishery industry as part of the Food Security Program.

FISHERIES INDUSTRY

As a maritime nation with 70% of the area formed by oceans, fishery is a very important sector for Indonesia. Indonesia has a high potential for fisheries industry which is reflected from the consumption of seafood as a source of protein.

TABLE AVERAGE PER CAPITA per year in Kilogram CONSUMPTION OF SELECTED FOODS IN INDONESIA, 2009-2013

N.	FOOD ITEMS	YEAR			
No.		2010	20011	2012	2013
1	Beras	90.15	89.47	87.23	85.51
2	Cow Meat	0.365	0.417	0.365	0.261
3	Broiler Meat (Chicken)	3.54	3.65	3.49	3.65
4	Fish Pish	30.48	<mark>32.25</mark>	33.89	<mark>35.10</mark>

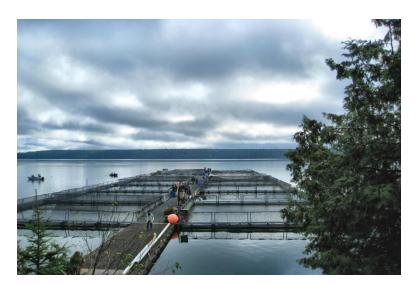
Source: National Sosio-Economic Survey, 2009-2013

Fish consumption statistic 2009-2013, Ministry of Marine affair and Fisheries of Indonesia

Capture Fishery in Indonesia has reached the maximum limit and the production cannot be increased.

Indonesian fishery will be potentially directed towards aquaculture which in the future it is expected that two third of fisheries productions will be resourced from aquaculture.

THE POTENTIAL OF AQUACULTURE





The aquaculture industry in Indonesia will be one of the biggest in the world as Indonesia is one of the largest archipelago where 70% of its area formed by ocean with coast lines of 81,400km which is the longest in the world. Therefore Indonesia has a great potential for coastline fish farming and inland aquaculture.

POTENTIAL LAND AREA OF FISH FARMING

The available area for aquaculture industry across all provinces in Indonesia:

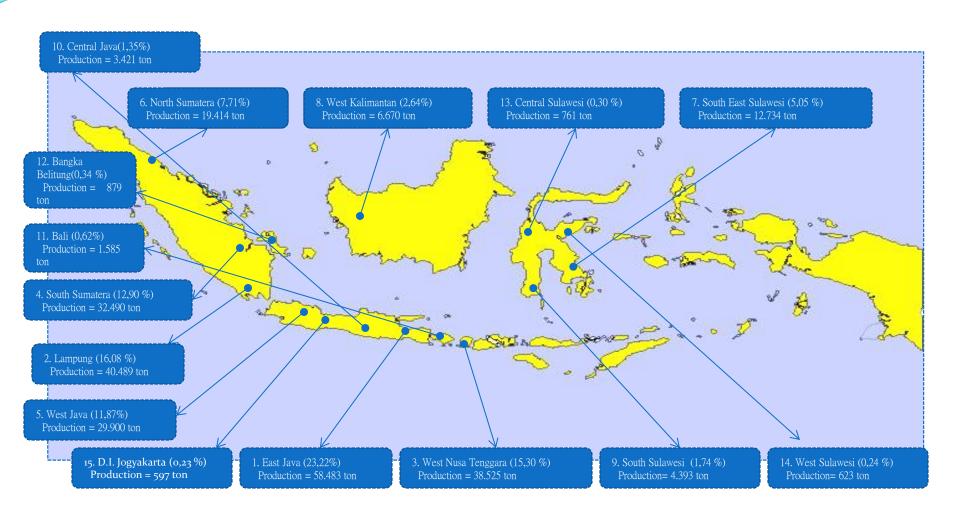
PROVINCE	TOTAL Area (Hectare)	Aqua Culture (Hectare)	FRESH WATER POND CULTURE (Hectare)	MARI- CULTURE (Hectare)
SUMATERA	5,132,623	1,004,702	144,300	3,983,621
JAWA	1,911,272	425,541	268,000	1,217,731
BALI – NUSA TENGGARA	573,029	113,441	30,100	429,488
KALIMANTAN	3,172,172	674,991	11,800	2,485,381
SULAWESI	2,400,800	412,147	61,700	1,926,953
MALUKU – PAPUA	2,859,993	332,895	25,200	2,501,898
TOTAL AREA (Hectare)	16,049,889	2,963,717	541,100	12,545,072

Examples of aquaculture commodity that are currently produced in Indonesia:

No.	COMMODITIES	2012	2012**	Achievement Production (%)
1.	Black Tiger Shrimp	117.888	139.000	84,81
2.	Vaname Shrimp	251.763	390.000	65,55
3.	Grouper Fish	11.950	11.000	108,63
4.	Snapper Fish	6.198	6.500	95,35
5.	Milk Fish	518.939	503.400	103,08
6.	Patin (Pangasius)	347.000	651.000	53,30
7.	Tilapia	695.063	850.000	81,77
8.	Carp Fish	374.366	300.000	124,78
9.	Cat Fish	441.217	495.000	89,13
10.	Gourami Fish	84.681	44.400	190,72
11.	Seaweed	6.514.854	5.100.000	127,74
	TOTAL(Tons)	9.675.553	9.415.700	102,75

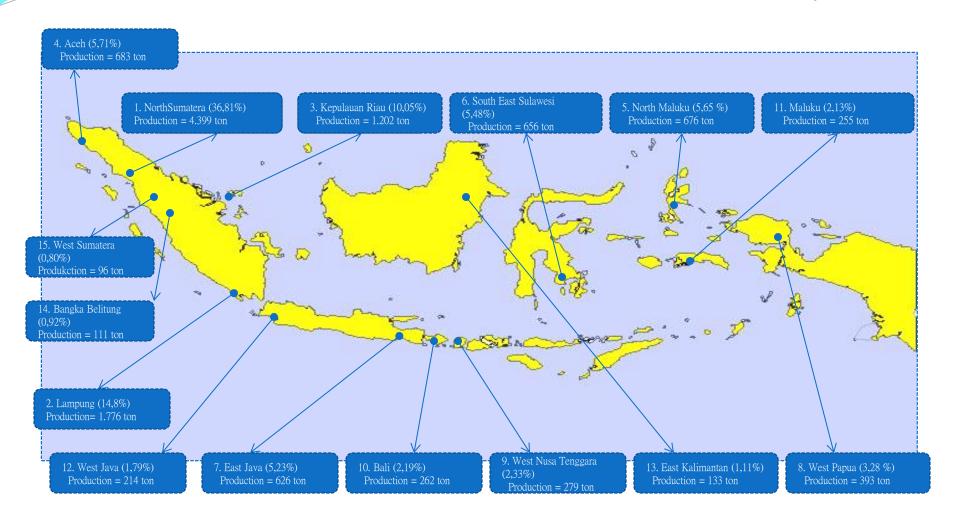
^{**)} Figure Target

INDONESIAN VANAME PRODUCTION CENTER, 2012



Source: Buku Statistik Perikanan Budidaya Indonesia, 2012

INDONESIAN GROUPER FISH PRODUCTION CENTER, 2012



Source: Buku Statistik Perikanan Budidaya Indonesia, 2012

KADIN-INDONESIA CONTRIBUTIONS:

- Kadin Indonesia through KADIN MARINE AFFAIR and FISHERIES SECTOR have collaborated with the Ministry Marine Affair and Fisheries Republic of Indonesia to increase sustainable aquaculture industry investment starting from local investors in shrimp and fish industries.
- Currently KADIN MARINE AFFAIR and FISHERIES SECTOR is inviting international investors to invest in aquaculture and processing industries of fish, shrimp and seaweed.
- Kadin will provide assistance in facilitating investors in obtaining permits, required area, human resources, local market, and partnership with Indonesian entrepreneurs.
- We expect the international investors would bring their advanced aquaculture technology and international market in addition to their investment funds.



KADIN KELAUTAN DAN PERIKANAN