KEMENTERIAN KELAUTAN DAN PERIKANAN

PROFIL PASAR
UDANG

SHRIMP MARKET PROFILE



2024





PROFIL PASAR UDANG
SHRIMP MARKET PROFILE 2024

Diterbitkan oleh
Published by

Direktorat Jenderal Penguatan Daya Saing Produk Kelautan dan Perikanan
Kementerian Kelautan dan Perikanan Republik Indonesia
Directorate General of Product Competitiveness
Ministry of Marine Affairs and Fisheries of the Republic of Indonesia



Kata Pengantar

Preface

Indonesia Emas 2045 merupakan visi strategis yang bertujuan untuk membawa bangsa Indonesia menjadi negara yang tangguh, mandiri dan inklusif tepat seratus tahun Indonesia Merdeka. Presiden dan Wakil Presiden terpilih menerjemahkan visi tersebut melalui misi pembangunan untuk periode 2025-2029, yang dikenal sebagai Asta Cita dengan tujuan "Bersama Indonesia Maju, Menuju Indonesia Emas 2045".

Hilirisasi kini menjadi komitmen nasional mendukung Asta Cita yang berfungsi sebagai instrumen penting untuk mempercepat pertumbuhan ekonomi. Sejalan dengan hal tersebut, Kementerian Kelautan dan Perikanan secara konsisten terus menerapkan prinsip-prinsip ekonomi biru dalam percepatan hilirisasi perikanan melalui program prioritas Penangkapan Ikan Terukur Berbasis Kuota dan Pembangunan Budi Daya Laut, Pesisir dan Darat yang Berkelanjutan.

Dalam rangka mendukung kebijakan ekonomi biru, Direktorat Jenderal Penguatan Daya Saing Produk Kelautan dan Perikanan terus berupaya memperluas akses pasar dan meningkatkan posisi produk perikanan Indonesia di pasar global salah satunya melalui penyusunan profil pasar ekspor komoditas prioritas udang. Profil pasar mencakup kondisi pasar global, termasuk permintaan, tren konsumsi, regulasi, dan preferensi konsumen yang disusun dalam bentuk *booklet* sebagai *insight* bagi pembaca.

Kami menyampaikan ucapan terima kasih kepada semua pihak atas dukungannya dalam penyusunan *booklet* ini.

Jakarta, Desember 2024

Direktur Jenderal Penguatan Daya Saing Produk Kelautan dan Perikanan

Indonesia Emas 2045 is a strategic vision aimed at transforming Indonesia into a resilient, independent, and inclusive nation by the centennial of its independence. The elected President and Vice President are bringing this vision to life through their development mission for 2025-2029, known as *Asta Cita*, with the goal of "Moving Forward Together Towards Golden Indonesia 2045".

The concept of down-streaming has now become a national commitment, supporting *Asta Cita* as a key instrument to accelerate economic growth. In line with this, the Ministry of Marine Affairs and Fisheries has consistently applied blue economy principles to expedite the down-streaming of the fisheries sector through priority programs, such as Quota-based Measured Fishing and the Development of Sustainable Marine, Coastal, and Inland Aquaculture.

In support of the blue economy policy, the Directorate General of Product Competitiveness continues to expand market access and improve the positioning of Indonesian fishery products in the global market. One of the efforts is through the development of export market profiles for priority commodity of shrimp. These market profiles include global market conditions, such as demand, consumption trends, regulations, and consumer preferences, all presented in this booklet to provide valuable insights for the readers.

We would like to express our gratitude to everyone for their support in the creation of this booklet.

Jakarta, December 2024

Director General of Product Competitiveness

Daftar Isi
Table of Contents

Kata Pengantar / *Preface* iii

1 Mengenal Udang / *Introduction to Shrimp* 1

2 Produksi Udang / *Shrimp Production* 4
- 2.1 Produsen Global / *Global Producers* 5
- 2.2 Bagaimana Produksi di Indonesia / *Shrimp Production in Indonesia* 10
- 2.3 Jenis Udang Unggulan Indonesia / *Indonesia Top Shrimps* 12
- 2.4 Bentuk Produk Udang / *Shrimps Products* 13

3 Pasar Global Udang / *Shrimp Global Market* 14
- 3.1 Permintaan Global / *Global Demand* 15
- 3.2 Importir Udang Dunia / *Global Shrimp Importers* 16
- 3.3 Eksportir Udang Dunia / *Global Shrimp Exporters* 17
- 3.4 Capaian Ekspor Indonesia / *Indonesia Export Performance* 18
- 3.5 Daya Saing Udang Indonesia / *Indonesia's Shrimp Competitiveness* 20

4 Eksportir Udang Indonesia / *Indonesia Shrimp Exporters* 26

5 Tentang Ditjen PDSPKP / *About Directorate General of Product Competitiveness* 28



1. Mengenal Udang

Introduction to Shrimp



Iklim tropis Indonesia memungkinkan produksi udang sepanjang tahun dengan kualitas unggul, cita rasa lezat, dan kandungan gizi yang tinggi. Udang, yang tergolong dalam subfilum *Crustacea*, merupakan salah satu jenis seafood paling populer di dunia. *Crustacea* ini memiliki kemampuan beradaptasi yang baik sehingga dapat hidup di berbagai jenis perairan, termasuk air tawar, laut, dan payau.

Indonesia dikenal sebagai salah satu produsen udang terbesar di dunia dengan beragam jenis udang seperti udang windu (*Penaeus monodon*), udang vaname (*Litopenaeus vannamei*), udang putih (*Penaeus merguiensis*), udang dogol (*Metapenaeus monoceros*), udang galah (*Macrobranchium rosenbergii*), serta jenis lainnya.

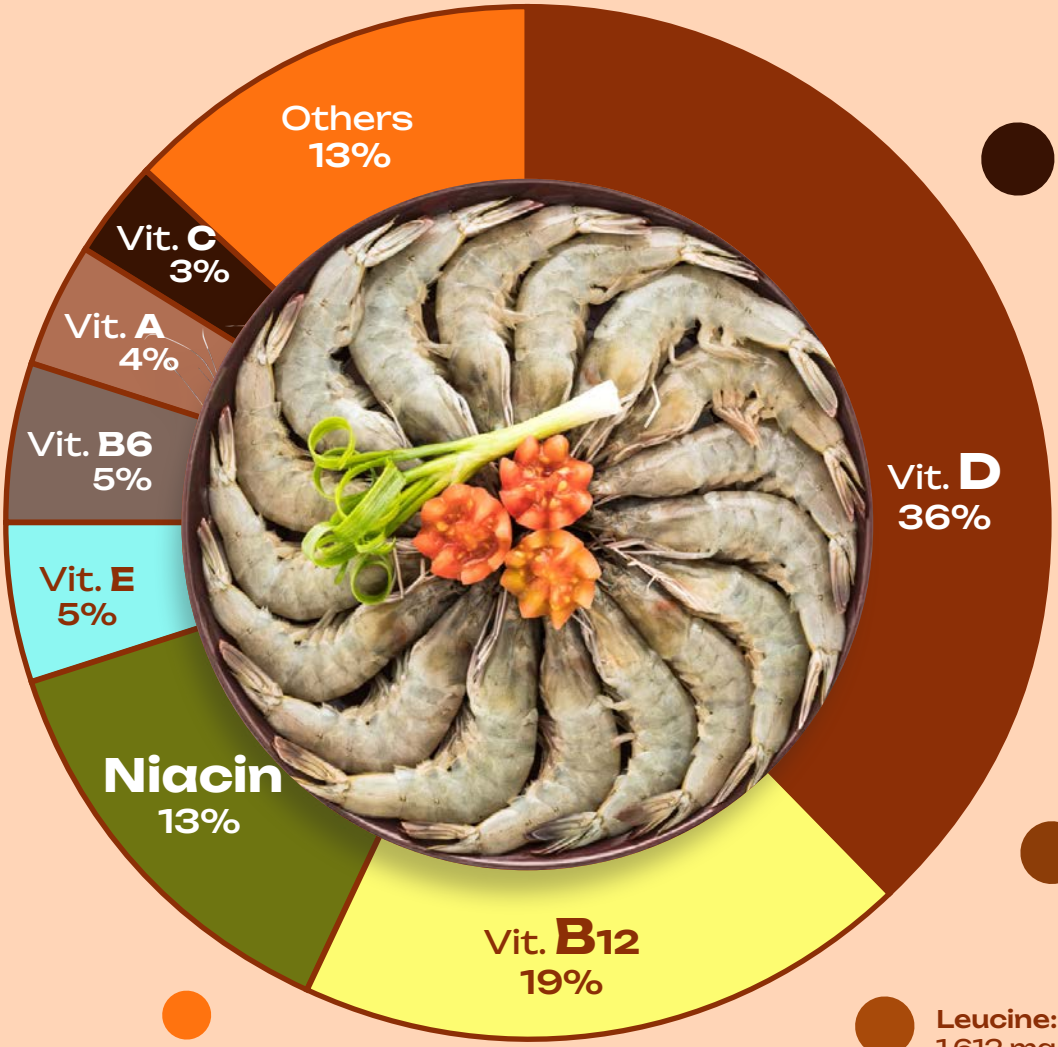
Udang adalah sumber protein berkualitas tinggi yang kaya akan asam amino esensial dan sekitar 85-95 persen proteinnya mudah diserap oleh tubuh. Dalam 100 gram udang mentah, terkandung sekitar 20,3 gram protein atau setara dengan 41 persen dari kebutuhan protein harian. Selain itu, kandungan berbagai vitamin pada udang menjadikannya pilihan makanan yang sangat baik untuk dikonsumsi.

Indonesia's tropical climate allows local shrimp to thrive, offering top-notch quality year-round, with a delicious taste and rich nutritional value. Shrimp, which belongs to the subphylum *Crustacea*, is one of the most popular types of seafood worldwide. These *crustaceans* can thrive in various types of waters, including freshwater, seawater, and brackish environments.

Indonesia is home to a wide variety of shrimp species, such as black tiger shrimp (*Penaeus monodon*), whiteleg shrimp (*Litopenaeus vannamei*), white shrimp (*Penaeus merguiensis*), Indian white shrimp (*Metapenaeus monoceros*), giant river prawn (*Macrobrachium rosenbergii*), and many others.

Shrimp is a high-quality source of protein, packed with essential amino acids, and about 85-95 percent of its protein is easily digestible by the body. In 100 grams of raw shrimp, there are approximately 20.3 grams of protein, which accounts for about 41 percent of recommended daily protein intake. The variety of vitamins found in shrimp also makes it an excellent choice for a nutritious diet.

Shrimp: Highest Vitamin Content and Amino Acid Profile (per 100 g) based on the daily value percentages[1]



- **Glutamic acid:** 3,465 mg
- **Aspartic acid:** 2,100 mg
- **Arginine:** 1,775 mg
- **Lysine:** 1,768 mg
- **Leucine:** 1,612 mg
- **Glycine:** 1,225 mg
- **Isoleucine:** 985 mg
- **Valine:** 956 mg



[1] Kesehatan Pedia. 2015. Kandungan Gizi Udang dan Manfaatnya untuk Kesehatan. Accessed on 24 October 2024



2. Produksi Udang

Shrimp Production

Indonesia menempati peringkat ke-4 sebagai produsen udang terbesar di dunia pada tahun 2022[2]

Indonesia was the world's fourth-largest shrimp producer in 2022[2]

2.1 Produsen Global
2.1 Global Producers

Produksi udang dunia tahun 2022 mencapai 11,82 juta ton atau mengalami peningkatan sebesar 4,8 persen dibandingkan tahun sebelumnya. Dari jumlah tersebut, produksi udang budi daya sebesar 8,53 juta ton atau meningkat 6,7 persen dari 7,99 juta ton pada tahun sebelumnya. Jenis udang budi daya yang paling dominan adalah udang vaname dengan kontribusi 80 persen dari total produksi udang budi daya, dan diikuti oleh udang windu yang menyumbang 11,1 persen.

Tiongkok menjadi produsen utama udang vaname dunia di tahun 2022 dengan capaian sebesar 2,10 juta ton atau meningkat 6,1 persen dibanding tahun sebelumnya. Posisi kedua diduduki oleh Ekuador, dan berturut-turut diikuti oleh India, Vietnam, Indonesia, Thailand, Meksiko, Brasil dan Arab Saudi.

Produksi udang windu didominasi oleh negara-negara di Asia, dengan Vietnam sebagai produsen utama yang menghasilkan 270 ribu ton atau 35,4 persen dari total produksi udang windu global. Posisi berikutnya ditempati oleh Indonesia (16,6 persen), Tiongkok (15,0 persen), Bangladesh (9,2 persen), India (7,8 persen), dan Myanmar (5,7 persen).

Industri akuakultur udang global diperkirakan akan mengalami stagnasi pada tahun 2025. Menurut Global Seafood Alliance, pertumbuhan di Ekuador melambat dari 14 persen selama 8 tahun terakhir menjadi sekitar 3 persen, India diprediksi akan tumbuh moderat sekitar 2 persen, Vietnam mengalami kenaikan sebesar 4 persen, sementara Indonesia diperkirakan akan tetap stagnan.[3]

The global shrimp production in 2022 reached a total of 11.82 million tonnes, marking a 4.8 percent increase compared to the previous year. From that total, shrimp aquaculture production reached 8.53 million tonnes, marking a 6.7 percent increase from the previous year, which was 7.99 million tonnes. The most widely farmed shrimp species is vannamei, accounting for 80 percent of global aquaculture production, followed by black tiger shrimp, contributing 11.1 percent.

China became the world's leading producer of vannamei shrimp, with a total volume of 2.10 million tonnes in 2022, marking a 6.1 percent increase compared to 2021. Ecuador holds the second position, followed by India, Vietnam, Indonesia, Thailand, Mexico, Brazil, and Saudi Arabia.

The majority of black tiger shrimp is produced by countries in Asia, with Vietnam leading the way, producing 270 thousand tonnes, which accounts for 35.4 percent of the global production. Following Vietnam are Indonesia (16.6 percent), China (15.0 percent), Bangladesh (9.2 percent), India (7.8 percent), and Myanmar (5.7 percent).

The global shrimp aquaculture industry is expected to remain relatively stagnant by 2025. According to the Global Seafood Alliance, Ecuador's growth has slowed from 14 percent over the past 8 years to around 3 percent, while India is predicted to see moderate growth of about 2 percent. Vietnam is expected to experience a 4 percent increase, and Indonesia is likely to remain stagnant.[3]

[2] FAO. 2024. Fishery and Aquaculture Statistics. Global production by production source 1950-2022 (FishStatJ). Rome. downloaded at 29 March 2024

[3] Seafoodsource. 2024. "Global shrimp production could plateau in 2025". Accessed on 24 October 2024.

Produksi udang di dunia (2022)[4]

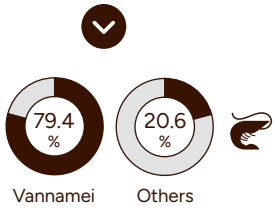
Global shrimp production (2022)[4]



7. Mexico

0.25 million tonnes
Total Production

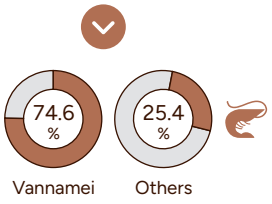
2.1%
World production



10. Brazil

0.15 million tonnes
Total Production

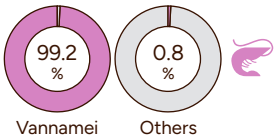
1.3%
World production



5. Ecuador

1.12 million tonnes
Total Production

9.5%
World production



8. Argentina

0.21 million tonnes
Total Production

1.8%
World production

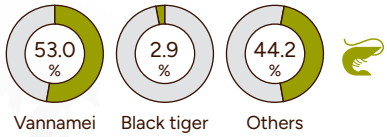


[4] FAO. 2024. Fishery and Aquaculture Statistics. Global production by production source 1950-2022 (FishStatJ). Rome. downloaded at 29 March 2024

1. China

3.96 million tonnes
Total Production

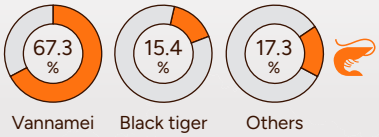
33.5%
World Production



2. India

1.45 million tonnes
Total Production

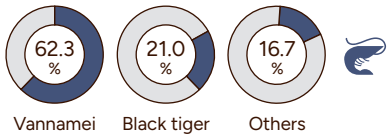
12.2%
World Production

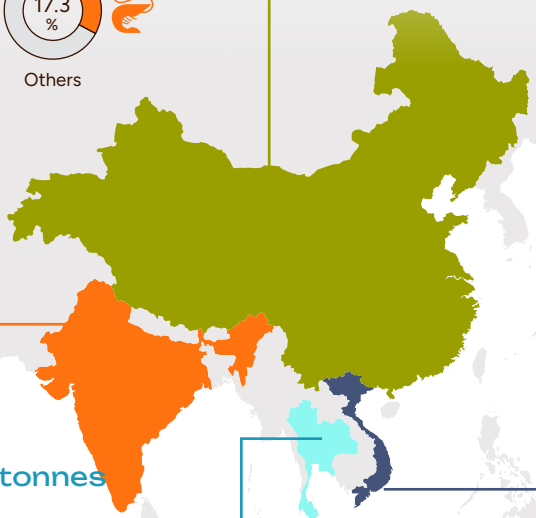


3. Vietnam

1.29 million tonnes
Total Production

10.9%
World Production

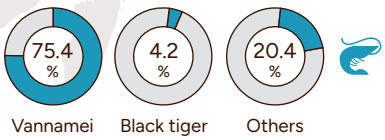




6. Thailand

0.49 million tonnes
Total Production

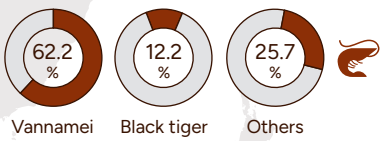
4.1%
World Production



4. Indonesia

1.15 million tonnes
Total Production

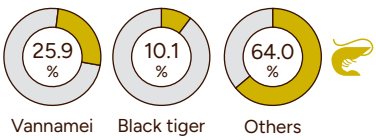
9.8%
World Production



9. Malaysia

0.15 million tonnes
Total Production

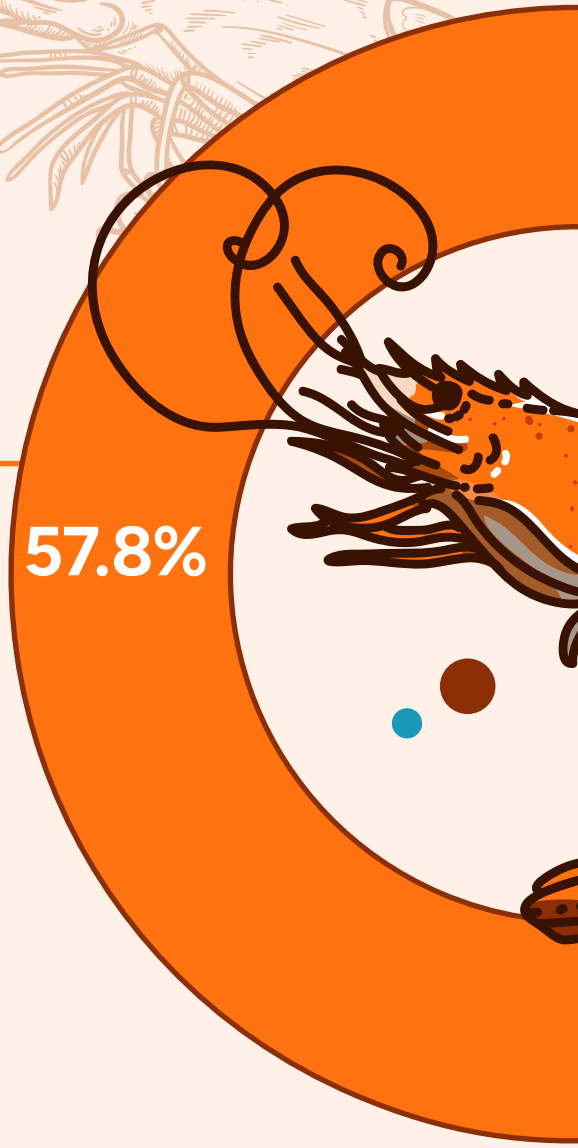
1.3%
World Production



Total Production:
11.82 million tonnes

Produksi udang di dunia berdasarkan jenis tahun 2022[5]

World shrimp production based on species in 2022[5]

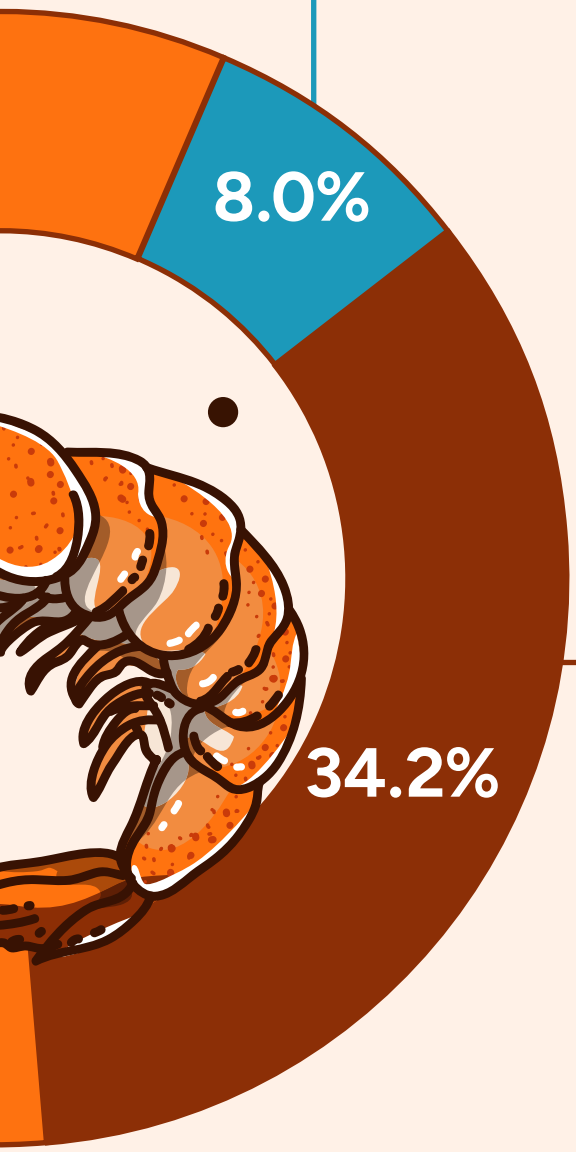


Vannamei

6.83 million tonnes

China	30.7%	2.10 million tonnes
Ecuador	16.3%	1.11 million tonnes
India	14.3%	0.97 million tonnes
Vietnam	11.7%	0.80 million tonnes
Indonesia	10.5%	0.72 million tonnes
Others	16.5%	1.13 million tonnes

[5] FAO. 2024. Fishery and Aquaculture Statistics. Global production by production source 1950-2022 (FishStatJ). Rome. downloaded at 29 March 2024.



Black tiger

0.94 million tonnes

Viet Nam	28.6%	0.27 million tonnes
India	23.6%	0.22 million tonnes
Indonesia	14.9%	0.14 million tonnes
China	12.1%	0.11 million tonnes
Bangladesh	7.5%	0.07 million tonnes
Others	13.3%	0.01 million tonnes

Others

4.04 million tonnes

China	43.3%	1.75 million tonnes
Indonesia	7.3%	0.30 million tonnes
India	6.2%	0.25 million tonnes
Vietnam	5.3%	0.22 million tonnes
Argentina	5.2%	0.21 million tonnes
Others	32.7%	1.32 million tonnes

2.2 Bagaimana produksi di Indonesia?

2.2 Shrimp Production in Indonesia

Total produksi udang Indonesia tahun 2023 mencapai 1,23 juta ton dengan nilai Rp 77,52 triliun. Berdasarkan komposisi jenis usahanya, sekitar 76,7 persen berasal dari budi daya dan 23,3 persen berasal dari hasil tangkapan.

In 2023, Indonesia's total shrimp production reached 1.23 million tonnes, with a value of IDR 77.52 trillion. Of this, 76.7 percent came from aquaculture, while 23.3 percent was from wild-caught production.



Capaian produksi udang budi daya di Indonesia tahun 2023 (dalam ton)[6]

Shrimp production in Indonesia for 2023 (in tonnes)[6]



Shrimp Aquaculture Production in 2023

Volume:
942 thousand tonnes

Value:
IDR 62.70 trillion

[6] One Data MMAF. 2024. Aquaculture Production Based on Provinces. Jakarta.

2.3 Jenis Udang Unggulan Indonesia

2.3 Indonesian Top Shrimps

1

Udang Vaname
(Litopenaeus vannamei)
Vannamei Shrimp
(Litopenaeus vannamei)



Udang vaname atau dikenal juga dengan *white leg shrimp* pertama kali diperkenalkan di Indonesia pada tahun 2001 yang kemudian produksinya terus berkembang. Produksi udang vaname saat ini telah mencapai lebih dari 62,2 persen dari total produksi udang Indonesia.

Vannamei shrimp, also known as white leg shrimp, was first introduced to Indonesia in 2001. Since then, its production has grown rapidly, currently accounting for over 62.2 percent of Indonesia's total shrimp production.

2

Udang Windu
(Penaeus monodon)
Black Tiger Shrimp
(Penaeus monodon)



Indonesia merupakan produsen terbesar kedua udang windu di dunia. Udang jenis ini banyak dibudidayakan, mulai dari cara tradisional hingga pengembangan budi daya organik, yang terpusat di wilayah Kalimantan Timur, Pulau Jawa, dan Pulau Sumatera.

Indonesia is the world's second-largest producer of black tiger shrimp. This type of shrimp is widely farmed, from traditional methods to the development of organic farming techniques, particularly in East Kalimantan, Java island, and Sumatra island.

3

Udang Tangkapan
Sea-Caught Shrimp



Udang tangkapan di Indonesia terdiri dari tiga varietas utama, yaitu *Penaeus spp, Metapenaeus spp,* dan *Parapenaeopsis spp.* Udang jenis ini banyak ditemukan di Selat Malaka, Selat Bangka, Selat Karimata, Laut Jawa, Selat Makassar, dan Laut Arafura.[7]

In Indonesia, sea-caught shrimp consist of three major varieties: *Penaeus spp, Metapenaeus spp,* and *Parapenaeopsis spp.* These shrimp are commonly found in the Malacca Strait, Bangka Strait, Karimata Strait, Java Sea, Makassar Strait, and Arafura Sea.[7]

[7] Sumber: https://indonesiashrimp.com/

2.4 Bentuk Produk Udang

2.4 Shrimps Products



Udang Mentah
Raw

Produk udang mentah berupa udang segar yang dapat digunakan sebagai bahan baku makanan.

Raw shrimp refers to fresh shrimp that can be used as raw material for food production.



Udang Kupas
Peeled

Udang kupas adalah produk udang yang dikemas dalam bentuk sudah terkupas.

Peeled shrimp refers to shrimp that has been peeled and then packaged.



Udang Matang
Cooked

Udang matang adalah produk udang yang telah melalui proses pemasakan.

Cooked shrimp refers to shrimp that has undergone a cooking process.



Udang Olahan
Value Added

Udang olahan adalah udang yang telah diolah menjadi bentuk lain seperti udang tepung (*breaded*).

Value-added shrimp refers to shrimp that has been processed into another form, such as breaded shrimp.



3. Pasar Global Udang

Shrimp Global Market

Ukuran pasar udang dunia tahun 2023 sebesar USD 72,16 Miliar dan diperkirakan akan tumbuh (CAGR) 5,5 persen per tahun selama periode 2024-2031 menjadi USD 110,75 Miliar.[8]

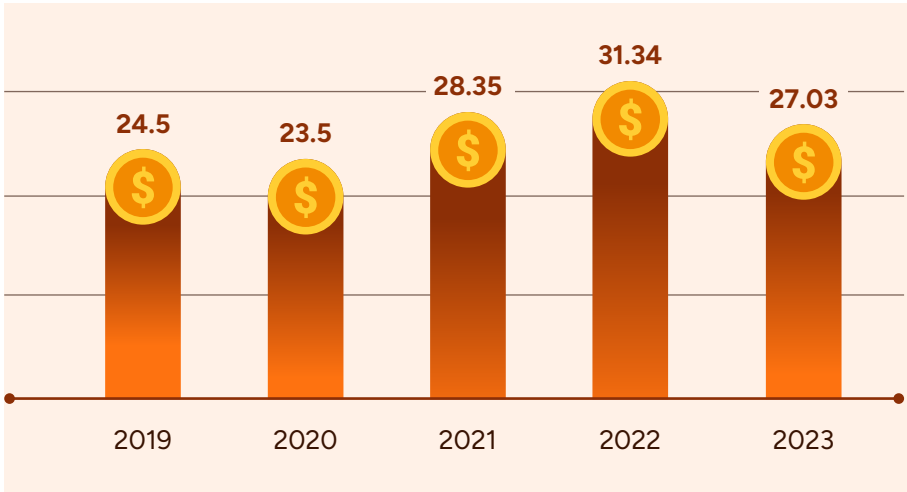
The global shrimp market size was valued at USD 72.16 billion in 2023 and is expected to grow at a compound annual growth rate (CAGR) of 5.5 percent from 2024 to 2031, reaching an estimated USD 110.75 billion.[8]

3.1 Permintaan Global

3.1 Global Demand

Impor udang global menunjukkan tren positif selama periode 2019-2023 dengan rata-rata pertumbuhan 3,3 persen per tahun. Pada tahun 2023, permintaan udang dunia mencapai 3,79 juta ton dengan nilai USD 27,03 miliar atau mengalami penurunan sebesar 0,3 persen dalam volume dan 13,7 persen dalam nilai dibandingkan tahun sebelumnya. Penurunan nilai impor yang signifikan ini dipengaruhi oleh kelebihan suplai dan keraguan konsumen untuk membeli udang akibat krisis energi yang dipicu oleh perang. Kondisi tersebut berdampak pada stok udang yang berlebih dan penurunan harga udang hingga 40 persen.[9]

The global shrimp import has shown a positive trend from 2019 to 2023, with an average growth rate of 3.3 percent annually. In 2023, the global demand for shrimp reached 3.79 million tonnes, valued at USD 27.03 billion. This represented a slight decrease of 0.3 percent in volume and a more significant decline of 13.7 percent in value compared to the previous year. The notable drop in import value can be attributed to factors such as oversupply and consumer hesitancy in purchasing shrimp due to the energy crisis caused by ongoing conflicts. As a result, there has been an excess of shrimp stocks, leading to a price reduction of up to 40 percent.[9]



Grafik 1.
Impor udang dunia periode tahun 2019 - 2023 (dalam USD miliar)

Chart 1.
Global shrimp import in 2019 - 2023 (USD billion)

[8] TechNavio. 2023. Shrimp Market by Product, Distribution Channel, and Geography - Forecast and Analysis 2023-2027. Canada

[9] Loock, Bert Van. 2024. INTERVIEW: Global shrimp market faces significant shift in H1 amid oversupply, declining prices: Aquamarine MD. Retrieved 3 December 2024 from S&P Global Commodity Insights.

3.2 Importir Udang Dunia

3.2 Global Shrimp Importers

Nilai impor udang tahun 2023 di beberapa negara importir utama dunia mengalami penurunan dibandingkan dengan tahun 2022. Nilai impor udang Amerika Serikat pun mengalami penurunan sebesar 20,5 persen dibanding tahun sebelumnya dengan total nilai mencapai USD 6,67 miliar. Meski demikian, Negeri Paman Sam ini tetap menjadi pengimpor terbesar udang dunia dengan kontribusi sebesar 24,7 persen dari total impor udang global.

In 2023, the shrimp import value for some of the world's major importers showed a decline compared to 2022. The United States remains the largest importer of shrimp globally, with a total import value reaching USD 6.67 billion in 2023. Despite a 20.5 percent drop compared to the previous year, imports from the U.S. still dominate, accounting for 24.7 percent of global shrimp imports.

> **Tingginya inflasi tahun 2023 dan perlambatan ekonomi mempengaruhi penurunan impor udang Amerika Serikat.[10]**
>
> The high inflation of 2023 and the economic slowdown have impacted the decline in shrimp imports to the U.S.[10]

Country	Value (USD billion)	Share (%)	Trend (YoY, %)	Share IDN (%)
United States	6.67	24.7	-20.5	18.2
European Union	6.36	23.5	-10.5	0.9
China	6.02	22.3	-4.3	1.6
Japan	1.94	7.2	-19.0	16.4
ASEAN	0.92	3.4	-15.4	5.7

Tabel 1.
Importir utama udang dunia tahun 2023[11]

Table 1.
Top shrimp importers in 2023[11]

Di periode Januari-September 2024, impor udang Amerika Serikat mencapai 549,67 ribu ton dengan nilai USD 4,29 Miliar. Jumlah ini mengalami penurunan volume sebesar 4,5 persen dan penurunan nilai sebesar 9,6 persen dibandingkan tahun sebelumnya. Penurunan impor udang ini berkorelasi dengan penurunan pasokan udang dari negara-negara pemasok utama seperti India, Ekuador dan Indonesia.[12]

From January to September 2024, shrimp imports from the United States totaled 549.67 thousand tonnes, valued at USD 4.29 billion. This represents a 4.5 percent decline in volume and a 9.6 percent drop in value compared to the previous year (y-o-y). The decrease in shrimp imports is closely tied to a reduction in supply from key exporting countries like India, Ecuador, and Indonesia.[12]

[10] FAO. 2024. "US Shrimp Imports Declined in 2023". Accessed in 2024.

[11] ITC Trademap. Accessed on 18 October 2024. Author analysis.

[12] Undercurrent News. 2024. "US wholesale: Shrimp sellers bullish as India, Indonesia, Vietnam drive small September import gain". Accessed on 7 November 2024.

3.3 Eksportir Udang Dunia

3.3 Global Shrimp Exporters

Indonesia menempati urutan kelima sebagai eksportir utama udang dunia tahun 2023 dan Ekuador menjadi pesaing utama ekspor udang Indonesia.

Ecuador has emerged as a key competitor to Indonesia in the global shrimp export market. In 2023, Indonesia ranked 5th among the world's largest shrimp exporters.

Sebagian besar eksportir utama udang dunia mengalami penurunan ekspor pada tahun 2023, kecuali Tiongkok. Bahkan Ekuador yang menguasai 25,5 persen dari total ekspor udang dunia pun mengalami penurunan sebesar 10,3 persen. Berdasarkan data Ecuador's National Chamber of Aquaculture (CNA), pada periode Januari-Agustus 2024 ekspor udang Ekuador mencapai 847,95 ribu ton dengan nilai USD 4,0 miliar atau mengalami kenaikan 2 persen dalam volume namun mengalami penurunan 6 persen dalam nilai dibandingkan periode yang sama tahun sebelumnya.[13]

Almost all major shrimp exporters around the world experienced a decline in exports in 2023, with the exception of China. Ecuador, which accounts for 25.5 percent of global shrimp exports, also saw a 10.3 percent drop in its export value. According to Ecuador's National Chamber of Aquaculture (CNA), from January to August 2024, Ecuador's shrimp exports reached 847.95 thousand tonnes, valued at USD 4.0 billion. This marks a 2 percent increase in volume, but a 6 percent decrease in value compared to the same period last year (YoY).[13]

Country	Value (USD billion)	Share (%)	Trend (YoY, %)
Ecuador	7.25	25.5	-10.3
India	4.91	17.3	-11.3
Vietnam	2.92	10.3	-27.2
China	1.94	6.8	1.9
Indonesia	1.73	6.1	-19.8

Tabel 2.
Eksportir utama udang dunia tahun 2023[14]

Table 2.
Top shrimp exporters in 2023[14]

[13] Undercurrent News. 2024. "Trade insights: Ecuador's shrimp exports bounce back in August". Accessed on 3 October 2024.

[14] ITC Trademap. Accessed on 18 October 2024. Author analysis.

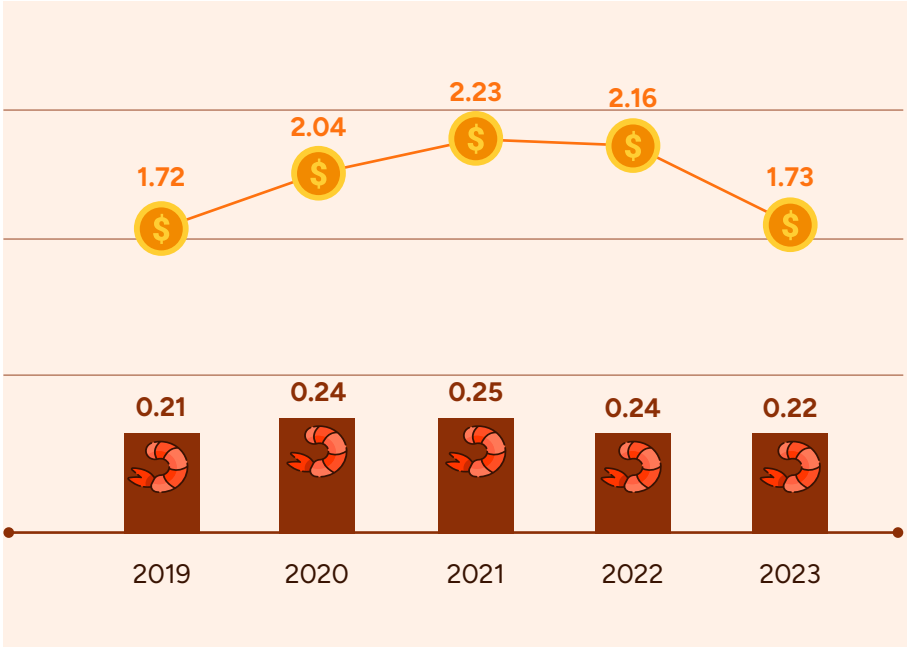
3.4 Capaian Ekspor Indonesia

3.4 Indonesia Export Performance

> **Udang menjadi komoditas utama ekspor perikanan Indonesia dengan kontribusi sebesar 30,7 persen.**
>
> The shrimp commodity is the largest contributor to Indonesia's fishery exports, accounting for 30.7 percent of the total.

Selama periode 2019-2023, nilai ekspor udang Indonesia menunjukkan tren positif dengan rata-rata pertumbuhan sebesar 1,2 persen per tahun. Ekspor udang Indonesia ke pasar global didominasi dalam bentuk udang beku (64,5 persen) dan udang matang beku (24,5 persen).

The export value of Indonesian shrimp has shown a positive trend from 2019 to 2023, with an average annual growth rate of 1.2 percent. Indonesian shrimp exports are largely dominated by frozen raw shrimp (64.5 percent) and frozen cooked shrimp (24.5 percent).



Grafik 2.
Ekspor udang Indonesia 2019-2023 (dalam USD miliar)[15]

Chart 2.
Indonesia shrimp export in 2019-2023 (USD billion)[15]

: Value (USD billion)

: Volume (million tonnes)

[15] Indonesian Statistics. 2024. Author Analysis.



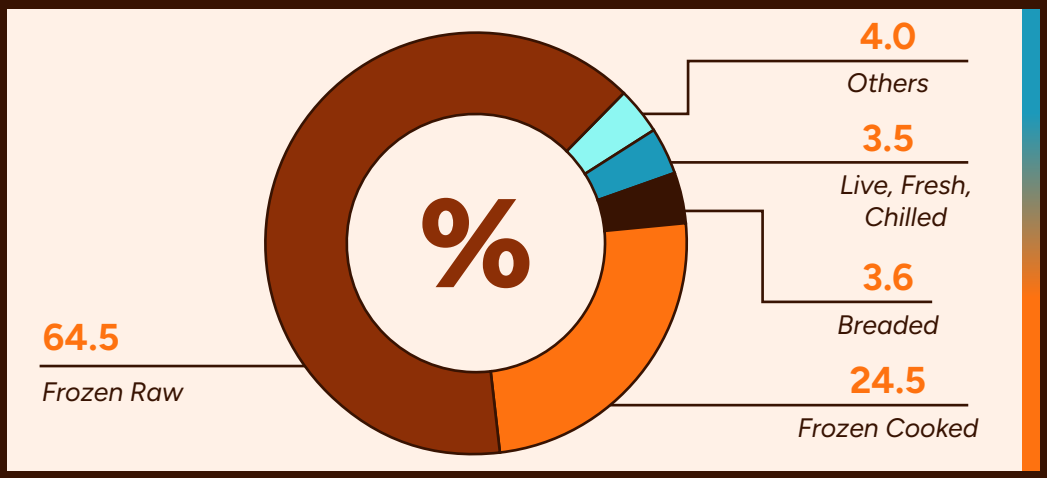
Amerika Serikat masih menjadi negara utama tujuan ekspor udang Indonesia dengan nilai ekspor tahun 2023 sebesar USD 1,11 miliar atau menyumbang 64,3 persen dari total ekspor udang Indonesia.

As of 2023, the United States remains the top destination for Indonesia's shrimp exports. The market value reached USD 1.11 billion, accounting for 64.3 percent of the country's total shrimp export.

Country	Value (USD billion)	Share (%)	Trend (YoY, %)	Volume (thousand tonnes)
United States	1.11	64.3	-21.9	141.54
Japan	0.31	17.6	-21.6	32.67
China	0.11	6.2	-7.4	16.37
ASEAN	0.05	3.0	26.4	13.36
European Union	0.04	2.5	-24.0	5.38

Tabel 3.
Pasar utama ekspor udang Indonesia tahun 2023[16]

Table 3.
The main export markets for Indonesia's shrimp in 2023[16]



Grafik 3.
Ekspor udang Indonesia berdasarkan bentuk produk 2023

Chart 3.
Indonesia's shrimp exports based on type of product in 2023

[16] Indonesian Statistics. 2024. Author Analysis

3.5 Daya Saing Udang Indonesia

3.5 Indonesia's Shrimp Competitiveness

Amerika Serikat

Indonesia menempati posisi kedua sebagai pemasok udang matang beku Amerika Serikat dengan pangsa 25,3 persen dan menjadi pemasok utama udang *breaded* dengan pangsa 32,0 persen. Tren pangsa pasar produk udang Indonesia terus meningkat selama periode 2019-2023, dan didukung oleh harga udang *breaded* Indonesia yang paling kompetitif dibandingkan negara pesaing.

United States

Indonesia is the second-largest supplier of frozen cooked shrimp, holding a 25.3 percent share, and the leading supplier of breaded shrimp with a 32.0 percent market share. Over the period from 2019 to 2023, the market share of Indonesia's shrimp products have shown a steady increase. Moreover, Indonesia's breaded shrimp prices remain the most competitive compared to its competitor countries.

Berdasarkan hasil analisa X-Model[17] , Amerika Serikat merupakan pasar potensial bagi produk udang matang beku dan udang *breaded* asal Indonesia.

Based on X-Model analysis[17], The United States is a promising market for frozen cooked shrimp and breaded shrimp from Indonesia.

Tabel 4. Analisis daya saing x-model udang Indonesia dan negara pesaing di Amerika Serikat
Table 4. X-model analysis of Indonesian shrimp and its competitors in the United States of America

Product	Country	Comparative: RCA	Competitive: EPD	X- Model
Frozen Cooked Shrimp (1605211030)	India	3.18	Falling Star	Potential Market
	Indonesia	**3.00**	**Falling Star**	**Potential Market**
	Vietnam	4.11	Rising Star	Optimistic Market
	Thailand	2.29	Retreat	Less Potential
	Ekuador	0.29	Rising Star	Potential Market
Breaded (1605211020)	**Indonesia**	**3.14**	**Falling Star**	**Potential Market**
	Thailand	5.62	Falling Star	Potential Market
	Vietnam	3.79	Rising Star	Optimistic Market
	Ekuador	1.41	Rising Star	Optimistic Market
	Tiongkok	1.64	Retreat	Less Potential

[17] X-Model merupakan analisis daya saing ekspor yang mengkombinasikan antara hasil analisis daya saing komparatif *(Revealed Comparative Advantage/RCA)* dengan hasil analisis daya saing kompetitif *(Export Product Dynamics/EPD)* dengan maksud untuk melakukan klasterisasi potensi pengembangan pasar suatu produk di negara tertentu

Tiongkok

Meski pangsa pasar udang mentah beku Indonesia di Tiongkok masih tergolong kecil (1,6 persen), namun selama periode tahun 2019-2023 pangsa produk udang Indonesia mengalami peningkatan. Pesaing utama Indonesia untuk produk ini adalah Ekuador.

China

Although Indonesia's share of the frozen raw shrimp market in China remains small (1.6 percent), there has been a noticeable increase in product export share from 2019 to 2023. Ecuador remains Indonesia's main competitor in this market.

> **Pasar Tiongkok merupakan pasar potensial bagi udang mentah beku Indonesia.**
>
> China is a potential market for Indonesian frozen raw shrimp.

Tabel 5. Analisis daya saing x-model udang Indonesia dan negara pesaing di Tiongkok
Table 5. X-model analysis of Indonesian shrimp and its competitors in China

Product	Country	Comparative: RCA	Competitive: EPD	X- Model
Frozen Raw Shrimp	Ecuador	4.90	Rising Star	Optimistic Market
	India	2.88	Retreat	Less Potential
	Thailand	1.66	Retreat	Less Potential
	Argentina	2.76	Retreat	Less Potential
	Indonesia	**0.26**	**Rising Star**	**Potential Market**



Australia

Tahun 2023, Vietnam menguasai 71,2 persen pangsa pasar udang di Australia, dan diikuti oleh Thailand (16,7 persen). Sedangkan Indonesia berada pada posisi ke-9 dengan pangsa pasar 0,5 persen.

Australia

In 2023, Vietnam dominated 71.2 percent of the shrimp market share in Australia, followed by Thailand at 16.7 percent. Meanwhile, Indonesia ranked 9th, holding just 0.5 percent of the market share.

Australia merupakan pasar potensial bagi udang olahan Indonesia.



Australia presents a significant market opportunity for Indonesia's processed shrimp.

Meskipun pangsa pasar udang olahan Indonesia di Pasar Australia masih sangat kecil (0,5 persen) namun selama periode tahun 2019-2023 terjadi peningkatan pangsa produk Indonesia. Pesaing utama Indonesia untuk produk ini adalah Vietnam.

Although Indonesia's share of the processed shrimp market in Australia remains small (0.5 percent), there has been a noticeable increase in product export share from 2019 to 2023. Vietnam continues to be Indonesia's main competitor in this market.

Tabel 6. Analisis daya saing x-model udang Indonesia dan negara pesaing di Australia
Table 6. X-model analysis of Indonesian shrimp and its competitors in Australia

Product	Country	Comparative: RCA	Competitive: EPD	X- Model
Frozen Raw Shrimp	Vietnam	3.58	Rising Star	Optimistic Market
	Thailand	1.46	Retreat	Less Potential
	China	0.55	Retreat	Not Potential
	Malaysia	0.66	Retreat	Not Potential
	Indonesia	**0.29**	**Rising Star**	**Potential Market**

Jepang

Pada tahun 2023, Vietnam menguasai 25,3 persen pangsa pasar udang di Jepang, diikuti oleh Thailand (16,7 persen) dan Indonesia (16,5 persen).

Japan

In 2023, Vietnam captured 25.3 percent of the shrimp market share in Japan, followed by Thailand at 16.7 percent, and Indonesia at 16.5 percent.

> **Jepang merupakan pasar optimis bagi udang beku dan udang olahan Indonesia.**
> Japan remains a promising market for Indonesia's frozen raw and processed shrimp.



Selama periode tahun 2019-2023, pertumbuhan pangsa produk udang beku dan udang olahan Indonesia mengalami peningkatan dengan harga yang cukup kompetitif, terutama untuk produk udang olahan. India merupakan pesaing utama produk udang beku Indonesia, sementara Vietnam merupakan pesaing utama udang olahan Indonesia.

Between 2019 and 2023, Indonesia's market share for frozen raw and processed shrimp grew steadily, driven by competitive pricing, particularly for processed shrimp. Indonesia's main competitor in the frozen raw shrimp market is India, while Vietnam leads in the processed shrimp segment.

Tabel 7. Analisis daya saing x-model udang Indonesia dan negara pesaing di Jepang
Table 7. X-model analysis of Indonesian shrimp and its competitors in Japan

Product	Country	Comparative: RCA	Competitive: EPD	X- Model
Frozen Raw Shrimp	India	6.85	Rising Star	Optimistic Market
	Vietnam	2.95	Lost Opportunity	Potential Market
	Indonesia	**3.43**	**Rising Star**	**Optimistic Market**
	Argentina	7.30	Rising Star	Optimistic Market
	Thailand	0.95	Retreat	Less Potential
Value Added Shrimp	Thailand	6.25	Retreat	Less Potential
	Vietnam	5.22	Rising Star	Optimistic Market
	China	0.32	Retreat	Not Potential
	India	0.58	Rising Star	Potential Market
	Indonesia	**2.70**	**Rising Star**	**Optimistic Market**

Intervensi dan Rencana Jangka panjang

Strategies for Intervention and Long-Term Planning



7

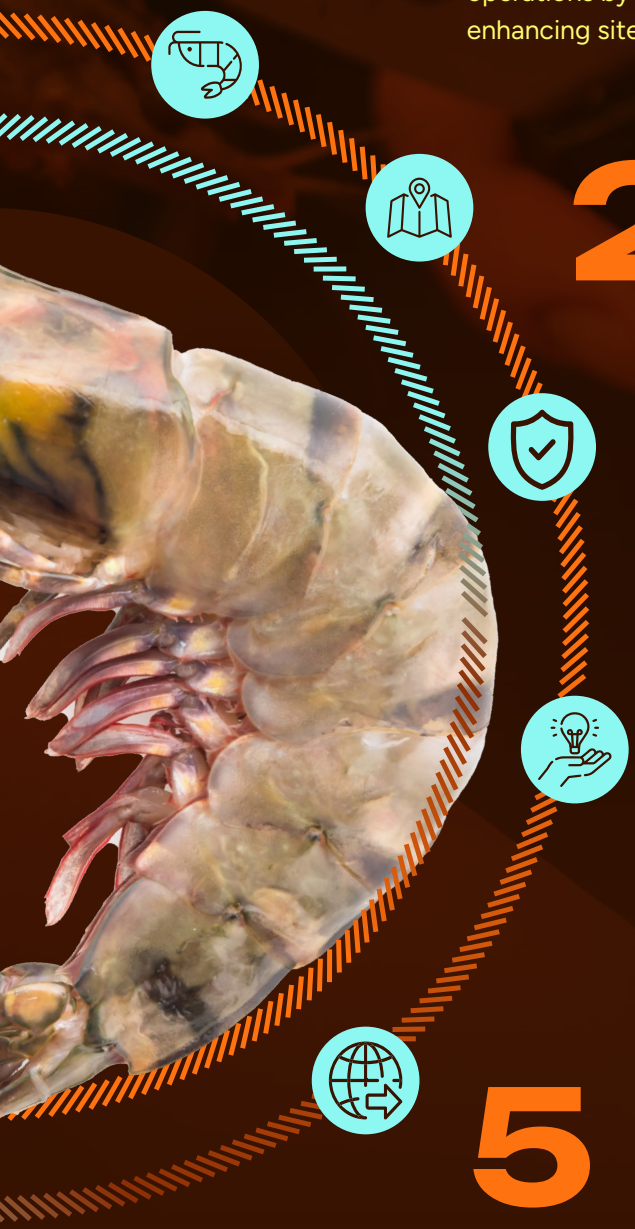
Mendorong adanya kolaborasi antara eksportir dan pembeli dalam mengembangkan produk bernilai tambah lainnya *(seasoned product)*.

Encouraging collaboration between exporters and buyers in developing specialty value-added products, such as seasoned shrimp.

6

Memperbesar pasar produk udang olahan di Tiongkok, Korea Selatan dan negara potensial lainnya melalui kegiatan pameran dan temu bisnis dengan trader yang menjual langsung ke supermarket dan restoran.

Expanding the market for processed shrimp product in China, South Korea, and other potential markets through exhibitions and business matchmaking, particularly targeting traders who supply directly to supermarkets and restaurants.



1

Revitalisasi tambak tradisional menjadi tambak berteknologi semi intensif melalui pengaturan padat tebar, peningkatan efisiensi pakan serta penataan kawasan dan IPAL.

Revitalizing traditional shrimp farms into semi-intensive, technology-driven operations by stocking density management, improving feed efficiency, and enhancing site management along with wastewater treatment systems.

2

Mendorong industri pengolahan terintegrasi dengan kawasan budi daya udang.

Promoting an integrated processing industry alongside shrimp farming areas.

3

Menjaga mutu dan keamanan produk yang menjadi persyaratan pasar tujuan ekspor.

Ensuring product quality and safety to meet the requirements of export destination markets.

4

Membuka akses pasar produk udang mentah ke Australia melalui kerja sama kesetaraan standar pengujian virus dan pengembangan teknologi budi daya dengan otoritas kompeten Australia.

Opening market access for raw shrimp products to Australia through mutual cooperation on virus testing standards and the development of farming technologies with Australia's relevant authorities.

5

Mempertahankan pasar udang beku dan meningkatkan ekspor produk udang *breaded* di pasar Amerika Serikat.

Maintaining the frozen shrimp market while boosting exports of breaded shrimp to the United States.



4. Eksportir Udang Indonesia

Indonesia Shrimp Exporters

1. **PT. Tri Mitra Makmur**
www.ebinoya.co.id
2. **PT. Suri Tani Pemuka**
www.japfacomfeed.co.id
3. **PT. Panca Mitra Multi Perdana**
www.pancamitra.com
4. **PT. Alter Trade Indonesia**
www.atina.co.id
5. **PT. Bahari Makmur Sejati**
www.bmsfood.com
6. **PT. Baramuda Bahari**
www.baramudabahari.com
7. **PT. Bumi Menara Internusa**
www.ptbmi.com
8. **PT. Central Proteinaprima Tbk.**
www.cpp.co.id
9. **PT. First Marine Seafood**
www.cpp.co.id
10. **PT. Indokom Samudera Persada**
www.indokomseafood.com
11. **PT. Istana Cipta Sembada**
www.ics-seafood.com
12. **PT. Kalimantan Fishery**
www.kalfish.com
13. **PT. Kelola Mina Laut**
www.kmlfood.com
14. **PT. Lestari Magris**
h_tjhia@lolamina.com
h_tjhia@yahoo.com
15. **PT. Lola Mina**
tjokro_fendry@lolamina.com
16. **PT. Madsumaya Indo Seafood**
www.monodonshrimp.com/
17. **PT. Mega Marine Pride**
www.megamarinepride.com
18. **PT. Mitra Kartika Sejati**
www.monodonshrimp.com
19. **PT. Multi Monodon Indonesia**
www.monodonshrimp.com
20. **PT. Sekar Bumi Tbk.**
www.sekarbumi.com
21. **PT. Sumber Pangan Nusantara**
www.ptspn.co.id
22. **PT. Surya Alam Tunggal**
www.pt-sat.com
23. **PT. Syam Surya Mandiri**
www.syamsurya.co.id
24. **PT. Wahyu Pradana Binamulia**
www.wahyupb.com
25. **PT. Winaros Kawula Bahari**
www.winaros.co.id
26. **PT. Wirontono Bahari**
www. wirontono.com
27. **PT. Jala Sembilan**
www.jalagroup.co.id
28. **PT. Seafood Sumatera Perkasa**
www.pt-sas.com
29. **PT. Central Pertiwi Bahari**
www.cpp.co.id
30. **CV. Kudatama Mas**
www.kudatamamas.co.id
31. **PT. Indo American Seafoods**
www.indoamericanseafoods.com
32. **PT. Cita Karya Agung**
www.variouseafood.com
33. **PT. Bahari Biru Nusantara**
www.baruna.net
34. **PT. Berjaya Usaha Sakti**
www.berjayausahasakti.com
35. **PT. Ayu Bumi Sejati**
www.ayubumisejati.co.id

Tentang Ditjen PDSPKP

About Directorate General of Product Competitiveness

Direktorat Jenderal Penguatan Daya Saing Produk Kelautan dan Perikanan (Ditjen PDSPKP) merupakan salah satu Direktorat Jenderal dibawah Kementerian Kelautan dan Perikanan (KKP) yang memiliki tugas pokok dan fungsi menyelenggarakan perumusan dan pelaksanaan kebijakan di bidang penguatan daya saing produk kelautan dan perikanan.

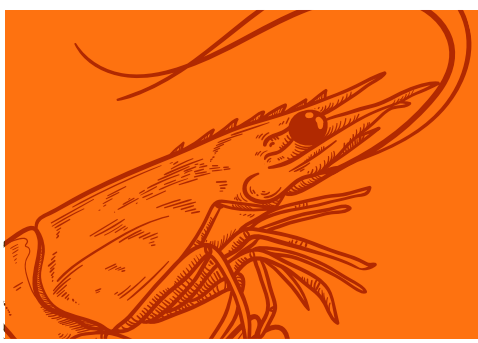
Ditjen PDSPKP mengupayakan peningkatan daya saing produk kelautan dan perikanan melalui kebijakan standardisasi, peningkatan nilai tambah, pengelolaan ketertelusuran produk kelautan dan perikanan, pengelolaan logistik ikan nasional, fasilitasi pemberdayaan usaha kelautan dan perikanan, serta pengolahan dan pemasaran hasil kelautan dan perikanan.

Dalam mendukung upaya penguatan daya saing produk kelautan dan perikanan, Ditjen PDSPKP berperan dalam memperkuat strategi pemasaran salah satunya melalui pemetaan dan analisis pasar global. Hal ini bertujuan untuk merespons dinamika permintaan, preferensi, dan tren konsumen di pasar global secara adaptif dan berbasis kebutuhan pasar, sehingga mampu menghadapi ketidakpastian dengan lebih progresif.

The Directorate General of Product Competitiveness (DGPC) is one of the Directorates under the Ministry of Marine Affairs and Fisheries (MMAF). Its main responsibility is to formulate and implement policies aimed at enhancing the competitiveness of marine and fisheries products.

DGPC strives to enhance the competitiveness of marine and fisheries products through policies on standardization, increasing added value, managing marine and fisheries product traceability, national fish logistics management, facilitating the empowerment of marine and fisheries businesses, as well as processing and marketing marine and fisheries products.

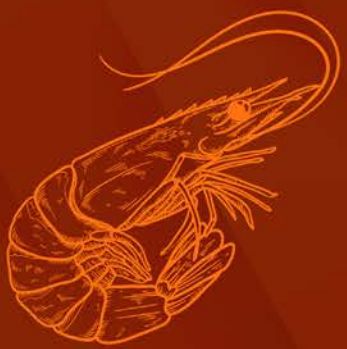
To support efforts in strengthening the competitiveness of marine and fisheries products, DGPC plays a key role in enhancing marketing strategies, one of which is through mapping and analyzing global markets. This initiative aims to respond adaptively to the dynamics of demand, consumer preferences, and consumer trends in the global market based on market needs, enabling progressive approach to facing uncertainties.



Ikuti Kami:
Follow Us:

@ditjenpdspkp
Ditjen PDSPKP
Ditjen_PDSPKP
ditjen_pdspkp

www.kkp.go.id/unit-kerja/djpdskp.html



PROFIL PASAR UDANG 2024

SHRIMP MARKET PROFILE 2024

Direktorat Jenderal Penguatan Daya Saing
Produk Kelautan dan Perikanan

Kementerian Kelautan dan Perikanan

Directorate General of Product Competitiveness
Ministry of Marine Affairs and Fisheries

Booklet ini tersedia daring
This booklet is available online

SCAN DI SINI
SCAN HERE

www.mi.kkp.go.id