



Ministry of Marine
Affairs and Fisheries
Republic of Indonesia

Indonesia's Blue Economy: Contributing to Sustainable Global Fisheries

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Vice Minister for Marine Affairs and Fisheries
Republic of Indonesia



Plenary Session: "Where Is the Fish?"
Global Fishery Forum 2026
St. Petersburg, 18 September 2026

EKONOMI BIRU UNTUK
INDONESIA EMAS

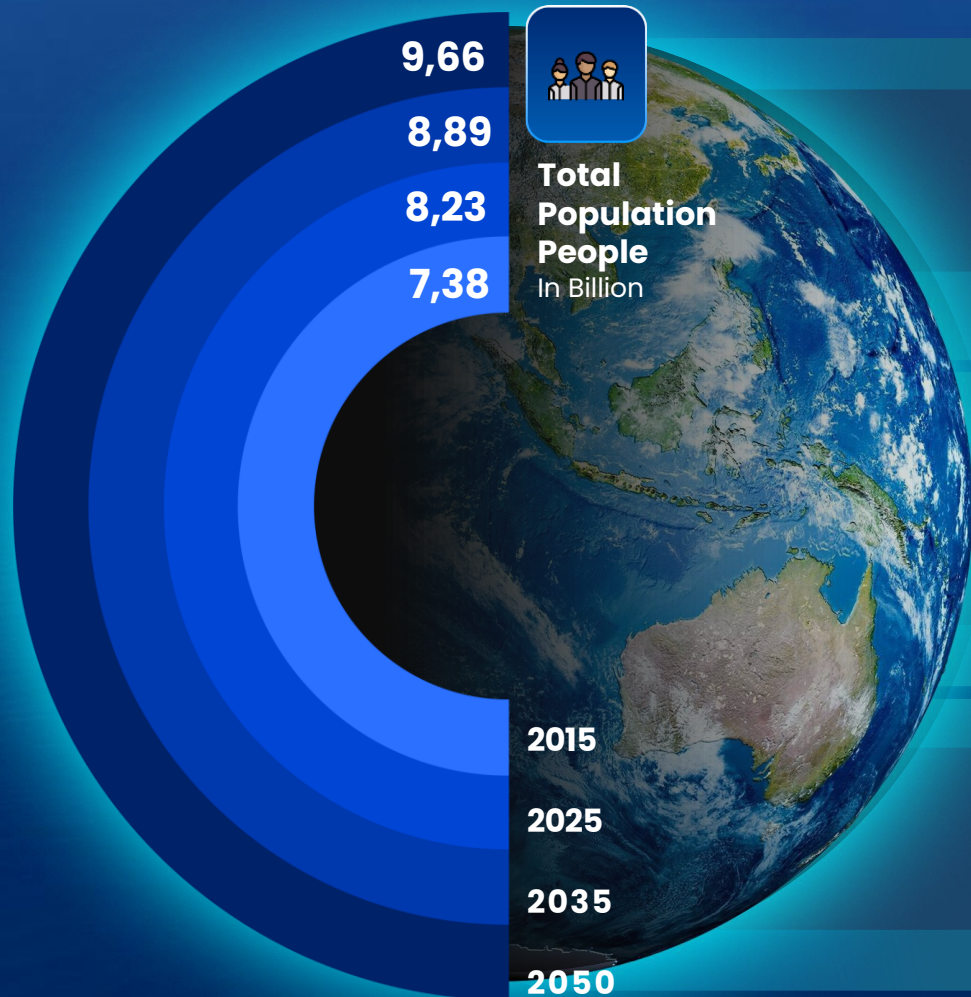
KKP
2026
#GROWSTRONGER

panganbiru.

08
POVERTY GROWTH



The Growth in the World's Population Is Leading to an Increase in Food Demand



The global population is projected to increase from 8.23 billion in 2025 to 9.66 billion in 2050, resulting in an estimated **56% rise in global food demand.**

Sources: United Nations (2024); FAO/OECD (2025)



Global demand for animal-source protein is increasing, with consumption of livestock and fish products projected to rise, while **aquatic animal foods already provide at least 20% of animal protein intake for 3.1 billion people worldwide**

Sources: OECD-FAO Agricultural Outlook 2025-2034



With land and freshwater increasingly constrained, **blue foods are emerging as a strategic food source for the future potentially adding 21-44 million tonnes of sustainable food by 2050.**

Sources: Costello, C. et al. (2020), The future of food from the sea, Nature 588, 95-100

Global Blue Food Market Projection



Global Blue Food Market Projection in 2030

By Region



Projected Global Blue Food Market in 2030

Komoditas



Key Drivers

-  Sustainable aquacultures practices
-  Advancement of technology in harvesting and processing
-  Growing consumer awareness of the benefits of fish
-  Globalization of seafood trade
-  Expansion of *direct-to-consumer platform*
-  Product innovation in the fisheries sectors

Challenges to Scaling Blue Food: Global and Indonesia

1



Sustainable Fish Stocks



Global

62.4%

of assessed marine stocks were biologically sustainable (2023).



Indonesia

35%

of assessed fish-stock units were over-exploited; 54% were fully exploited.

2



Climate & Environmental Risk



Global

>90%

of global blue food production faces substantial environmental risk.



Indonesia

15–26%

Fisheries economic returns could fall by 2050 without adaptation.

3



Pollution & Ocean Health



Global

~11 million tonnes

of plastic enter the ocean each year.



Indonesia

41.68%

Marine plastic leakage fell from the 2018 baseline by 2023, but leakage remains significant.

4



Sustainable Aquaculture



Global

53%

Aquaculture supplied of global aquatic animal production in 2024.



Indonesia

60–70%

Feed accounts for aquaculture production costs.

5



Inclusive Value Chains



Global

two-thirds

Small-scale fisheries and aquaculture provide two-thirds of aquatic foods for human consumption and support 100+ million livelihoods.



Indonesia

>3 million

fisheries business actors; ~90% are MSMEs; fisheries received ~1.5% of national KUR in Q1 2026.

The Blue Economy for a Indonesia Emas



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Protecting the ocean
and its resources

Reducing pressure and environmentally
unfriendly fishing activities.

Preserving marine
areas



**Marine
Protected Area
Expansion**



**Quota-Based
Fisheries
Management**



**Sustainable
Development of
Marine, Coastal, and
Inland Aquaculture**



**Supervision and
Control of Coastal
Areas and Small
Islands**



**Marine Plastic Waste
Cleanup through a
Fishermen's
Participation
Movement**



Objective: To expand protection, reduce the pressure/negative impacts of human activities, and conserve and maintain the sustainability of marine ecosystems, their ecosystem services, and carbon sequestration.

National Priority Work Program 2025–2029: Marine and Fisheries Sector



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6

National Priority Work Program

Food Sovereignty Cluster

The directive issued by the
President to the Ministry of Marine
Affairs and Fisheries (KKP)

Development of the
Merah Putih Fishing
Villages (KNMP)

5,000 Location

Revitalization of Fish
Farming Ponds in the
North Coast of Java

14,000 Ha

Integrated Shrimp
Farms

2,000 Ha

Village-Based
Thematic Aquaculture

40,000 Location

Modernization of
Fishing Vessels

4,582 unit

Salt Self-Sufficiency –
National Salt Industry
Hub

~2,000 Ha



1

Presidential Priority Program:
**Development of The Merah Putih Fishing Village
(KNMP)**

The Condition of Fishing Communities in Indonesia



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JUMLAH DESA NELAYAN DI INDONESIA



Source: Statistics on Indonesia's Village Potential, Statistics Indonesia (2024)

Conditions in Indonesian Fishing Villages



Densely populated
and squalid
settlements



Livelihoods depend
on the fishing
season.



Lack of facilities and
infrastructure



Limited access to
technology

Social Conditions of Indonesian Fishing Communities



3,228,209 total
of fishermen in Indonesia

Source: KKP (2025)

Fishermen's Exchange Rate is still low with
an average of **104.4** in the last 5 years



Source: BPS (2025)



AI Illustration

A Modern and Productive Merah Putih Fishing Village (KNMP) as a New Engine of Economic Growth

BEFORE INTERVENTION*

AFTER INTERVENTION*

Ilustrasi AI

Fish Production Increase Target

At every KNMP⁽¹⁾ location



10-30%

Increased fish
production at
each KNMP
location

IMPACT ANALYSIS

ON
ECONOMIC GROWTH ⁽¹⁾

Economic
Growth Formula
 $\Delta Y = S \times \%X \times MPC$

ΔY : Economic
growth
 S : Share
 $\%X$: Increase
 MPC : Multiplier Effect

Based on the results of the socio-
economic survey at the KNMP site

↑ **1%**

Capture fishery
production

↑ **0.54%**

Capture fishery
production

Economic Growth Projections for Each KNMP Location ⁽¹⁾



10-30%

Increase in capture
fishery production at
each KNMP.



5.4-16.2%

Economic Growth in
each KNMP



(Growth Engine)

KNMP will
become a new
engine of growth
for the national
economy.

Initial Model for the Development of the Merah Putih Fishing Village (KNMP)



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and Fisheries

**Case Study: KNMP Samber-Binyeri
Biak Numfor Regency, Papua Province (Constructed in 2023)**



INFRASTRUCTURE DEVELOPMENT



Dock



Ice Factory



Boat Mooring



Cold Storage
Warehouse



Culinary Hub



Coolbox
Shelter



Training
Center



Fish Auction
Market



Supply Kiosk



SPBN



Performance Evaluation of the Merah Putih Fishing Village in Samber-Binyeri Village, Biak Numfor Regency, Papua Province



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IMPROVING THE WELFARE OF FISHERMEN

89

Fisherman

445

Fisherman's Family

67

Boat

Fishermen's Terms of Trade

Before

109

Source: BPS



After

113.2

BPS Laspeyres method calculation

Fish Shipment from KNMP Samber-Binyeri



Volume

295 ton



Nilai

IDR 4.75 Billion

BITUNG

Sulawesi Utara

**KNMP
Samber-Binyeri**

JAKARTA

DKI Jakarta

SEMARANG

Jawa Tengah

SURABAYA

Jawa Timur

Annual average

FISHERMEN'S INCOME

+78%

(IDR
million/month/fisherman)

7,73

4,35

Sebelum

Sesudah

FISH PRODUCTION

+103%

(kg/month/fisherman)

904

446

Sebelum

Sesudah

FISH SALES

+47%

(IDR
million/month/fisherman)

15,87

9

Sebelum

Sesudah

Before

The catch was intended
solely to meet local needs.



After

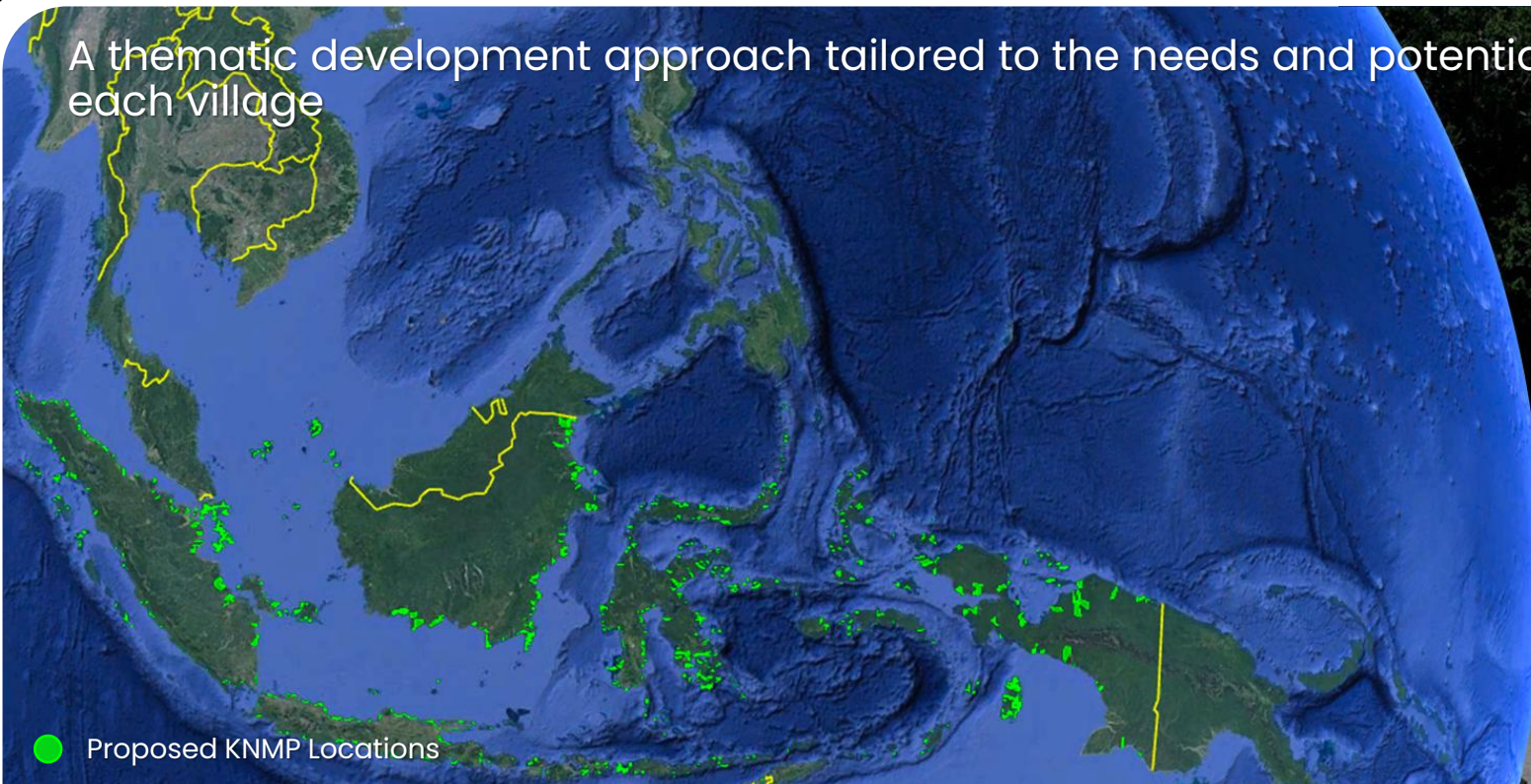
The fish are not only intended to meet local
demand but are also shipped to other cities
in accordance with industry standards.

Development Plan (2025-2029)

Merah Putih Fishing Village (KNMP)



A thematic development approach tailored to the needs and potential of each village



● Proposed KNMP Locations

KNMP Development Plan (2025-2029)

2023	2025	2026	2027	2028	2029	Total
1*	100	1,269	1,000	2,000	631	5,000

*Pilot Model: Samber-Binyeri Village, Biak

Replication of the Samber-Binyeri, Biak model

OUTCOME



Improving fishers' productivity



Enhancing fishers' income and well-being



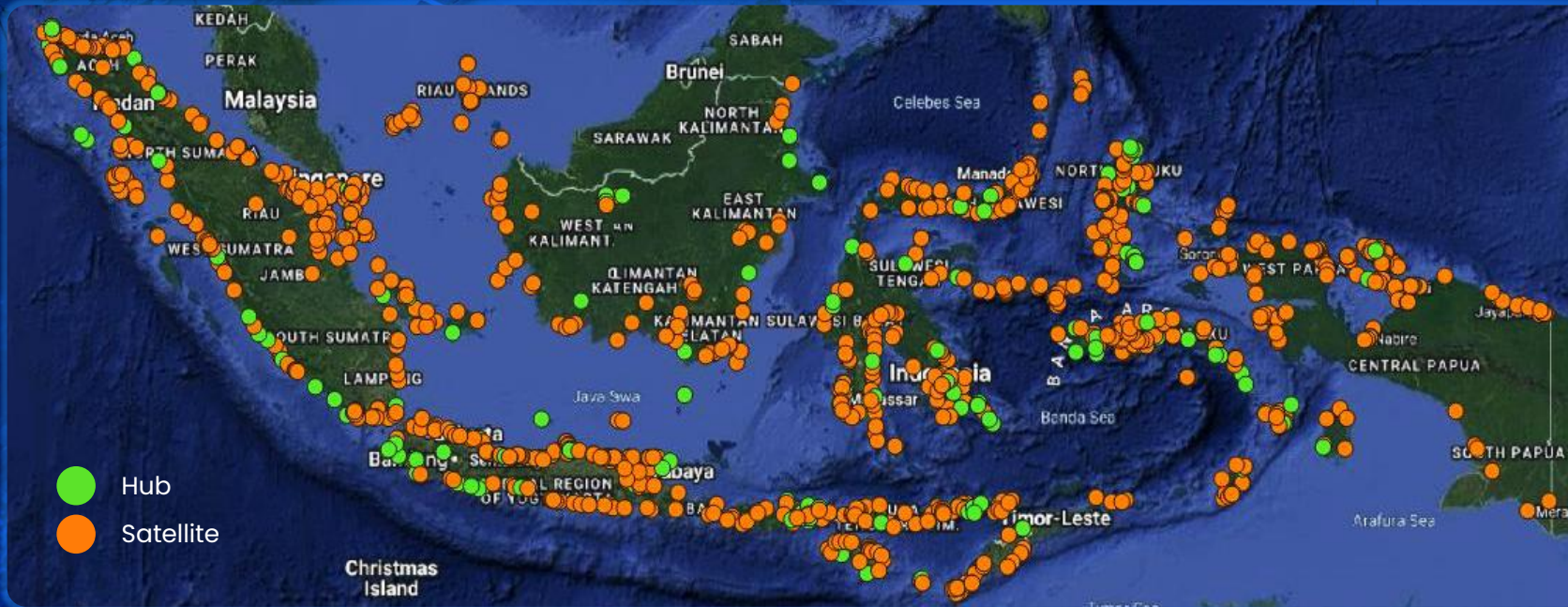
Creating employment opportunities



AI Illustration

Development of Merah Putih Fishing Village (KNMP)

A thematic development approach tailored to each village's needs and local potential.



NUMBER OF LOCATIONS

1,369
Locations
Fishing Villages

NUMBER OF BENEFICIARIES

~563,600 **~2.2 million**
Fishers **million Fisher**
Households

OUTCOME



Establish productive business units under **KDKMP**



Generate an estimated **~2.82 million tons of fisheries production per year**, valued at **Rp56 trillion / USD 3.3 billion**



Increase average fisher income to **Rp7.7 million per month**



Create employment opportunities for around **~50,000 people**



Support the growth of coastal **micro-enterprises**, including fish processing, culinary businesses, and related services



Strengthen **exports** of nationally caught fishery products

An aerial photograph of a large-scale fish farming operation at sunset. The image shows a grid of rectangular ponds separated by concrete walkways. The sun is low on the horizon, casting a warm orange glow across the water and the sky. In the foreground, there are several small buildings, including a two-story white structure with a blue roof and a smaller blue building. A car is parked on a paved area near the buildings. The overall scene depicts a modern and organized aquaculture facility.

2

Presidential Priority Program
**Revitalization of Fish Farming Ponds in the North Coast
of Java (~14,090 Hectares)**



Priority Programs for 2025-2028

Revitalization of Fish Farming Ponds in the North Coast of Java (~14,000 Ha)

PHASE I: WEST JAVA



AREA

~14,090 Ha

Phase I: West Java

INTERVENTION



Development of cultivation areas

Production ponds, reservoirs, WWTP, etc.



Infrastructure development of areas and management areas

Roads, embankments, green areas, offices, etc



Development of supporting industrial areas

OUTCOME



Estimated production volume
~800 thousand tons/year

- **Bekasi:** ~250 thousand tons/year
- **Karawang:** ~350 thousand tons/year
- **Subang:** ~100 thousand tons/year
- **Indramayu:** ~100 thousand tons/year



Estimated production value
~USD 1.2 billion/year*
(Rp20 Trillion)



Labor absorption
~83,300 peoples**

- **Upstream:** ~6,300 People
 - **On-farm:** ~16,000 People
 - **Downstream:** ~61,000 people
- **Outside of non-permanent labor (construction)



Growing **upstream industries** (quality and efficient feed and superior seeds) and **downstream industries** (fish processing and cold chain)

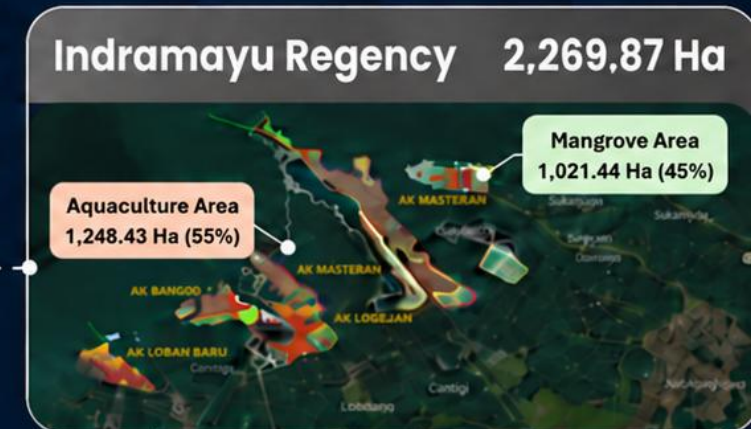
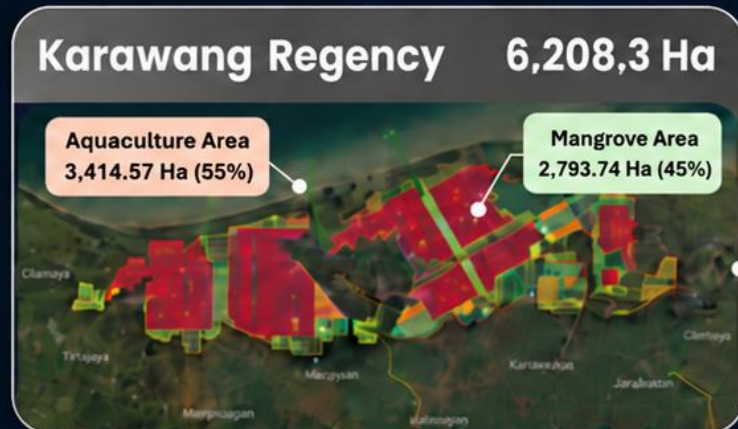
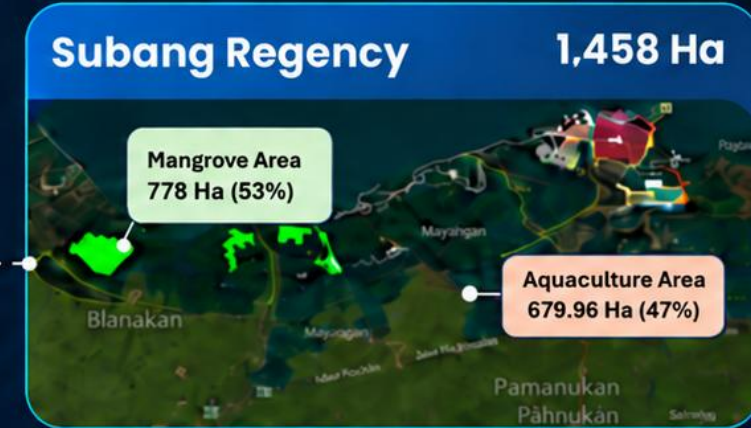
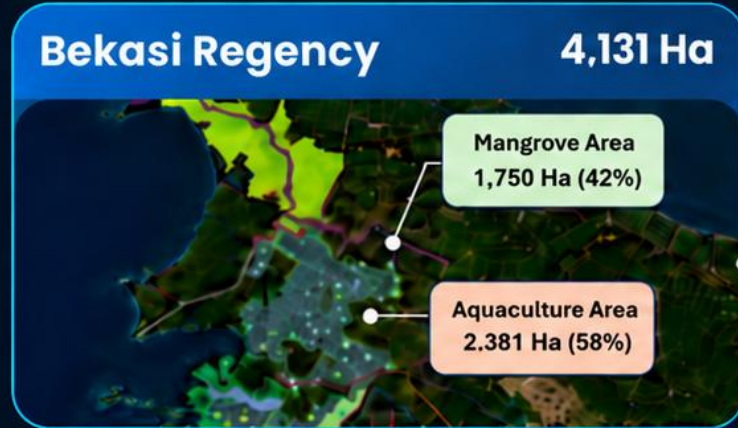
*Assuming KURS 1 Dollar = Rp17,000, 1 kg of them = Rp26,000

Basic Design of Revitalization of Fish Farming Ponds in the North Coast of Java

Summary of Area By Regency



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Mangrove Area

Mangrove Protected Area to maintain the balance of the ecosystem and environmental quality



Aquaculture Area

The designated areas for fisheries cultivation are cultivation ponds and construction figs



Remarks

Area area data refers to the results of the most recent spatial analysis



3

Presidential Priority Program
**Development of an Integrated Shrimp Farming in
Waingapu, NTT**

Development of Integrated Shrimp Farming in Waingapu, East Sumba



EAST SUMBA, NTT

Palakahembi Village and
Watumbaka Village
Pandawai District, East Sumba
Regency, NTT

AREA OF BUILT LAND

~2,000 Ha

Integrated Shrimp Farming
Pond Area

INTERVENTION



Construction of
production ponds



Construction of
reservoirs and WWTP



Supporting Industrial
Areas



Regional facilities and
greening

OUTCOME



Estimated shrimp production
volume

~52,000 tons/year



Estimated shrimp production
value

~USD 240 million/year
(Rp4 Trillion)



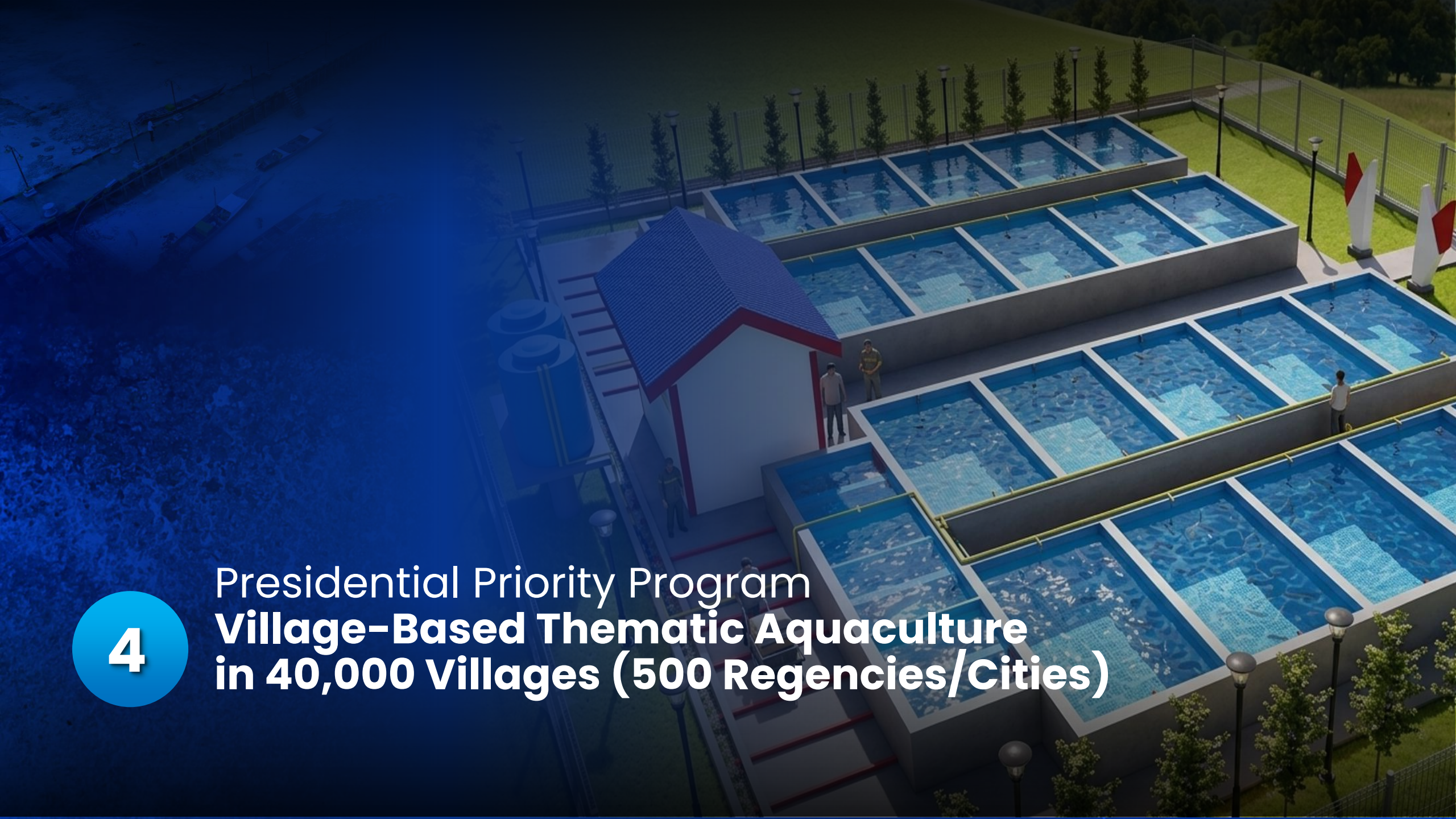
Labor absorption

~7,000 peoples*
(3,000 local workers)

- **Upstream:** ~300 People
 - **On-farm:** ~2,800 People
 - **Downstream:** ~3,900 people
- *Outside of non-permanent labor
(construction)



Growing **upstream industries**
(quality and efficient feed and
superior seeds) and **downstream
industries** (shrimp processing and
cold chain industries)

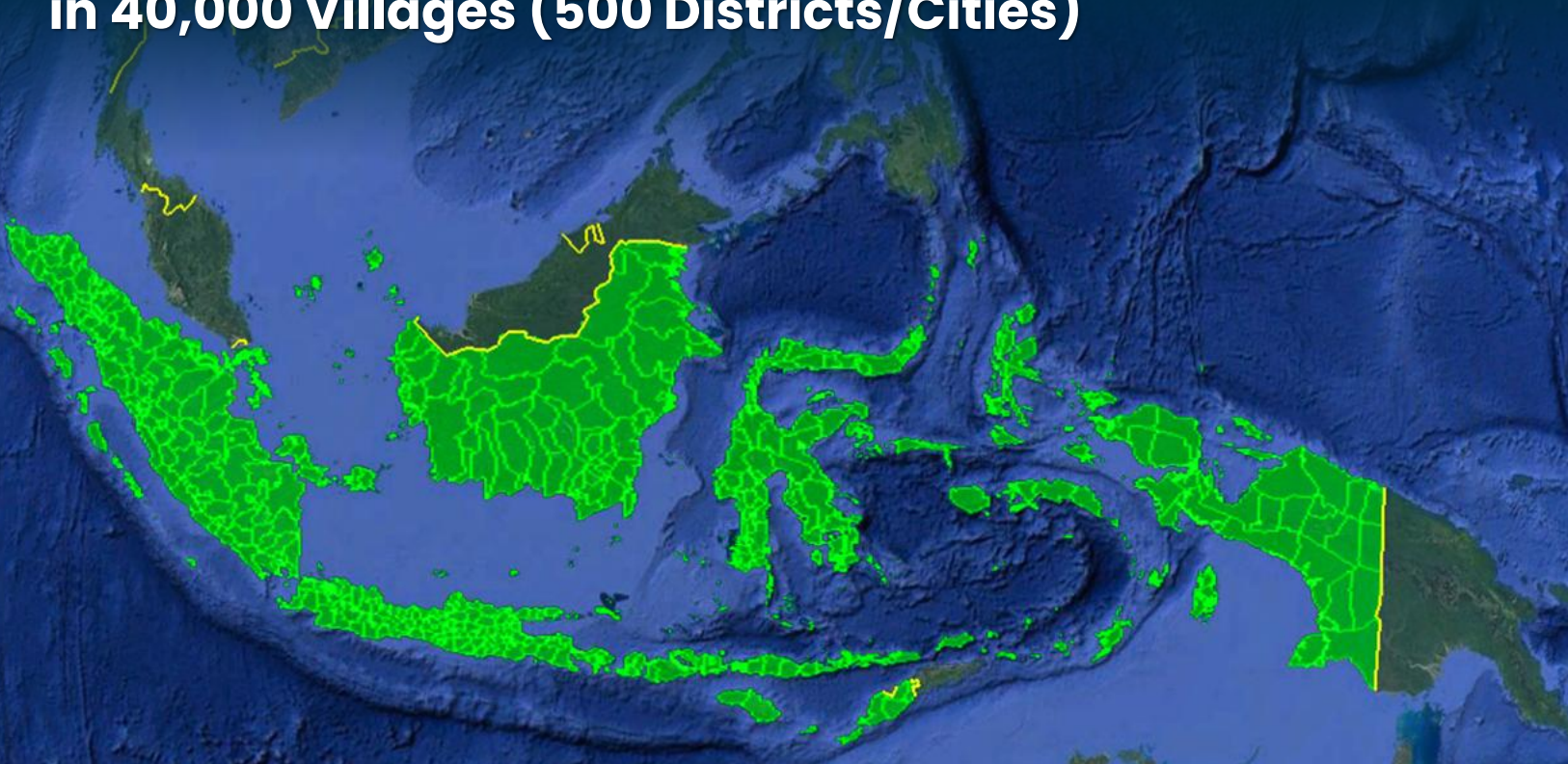


4

Presidential Priority Program
Village-Based Thematic Aquaculture
in 40,000 Villages (500 Regencies/Cities)

Priority Programs for 2025-2029

Development of Village-Based Thematic Aquaculture in 40,000 Villages (500 Districts/Cities)



Thematic Aqua Development Plan

	2025	2026	2027	2028	2029	Total
Target	100*	4,000*	10,000	20,000	6,000	40,000

*Pilot model

OUTCOME



Increasing the productivity of national fish farming



Creating an efficient upstream feed industry and superior seeds



Creates job absorption

RAS Technology (Recirculating Aquaculture System)

Aquaculture technology that treats, filters, and continuously reuses water in a closed system.

How RAS Recirculates Water

Clean water enters the tanks



Wastewater is filtered and treated before being returned to the tanks



Mechanical and biological filtration systems are used to convert wastewater into clean, reusable water.

Resource-efficient, environmentally friendly aquaculture with high productivity and adaptable system design.

Taylor Made to local and market needs



40,000 Thematic Fish Farming Locations (Mini RAS)



COMMODITY: GLOBALLY COMPETITIVE FISH



Tilapia



Catfish



Pangasius



Sea Bass



Grouper



Jade Perch

*Illustration of Thematic Fish Farming

LOCATION

~40,000 Locations

In 37 provinces

ORGANIZER

Village/Sub-district Government
with the Community

INTERVENTION



Construction of
production ponds



Construction of a
recirculation system



Construction of Feed
and equipment
warehouse



Construction of control
tanks and reservoirs

OUTCOME



Estimated production volume
~1,20 million tons/year



Estimated production value
~28,8 Trillion/year



Labor absorption
~80.000 peoples*

*Outside of non-permanent labor
(construction)



- Creating a Feed Industry of
Scale Production
- Seed Industry Superior
Production Scale



Providing fish supply to food
security



5

Presidential Priority Program: **Modernization of Fishing Vessels**

Modernization of Fishing Vessels (4,582 Units)



SHIP SPECIFICATIONS

FISHING VESSELS

Procurement of **30 GT – 1,500 GT**
fishing vessels



A total of
4,515 units

TRANSPORT VESSELS

Procurement of **200 GT – 2,500 GT**
Carrier Ships



A total of
67 units

OUTCOME



Improving the efficiency
and optimization of the
utilization of fish resources



Fishing production volume
2.3 million tons / year



Creating jobs for crew
members
58,000 people

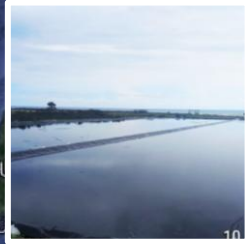


Increase in state foreign
exchange revenues,
taxes, and PNPB



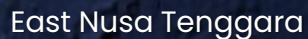
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Presidential Priority Program
Salt Self-Sufficiency Program
National Salt Industry Hub



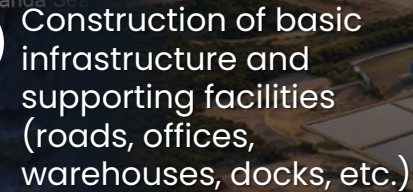
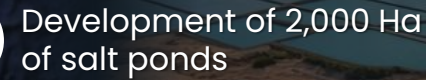
SABU RAIJUA

East Nusa Tenggara

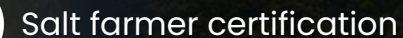
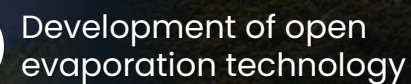
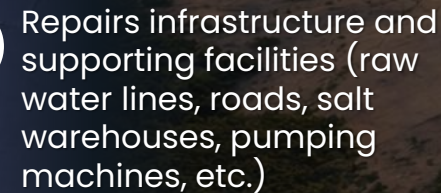


Community Ponds 70% and Industry 30%

► EXTENSIFICATION at Rote Ndao



▶ INTENSIFIKASI
in 4 Lokasi



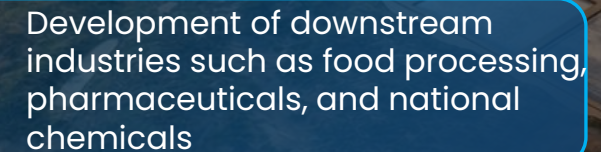
Increased productivity
with **>97% NaCl quality**



~400,000 tons / year
Substituting all imported salt for
the food industry



~7,000 peoples



Indonesia–Russia: From Dialogue to Cooperation

The growing Indonesia–Russia relationship creates opportunities for concrete cooperation in marine and fisheries.



**Sustainable
aquaculture
development**



**Modernization
of fishing fleets**



**Strengthening quality
assurance systems
for fish and fishery
products**



**Increasing the value
of fish and fishery
products**



INDONESIA



RUSSIA

Key message:

**Indonesia is always open to initiatives that
strengthen mutually beneficial marine
and fisheries cooperation with Russia.**



Strengthening Partnerships, Expanding Opportunities

Russia: A Promising Market for Indonesia's Seafood Exports



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Russia's Seafood Market and Indonesia's Exports in 2025

Russia's Seafood Imports in 2025



USD 2.3 Billion

Russia imported around
USD 2.3 billion in seafood in 2025.

Significant
Room for
Growth

Indonesia's Seafood Exports to Russia in 2025



USD 30 Million

Indonesia's seafood exports
to Russia reached nearly
USD 30 million in 2025.



Opportunities for Stronger Indonesia–Russia Cooperation



Expand market access
for Indonesian seafood
products



Increase export volume
and product diversification



Strengthen trade facilitation
and business linkages



Explore joint initiatives
in sustainable fisheries
and value-added products

INDONESIA FISHERY PRODUCTS EXPORTS BY DESTINATION COUNTRY



Ministry of Marine Affairs and Fisheries
Republic of Indonesia

PERIOD: 2023 – JULY 2026

Source: Ministry of Marine Affairs and Fisheries (KKP) – Export Statistics



INDONESIA FISHERY EXPORTS GO GLOBAL

Indonesian fishery products have reached more than 150 countries worldwide.



TOTAL EXPORT VALUE
(USD Million)

10,359.46

▲ 12.19% vs 2023



TOTAL EXPORT VOLUME
(Ton)

2,162,459.46

▲ 6.90% vs 2023

2023	2024	2025	2026 (JAN - JULY)
VALUE (USD Million) 9,228.68	VALUE (USD Million) 9,159.19	VALUE (USD Million) 9,604.63	VALUE (USD Million) 7,084.91
VOLUME (Ton) 2,023,254.60	VOLUME (Ton) 2,179,338.73	VOLUME (Ton) 2,304,543.79	VOLUME (Ton) 1,492,297.99

TOP 8 EXPORT DESTINATION COUNTRIES BASED ON EXPORT VALUE (2023 - JULY 2026)

(USD Million)

1	UNITED STATES	2,525.58	24.4%
2	CHINA	1,644.45	15.9%
3	JAPAN	1,478.25	14.3%
4	VIETNAM	1,066.56	10.3%
5	NETHERLANDS	642.74	6.2%
6	HONG KONG	381.60	3.7%
7	SOUTH KOREA	275.01	2.7%
8	SINGAPORE	262.90	2.5%
	Others	1,780.37	17.2%

KEY HIGHLIGHTS



LARGEST MARKET
United States
USD 2,525.58 Million
(24.4%)



HIGHEST VALUE
USD 2,525.58 Million
to United States

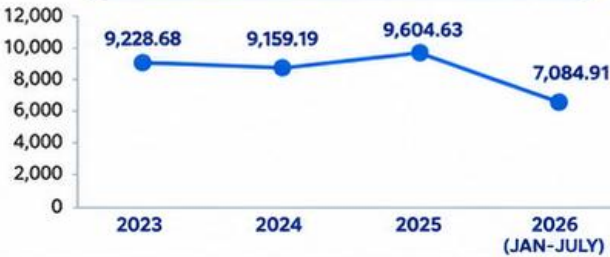


HIGHEST VOLUME
China
528,445.02 Ton

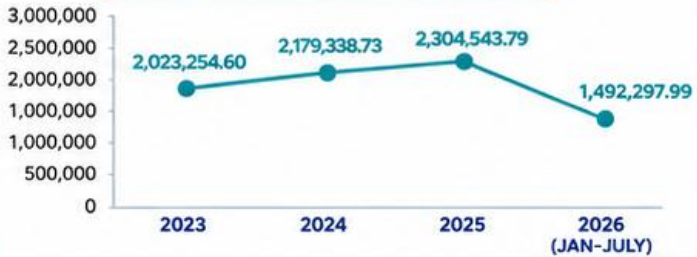


GROWTH (VS 2023)
Value + ▲ 12.19%
Volume ▲ 6.90%

EXPORT VALUE TREND (USD MILLION)



EXPORT VOLUME TREND (TON)



COUNTRY	EXPORT VOLUME (TON)				TOTAL 2023 - JULY 2026	EXPORT VALUE (USD MILLION)				TOTAL 2023 - JULY 2026
	2023	2024	2025	2026 (JAN - JULY)		2023	2024	2025	2026 (JAN - JULY)	
1 United States	391,984.15	420,550.85	434,596.43	356,691.11	1,603,822.54	1,240.78	1,153.67	1,296.58	835.55	2,525.58
2 China	478,918.10	535,081.46	562,148.51	528,445.02	2,104,660.09	1,386.68	1,370.92	1,546.23	756.62	1,644.45
3 Japan	210,019.96	201,938.19	206,680.61	164,727.06	779,425.81	1,246.27	1,127.77	1,242.97	460.24	1,478.25
4 Vietnam	213,513.49	234,906.99	216,913.04	193,249.76	878,583.28	969.00	1,014.29	1,174.90	558.37	1,066.56
5 Netherlands	128,219.63	135,575.68	139,582.32	119,429.33	523,995.96	600.09	541.06	604.54	221.07	642.74
6 Hong Kong	85,062.59	90,099.66	92,777.91	111,740.82	312,126.98	313.80	320.02	359.79	69.68	381.60
7 South Korea	61,435.26	69,432.65	76,418.64	73,716.31	273,998.16	210.48	224.64	242.33	107.56	275.01
8 Singapore	45,278.72	48,944.71	48,670.14	52,023.05	194,796.62	191.88	193.97	235.23	69.12	262.90
Others	408,768.36	443,709.87	513,261.19	392,267.54	1,757,970.95	1,056.00	1,200.07	1,229.56	511.69	1,780.37
TOTAL	2,023,254.60	2,179,338.73	2,304,543.79	1,492,297.99	7,999,435.11	9,228.68	9,159.19	9,604.63	7,084.91	35,077.40





Ministry of Marine Affairs and Fisheries
Republic of Indonesia

Thank You



Kementerian Kelautan dan Perikanan



Kementerian Kelautan dan Perikanan RI



Kkp.go.id



@kkpgoid



@kkpgoid



Kkp.go.id



KKPPodcast



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