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Transformation of Fishery Logistics Cold Chain System in Indonesia

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PREFACE: CURRENT LOGISTICS POLICIES AND PERFORMANCES

1

Indonesia has established a National Logistics System Implementation Policy (Sistem Logistik Nasional/SISLOGNAS) issued through the Presidential Regulation/PR No.26/2012:



Goals of the Policy: To ensure movement of goods; to reduce the economic high cost; to solidify national competitiveness; to safeguard the environments; and to improve the society wellbeing.



Main approaches: (1) Nationally integrated and globally connected supply chain management system; (2) Ship follows the trade, and ship promotes the trade; (3) Establishment of six governance keys: on main commodities; on logistics practitioners and services; on infrastructures and ports (2 international hub ports: in Bitung, North Sulawesi and Kuala Tanjung, in North Sumatera); on regional distribution centers; stream lining/harmonization of regulations; and on establishment of information and technology based logistics system (Presidential Instruction No.5/2020).



Logistics is denoted as part of planning process of the supply chain management system which covers procurement, storage, transportation, distribution and last miles deliveries.



Cold chain logistics is part of the supply chain system on ways to ensure the fulfilment of required environment temperature on products storages throughout collection/harvest, production and distribution to the consumers phases. The cold storage management is the overall cold storage activities including analysis, measurements, control, documentation and validation being effectively and economically executed.



Ministry of Marine Affairs and Fishery introduced the National Fishery Logistics System (SLIN) with main focus to expedite fishery distribution flows and Fish quality control by using a new application system called STELINA (Traceability and supply chain of fish distribution) in order to reduce logistics cost and maintain quality compliance.

2

National Logistics Performances:



In the last few years Indonesian logistics cost and percentage of the national GDP is 22% (2019). Singapore: 8,0%, Viet Nam: 8,5%, Malaysia: 13,0%, Thailand: 15,0%.



Based on the Word Bank's Logistics Performance Index (LPI) 2019, Indonesia ranks 46 (score 3.15 (1-5 scale)). Malaysia ranks 41 (score 3.22), Viet Nam ranks 39 (score 3.27), Thailand ranks 32 (score 3.41). Measured performance aspects are inputs on supply chains, i.e.: customs clearance, infrastructure quality, competence on logistics services, ability on track-and-trace on consignee, and delivery time.

COMPETITIVENESS CHALLENGES TO INDONESIAN FISHERY

1

Global fishery demand (2020) about 178 million tons (157 million tons for human consumption and 21 million tons for non-direct consumption) valued at about USD 406 million. Indonesia ranks No. 10, with total production of 23.16 million tons

2

The main problem with the supply and competitiveness of Indonesian fishery is the inadequate cold chain logistics, which contribute to:



Many of domestic consumers purchase preserved fishery products which are not in accordance with the concept of Good Manufacturing Practices.



Absence of national fishery standard implementation on quality (grading) due to weakness of supervision on quality compliances (traceability) due to difficulties to reach far away and remote fishery catch locations, and also weakness of governance in most of fishery ports throughout Indonesia.



Insufficient cold chain facilities. Currently (2022) there are 194 cold storages throughout Indonesia, with total storage capacity of 96,635 million tons: 32 owned by government (capacity 3,395 million tons), 21 owned by state owned companies (capacity 7,972 million tons), and 41 privately owned (capacity 85,268 million tons). This is far below national fishery production needs of 23.2 million tons.



Consumers pay much higher price due to: (a) the number of cost centers through out the supply chain system as the existence/established logistics hubs are very few (only in Jakarta, Surabaya and Makassar); (b) inappropriate fishery catching technology and aquacultures, and (c) access to export markets.

3

Other very important issue: Scarcity of certified human resources and limited logistics competence/training institutions, thus many fishery companies have no logistics/supply chains capacity.

NEEDS FOR OTHER COUNTRIES SUPPORTS AND BUSINESS OPPORTUNITIES

1

Indonesia (population: 273 million) is the largest archipelagic country needs international supports, and at the same time, also offers many fishery related business opportunities.

2

Indonesia covers 5,174,263 KM2 area with 16,766 islands: two third are waters and they are located between Asia and Australia. Thus, Indonesia should have excellent capacity in regional logistics and need to define fishery commodities as the main focus of the development of National Logistics System.

3

Supports and/or investments are needed for:



Training centers for fisheries and aquacultures to produce certified workers;



Warehouse, cold storages, cold chains delivery boxes, controlled atmospherics storages, and bio-technologies;



Cold chains hubs and fisheries aggregators;



Development of logistics cold chains start-ups;



Special Economic Zones;



Transshipment fishing areas (warehousing, oil bunkering or floating storage unit, ship-to-ship, floating processing unit, and other transshipment area facilities);



Modern fishing vessel shipyard, including solar or electric vessels;



Fishery Auctions markets/facilities;



Operating fishing port or support to develop international eco-fishing ports.

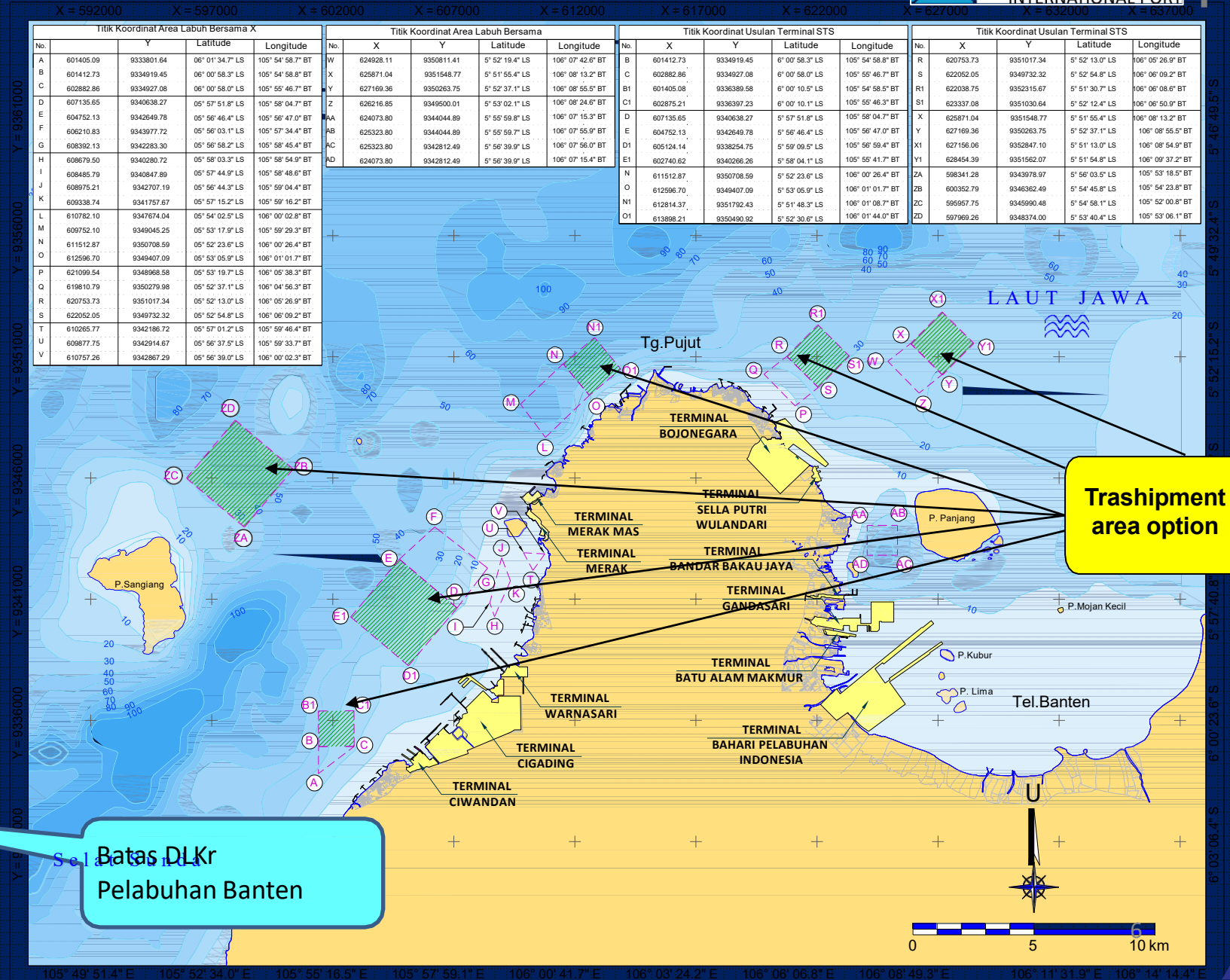
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PROPOSED TRANSHIPMENT AREAS



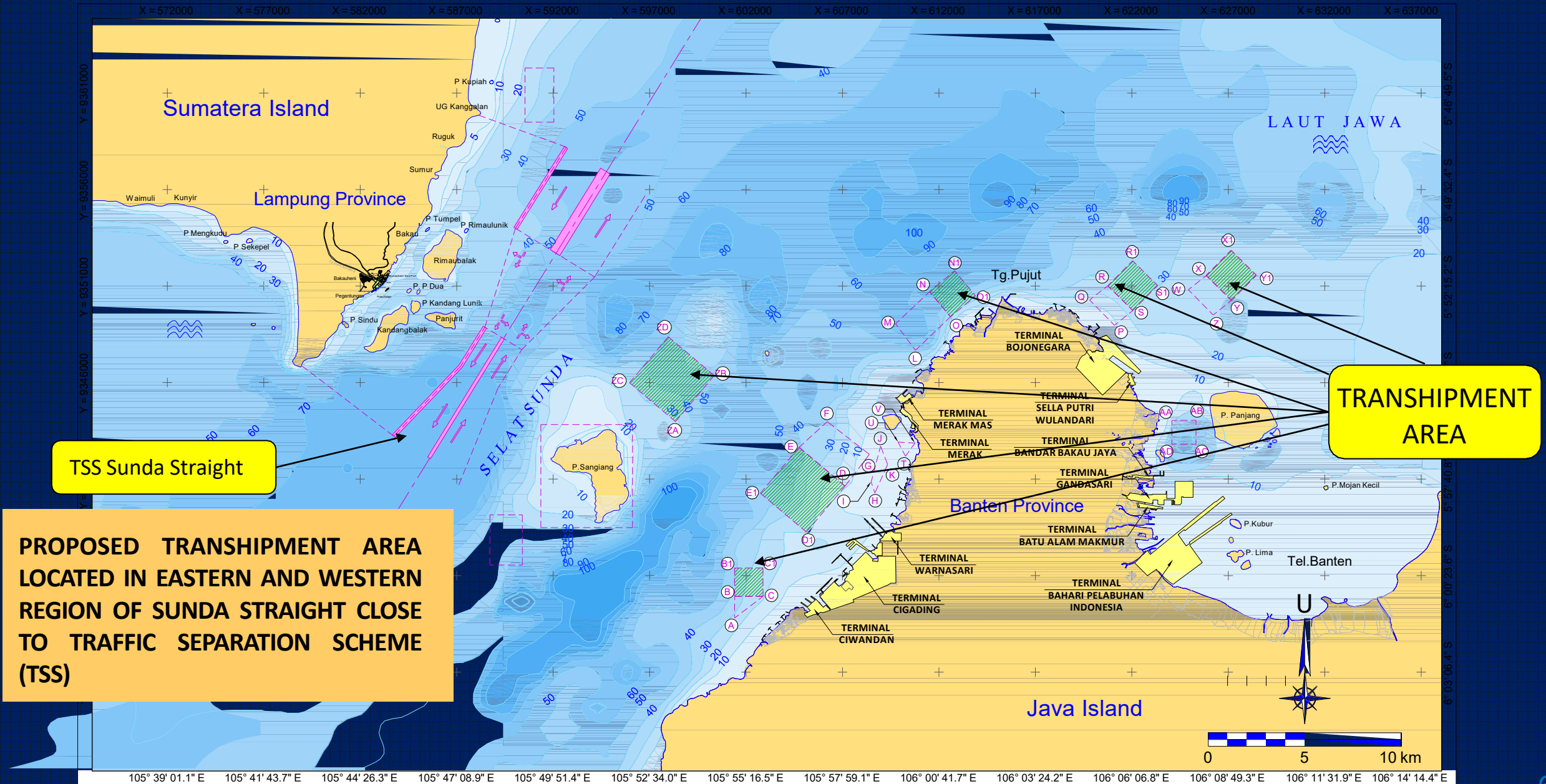
Option for Transshipment area facilities, including oil bunkering, cold storage, warehousing, ship to ship activities, floating processing unit, fishery auctions markets/commodity exchange, vessels lay-up, etc. located on Sunda Strait, close to Sangiang Island as part of Krakatau International Port, the biggest bulk port in the region.



Sel Batas DLK
Pelabuhan Banten

Trashipment
area option

LOCATION OVERVIEW AGAINST TRAFFIC SEPARATION SCHEME





THANK YOU

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