

Indonesia Shrimp Market, By Species (Penaeus Vannamei, Penaeus Monodon, Macrobrachium Rosenbergii, Others), By Source (Aquaculture, Wild), By Distribution Channel (Hypermarkets & Supermarkets, Convenience Stores, Specialty Stores, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

Indonesia shrimp market was valued at USD 854.92 Million in 2024 and is expected to reach USD 1,132.64 Million by 2030 with a CAGR of 4.8% during the forecast period. The Indonesia shrimp market is experiencing robust growth, driven by rising domestic consumption, expanding export opportunities, technological advancements in aquaculture, and strong government support for the fisheries sector. As one of the largest shrimp producers globally, Indonesia benefits from its extensive coastline, favorable climatic conditions, and established expertise in shrimp farming, particularly for high-demand species like vannamei. Global demand for shrimp, especially from key markets such as the United States, Japan, and the European Union, continues to strengthen due to increasing consumer preference for protein-rich and low-fat seafood, creating lucrative export prospects for Indonesian suppliers. The government's push for sustainable aquaculture practices, including certification programs, disease control measures, and traceability systems, is enhancing the country's competitiveness and meeting the stringent quality standards of international buyers. Technological adoption in farming operations—such as automated feeding systems, water quality monitoring sensors, and data-driven farm management—has improved yield efficiency and reduced operational risks.

Additionally, the shift toward eco-friendly and responsible production methods, supported by global sustainability certifications like ASC (Aquaculture Stewardship Council), is enabling Indonesian shrimp to command premium prices in export markets. Domestic demand is also on the rise, supported by a growing middle-class population, increased seafood awareness, and the expansion of modern retail and online grocery platforms that make shrimp more accessible to urban consumers. Rising disposable incomes and evolving dietary habits are encouraging year-round consumption, moving beyond traditional festive or seasonal demand.

Furthermore, the COVID-19 pandemic accelerated the adoption of cold-chain logistics and e-commerce platforms, which have now become permanent fixtures in the shrimp supply chain, improving distribution efficiency and market reach. The industry is also seeing investment inflows from both domestic and foreign players aiming to expand production capacity and value-added processing capabilities, such as ready-to-cook and seasoned shrimp products, to cater to changing consumer preferences and global retail formats. However, challenges remain in the form of disease outbreaks, fluctuating feed prices, and competition from other major shrimp-exporting countries such as India, Ecuador, and Vietnam, pushing Indonesian producers to innovate and differentiate through quality and sustainability. The integration of digital tools for supply chain transparency and the promotion of Indonesia's shrimp branding in international markets are further strengthening its market position. Overall, the Indonesian shrimp market's growth trajectory is underpinned by a combination of strong export potential, rising domestic consumption, technological modernization, and an industry-wide shift toward sustainable and high-quality production, ensuring its competitiveness in the evolving global seafood landscape.

Key Market Drivers

Rising Global Demand for Indonesian Shrimp in Key Export Markets

One of the strongest drivers of the Indonesian shrimp market is the sustained growth in global demand for high-quality shrimp, particularly in premium markets such as the United States, Japan, China, and the European Union. Indonesia's shrimp industry benefits from its reputation for producing species like *Penaeus vannamei* (whiteleg shrimp) and *Penaeus monodon* (black tiger shrimp), which are highly valued for their taste, texture, and consistent quality. These species cater to diverse consumer preferences, from high-end restaurants to retail frozen food categories. As seafood consumption continues to rise globally due to increasing health awareness, protein

demand, and the trend toward low-fat, nutrient-rich diets, shrimp remains one of the fastest-growing seafood commodities in international trade. Indonesian exporters are well-positioned to capture a larger share of this demand, as the country's products often meet the stringent safety, traceability, and sustainability standards required by importing nations. Free trade agreements, improved port infrastructure, and cold-chain logistics advancements are also enabling faster, more efficient delivery to export destinations, which strengthens Indonesia's competitiveness against other major suppliers like India, Ecuador, and Vietnam. Furthermore, the variety in processing capabilities—ranging from raw frozen shrimp to ready-to-eat, seasoned, and value-added products—allows Indonesian producers to tap into multiple consumer segments and adapt to changing consumption habits in overseas markets. This export-driven momentum is not only boosting foreign exchange earnings but also creating incentives for farmers and processors to increase production, adopt better aquaculture practices, and scale operations to meet the growing global appetite for Indonesian shrimp.

Key Market Challenges

Disease Outbreaks and Biosecurity Risks in Shrimp Farming

One of the most persistent and critical challenges facing the Indonesian shrimp market is the high vulnerability of aquaculture operations to disease outbreaks, which can significantly disrupt production, reduce yields, and cause heavy financial losses for farmers. Shrimp species such as *Penaeus vannamei* and *Penaeus monodon* are prone to several serious diseases, including Early Mortality Syndrome (EMS), White Spot Syndrome Virus (WSSV), and Acute Hepatopancreatic Necrosis Disease (AHPND). These pathogens spread rapidly in intensive farming environments, particularly when biosecurity measures are inadequate or water quality is poorly managed. Many small and medium-sized farms in Indonesia still rely on traditional practices with limited investment in disease prevention technologies, making them especially susceptible. Outbreaks not only affect individual farmers but can also undermine the country's overall shrimp supply and reputation in export markets, as buyers increasingly demand assurance of disease-free products. Furthermore, climate change is exacerbating disease risks by causing unpredictable temperature fluctuations, salinity changes, and extreme weather events that stress shrimp and weaken their immune systems. While larger, technologically advanced farms are adopting preventive measures like water filtration systems, pathogen-free broodstock, and closed-loop systems, these solutions require significant capital investment, making them less accessible to smaller producers. The lack of uniform biosecurity standards across the sector further compounds the problem, creating gaps in disease control and increasing the risk of

regional-scale outbreaks. Addressing this challenge requires coordinated efforts among farmers, industry bodies, and the government to implement stricter biosecurity protocols, improve farmer training, and invest in diagnostic and response infrastructure to quickly identify and contain diseases before they spread.

Key Market Trends

Growing Shift Toward Sustainable and Eco-Certified Shrimp Production

A major trend in the Indonesian shrimp market is the rapid adoption of sustainable aquaculture practices, driven by both market demand and regulatory encouragement. International buyers, especially in the European Union, North America, and Japan, are placing increasing emphasis on sourcing shrimp that meets recognized environmental and social standards. Certifications such as the Aquaculture Stewardship Council (ASC), Best Aquaculture Practices (BAP), and GLOBALG.A.P. are becoming industry benchmarks, and Indonesian producers are investing in infrastructure, training, and auditing processes to achieve and maintain these certifications. Sustainable practices include minimizing environmental impacts through reduced water pollution, implementing responsible feed sourcing, ensuring fair labor conditions, and using disease-resistant broodstock to reduce chemical and antibiotic use. This shift is not only a response to buyer requirements but also a way to command premium prices in the global market and differentiate Indonesian shrimp from competitors in price-sensitive markets. In addition, there is a growing recognition that environmentally responsible farming is essential for long-term industry stability, as unsustainable practices can lead to pond degradation, water contamination, and disease outbreaks that harm both productivity and profitability. Large-scale exporters are setting the tone by fully integrating sustainability into their operations, while smaller farms are increasingly forming cooperatives to share resources and jointly pursue certification, enabling them to compete in high-value export markets. The trend is expected to accelerate as more governments and retailers globally commit to sustainable seafood sourcing policies, making eco-certification a prerequisite for market access rather than an optional advantage.

Key Market Players

PT Central Proteina Prima Tbk

PT Charoen Pokphand Indonesia Tbk (CPI)

Pangudi Luhur Jaya Abadi Seafoods (PLJ)

PT Central Pertiwi Bahari

PT Dharma Samudera Fishing Industries

PT Suri Tani Pemuka

PT Bumi Laut Makmur

PT Lautan Tirta Nusantara

PT Sumber Alam Bahari

PT Laut Nusantara Abadi.

Report Scope:

In this report, the Indonesia Shrimp market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Indonesia Shrimp Market, By Species:

Penaeus Vannamei

Penaeus Monodon

Macrobrachium Rosenbergii

Others

Indonesia Shrimp Market, By Source:

Aquaculture

Wild

Indonesia Shrimp Market, By Distribution Channel:

Hypermarkets & Supermarkets

Convenience Stores

Specialty Stores

Online

Others

Indonesia Shrimp Market, By Region:

Java

Sumatra

Sulawesi

Kalimantan

Rest of Indonesia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Indonesia Shrimp market.

Available Customizations:

Indonesia Shrimp market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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