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Global Market Opportunities for Indonesian Aquaculture:

Golden Pomfet, Cantang Grouper, and Barramundi

REPORT





A floating net cage aquaculture (Keramba Jaring Apung/KJA) farm in the coastal waters of Lampung, Indonesia (Photo: Arghajata Consulting)

Global Market Opportunities for Indonesian Aquaculture:

Golden Pomfret, Cantang Grouper, and Barramundi

Indonesian aquaculture has significant global market opportunities for Golden Pomfret, Cantang Grouper, and Barramundi. With its extensive marine resources, diverse aquaculture commodities, and established seafood trade networks, the country has a strong foundation to expand its presence in international markets.

However, strong production potential does not automatically translate into export competitiveness. To succeed globally, Indonesian aquaculture producers must go beyond increasing output and consistently meet buyer expectations for price, quality, product specifications, and supply reliability.

To better understand these opportunities and challenges, the Feasibility and Market Assessment, supported by **COAST Facility Indonesia and Indonesia's Ministry of Marine Affairs and Fisheries (KKP),** evaluated those three aquaculture commodities.

Through domestic and international market analysis, aquaculture feasibility assessments, consultations with exporters and industry stakeholders, and field observations in **Lampung, Situbondo, Gili Ketapang – Probolinggo,** and **the Meranti Islands,** the study examined each commodity's market position and production readiness.

More importantly, the assessment goes beyond identifying potential export destinations. It explores what each commodity needs to strengthen its competitiveness, from meeting market requirements and addressing production constraints to building more reliable supply chains and commercial partnerships.

The findings highlight one key insight, it is that all three commodities offer export growth opportunities, but each requires a distinct development strategy. For Golden Pomfret, the priority is to build market recognition, validate buyer demand, and improve price competitiveness.

Meanwhile, **Cantang Grouper** can leverage existing trade channels by strengthening supply-chain coordination and aligning products with buyer requirements. In contrast, **Barramundi** must focus on improving production reliability and processing capabilities to capture opportunities in established markets.

Together, these findings demonstrate that unlocking Indonesia's aquaculture export potential requires tailored strategies that connect market demand with competitive production and reliable supply.

Building on these insights, the following sections examine each commodity's market opportunities, key challenges, and strategic priorities for sustainable export growth.



Workers handle a net inside a concrete tank at a coastal cantang grouper aquaculture facility in East Java, Indonesia. (Photo: Arghajata Consulting)

Golden Pomfret

Building Market Acceptance Before Scaling Production



Global markets have long traded various pomfret species, particularly across China, Hong Kong, Vietnam, and the Middle East. However, demand remains concentrated on black and silver pomfret, which have established market positions and strong buyer familiarity.

Against this backdrop, **Indonesia's** farmed Golden Pomfret has an opportunity to enter existing pomfret markets, but its acceptance among international buyers remains largely unvalidated. While the broader product category benefits from established demand, Golden Pomfret must still demonstrate its value to buyers who are accustomed to other species.

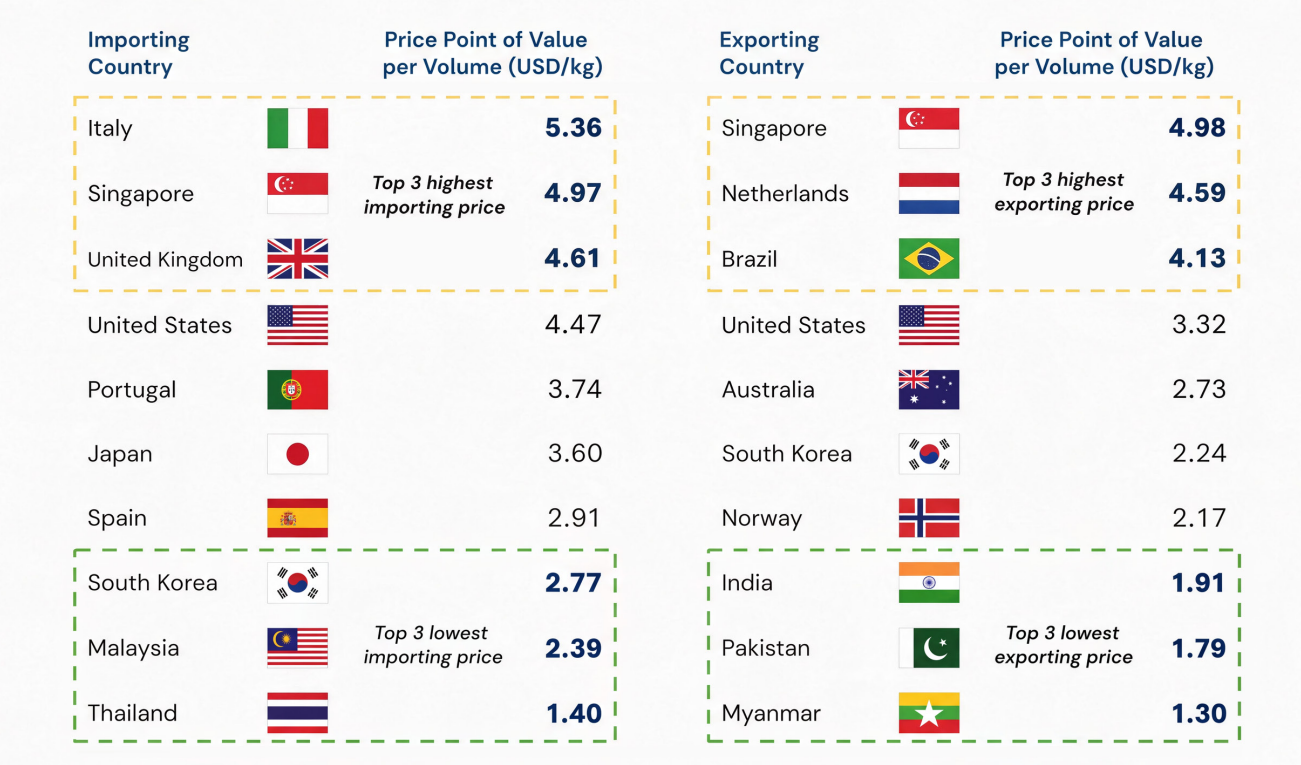
Therefore, the primary challenge is not simply identifying markets that consume pomfret, but establishing a compelling reason for buyers to choose Golden Pomfret. This requires clear product positioning, competitive pricing, and consistent quality and supply.

Market Opportunities Exist, but Price Competitiveness Remains a Key Barrier

Beyond market recognition, price competitiveness presents another critical challenge. Golden Pomfret currently commands a farm-gate price of approximately **IDR 80,000–95,000/kg**, limiting its ability to compete in international markets once processing, logistics, and export costs are considered.

For comparison, indicative international trade benchmarks for pomfret stand at approximately **USD 5.4/kg (~IDR 54,000)** in **Italy, USD 5.0/kg (~IDR 50,000)** in **Hong Kong,** and **USD 4.6/kg (~IDR 46,000)** in the **United States**.

While these benchmarks highlight potential market opportunities, they reflect broader pomfret trade rather than confirmed buyer prices for Indonesian Golden Pomfret. Consequently, exporters must validate actual buyer willingness to pay while improving production cost efficiency to establish a commercially viable export proposition.



Source: Trading Price of Pompano/Pomfret per Unit in 2024, Market Tridge

With current farm-gate prices approaching indicative international trade benchmarks, **Golden Pomfret** faces limited pricing headroom to absorb processing, packaging, logistics, and export costs. To address this gap, the assessment identifies a target farm-gate price of **IDR 60,000–64,000/kg** to strengthen export competitiveness.

However, cost reductions alone will not secure market acceptance. Indonesia must also position Golden Pomfret as a mid-to-premium farmed seafood product, differentiating it through consistent quality, reliable year-round supply, and product specifications aligned with buyer preferences.

Prioritizing Export Markets Before Scaling Production

Global Market Preferences and Their Relevance to Indonesian Cantang Grouper					
Area	Country	Market Preferences	Product Form	Key Product Attributes	Relevance to Cantang Grouper
North America	United States of America	Buyers prioritize texture, color, taste, food safety, and consistency of supply over specific types of grouper.	Frozen fillets, cuts, processed products	White flesh, mild flavor, firm texture, consistent quality, reliable frozen supply	**High**– Cantang grouper has the potential to be a raw material for cultivation for frozen fillets and processed products with a consistent supply.
Southeast Asia	Vietnam, Malaysia, Singapore	Species preferences are relatively flexible; Vietnam also has the potential to become a processing and redistribution hub.	Live fish, fresh whole, frozen whole, fillets	Competitive prices, supply availability, size uniformity	**Medium–High**– Potential entry if prices are competitive and supply is consistent, with demand dependent on buying channels and species preferences.

East Asia	China, Hong Kong	Strong preference for premium live grouper, especially Sunu and Tungsing, with trade concentrated in Hong Kong and China.	Whole live fish, whole fresh fish	Freshness, appearance, premium type, dense texture, perception of quality of caught fish	**Low–Medium**– Potential to enter the live/ fresh fish segment at a more affordable price, but less relevant to premium buyers.
Middle East	Arab Saudi Arabia, UAE, Yemen, Oman, Qatar, Kuwait	Buyers tend to choose wild-caught Mosso Grouper over farmed Cantang Grouper.	Fresh/ frozen whole fish, without head, without guts	Dense texture, large size, strong flavor, perceived quality of caught fish	**Low–Medium**– Potential is still limited because buyers prefer freshly caught Mosso Grouper.
Europe	European Union countries	The market prioritizes compliance with standards and product quality, with a trend towards demand for standardized fishery products.	Frozen fillets, cuts, processed products	Traceability, certification, food safety, hygienic handling, quality consistency	**Low–Medium**– Potential for processed products, but market access is hampered by strict requirements and limited buyer knowledge.

Source: Arghajata's Research and Analysis

The assessment highlights the need for a phased market-entry strategy, prioritizing markets with existing demand while validating buyer acceptance of Indonesian Golden Pomfret.

China emerges as an initial priority, supported by established demand for Indonesian pomfret. However, this demand largely reflects other pomfret species, making buyer validation essential before commercial expansion.

Building on this opportunity, **Vietnam** and the **Middle East** represent potential growth markets, although entry will depend on aligning product characteristics with local preferences. Meanwhile, **Hong Kong** and **Italy** offer relatively attractive indicative import prices, but require further validation of Golden Pomfret's market acceptance and commercial viability.

Looking further ahead, the **United States** presents a longer-term opportunity for whole fish and processed products, subject to buyer acceptance, competitive pricing, and market requirements.

To translate these opportunities into commercial growth, Indonesia should validate demand before committing to large-scale production. This process should combine targeted buyer outreach, product sampling, quality testing, and pilot shipments to assess product-market fit and identify viable export channels.

The resulting market feedback will guide investment and expansion decisions. If export demand remains insufficient, strengthening domestic distribution through hotels, restaurants, catering, modern retail, and premium seafood channels can provide an alternative growth pathway.

Improving Production Cost Competitiveness

Alongside market development, improving production efficiency is essential to achieving export-competitive pricing. The assessment identifies opportunities to reduce unit production costs through coordinated improvements in feed costs, seed costs, and survival rates, while maintaining commercial viability for farmers.

Golden Pomfret Production Cost Optimization Model			
Component	**Present condition**	**Moderate Scenario**	**Best Case Scenario**
1. Input and Scale of Production			
Production cycle length (months/cycles)	8	8	8
Feed volume (tons/cycle)	22,95	24,30	24,30
Feed conversion ratio (FCR)	2,50	2,50	2,50
Number of cage plots	60	60	60
Total area of the cage plot (m^2)	540	540	540
2. Production Performance			
Survival rate (%)	85	90	90
Average harvest weight (kg/head)	0,60	0,60	0,60
Total harvest volume (kg/cycle)	9.180	9.720	9.720

3. Variable Costs			
Seed price (Rp/head)	1.800	1.500	1.500
Total seed cost (Rp/cycle)	32.400.000	27.000.000	27.000.000
Feed price (Rp/kg)	22.500	18.000	16.000
Total feed cost (Rp/cycle)	516.375.000	437.400.000	388.800.000
4. Other Costs			
Supplements and medicines (Rp/cycle)	200.000	200.000	200.000
Labor costs (Rp/cycle)	32.000.000	32.000.000	32.000.000
Facility maintenance costs (Rp/cycle)	790.000	790.000	790.000
Fuel cost (Rp/cycle)	12.000.000	12.000.000	12.000.000
5. Economic Performance			
Total production costs (Rp)	593.765.000	509.390.000	460.790.000
Production cost per kg (Rp/kg)	64.680,28	52.406,38	47.406,38
Selling price of cultivators (Rp/kg)	80.000	64.000	60.000
Total income (Rp)	734.400.000	622.080.000	583.200.000
Profit per cycle (Rp)	140.635.000	112.690.000	122.410.000
Net profit margin (%)	19,15%	18,12%	20,99%

Source: Arghajata's Research and Analysis

Notes: The moderate and best-case scenarios represent simulated production improvements rather than realized outcomes. Profitability estimates assume that the entire harvest is sold at the prices specified in each scenario.

The production optimization simulation identifies three key improvement levers: reducing feed prices from **IDR 22,500** to **IDR 16,000/kg,** lowering seed costs from **IDR 1,800** to **IDR 1,500/fish,** and increasing survival rates from **85%** to **90%**.

In particular, improving survival rates could increase harvest volumes from **9,180 kg** to **9,720 kg** per cycle, without increasing the initial number of fish stocked.

Together, these improvements could reduce unit production costs by approximately **19–27%,** from **IDR 64,680/kg** to **IDR 47,406–52,406/kg**. However, achieving these gains will depend on farming conditions, effective supplier partnerships, and the ability to secure buyers for the resulting harvest volumes.

Ultimately, Golden Pomfret's export competitiveness depends on advancing two complementary priorities, it is building validated market demand and improving production cost efficiency. While the first establishes a commercially viable route to market, the second strengthens the ability to compete on price without compromising product quality or supply reliability.

Cantang Grouper

Strengthening Supply-Chain Integration to Capture Existing Market Opportunities



Unlike Golden Pomfret, Cantang Grouper can leverage Indonesia's established position in international grouper trade. The country already maintains export networks across key Asian markets, particularly China and Hong Kong, where demand for live grouper remains strong.

However, these markets primarily favor premium species such as Sunu, Tiger, and Mosso Grouper, limiting Cantang Grouper's direct competitiveness in the premium live-fish segment.

Instead, Cantang Grouper offers stronger opportunities in frozen and processed seafood markets, where buyers place greater emphasis on product specifications, consistent quality, competitive pricing, and reliable supply rather than species preference alone.

Consequently, the strategic priority shifts from building market recognition to strengthening supply-chain coordination and aligning production with established buyer requirements. This distinction creates a different pathway to export growth, centered on improving operational reliability and capturing demand through existing trade channels.

Global Market Preferences and Their Relevance to Indonesian Cantang Grouper					
Area	**Country**	**Market Preferences**	**Product Form**	**Key Product Attributes**	**Relevance to Cantang Grouper**
North America	United States of America	Buyers prioritize texture, color, taste, food safety, and consistency of supply over specific types of grouper.	Frozen fillets, cuts, processed products	White flesh, mild flavor, firm texture, consistent quality, reliable frozen supply	**High**– Cantang grouper has the potential to be a raw material for cultivation for frozen fillets and processed products with a consistent supply.
Southeast Asia	Vietnam, Malaysia, Singapore	Species preferences are relatively flexible; Vietnam also has the potential to become a processing and redistribution hub.	Live fish, fresh whole, frozen whole, fillets	Competitive prices, supply availability, size uniformity	**Medium–High**– Potential entry if prices are competitive and supply is consistent, with demand dependent on buying channels and species preferences.
East Asia	China, Hong Kong	Strong preference for premium live grouper, especially Sunu and Tungsing, with trade concentrated in Hong Kong and China.	Whole live fish, whole fresh fish	Freshness, appearance, premium type, dense texture, perception of quality of caught fish	**Low–Medium**– Potential to enter the live/fresh fish segment at a more affordable price, but less relevant to premium buyers.

Middle East	Arab Saudi Arabia, UAE, Yemen, Oman, Qatar, Kuwait	Buyers tend to choose wild-caught Mosso Grouper over farmed Cantang Grouper.	Fresh/ frozen whole fish, without head, without guts	Dense texture, large size, strong flavor, perceived quality of caught fish	**Low–Medium**– Potential is still limited because buyers prefer freshly caught Mosso Grouper.
Europe	European Union countries	The market prioritizes compliance with standards and product quality, with a trend towards demand for standardized fishery products.	Frozen fillets, cuts, processed products	Traceability, certification, food safety, hygienic handling, quality consistency	**Low–Medium**– Potential for processed products, but market access is hampered by strict requirements and limited buyer knowledge.

Source: Cantang Grouper Market Assessment; results of in-depth interviews (IDI) and market analysis.

The United States represents a priority market for Cantang Grouper, supported by established demand for frozen fillets and processed seafood products. Meanwhile, Vietnam and the Middle East offer opportunities for broader product formats, particularly frozen whole fish, although buyer preferences and price expectations vary across markets.

Italy presents an additional opportunity given its relatively attractive import price benchmarks, but market entry requires compliance with more stringent food safety and regulatory standards.

Against this backdrop, Cantang Grouper's export strategy should prioritize aligning product specifications with buyer requirements and strengthening existing trade channels, rather than building demand from scratch. This approach would enable Indonesia to capitalize on established market opportunities while improving product competitiveness and supply reliability.



Source: Live Grouper Fish Trade Flow, (ADMCF, 2017) (Volga, 2026)

Competitive Pricing Needs to Be Supported by More Efficient Production

Market Price Indications for Indonesian Grouper Export Routes				
Product Form	**Main Market**	**Source of Raw Materials**	**Raw Material Price (Rp/kg)**	**Export Price Indication (Rp/kg)**
Frozen fillets	US, Europe, Singapore	Other types of grouper – catches from various regions	70.000	200.000
Frozen fillets	US, Europe, Singapore	Cantang Grouper – Balinese cultivation	100.000–150.000	300.000–400.000
Frozen whole fish	Malaysia, Vietnam, Singapore, Middle East	Cantang Grouper – East Java cultivation	90.000	130.000–160.000

Frozen whole fish	Malaysia, Vietnam, Singapore, Middle East	Mosso Grouper – catch from Eastern Indonesia	100.000–150.000	300.000–400.000
Premium live fish	China, Hong Kong	Tungsing Grouper – a catch from Eastern Indonesia	250.000	400.000
Premium live fish	China, Hong Kong	Sunu Grouper – catch from Java and Natuna	400.000	900.000

Note: Prices reflect indicative transactions across different trade channels rather than national averages. The gap between raw material and export prices does not represent profit margins, as it excludes processing yields, processing expenses, logistics, and other export-related costs.

To strengthen its export competitiveness, Cantang Grouper must improve production efficiency and reduce farm-gate prices from the current **IDR 90,000/kg** toward a target of **IDR 70,000–75,000/kg**. Achieving this target requires higher productivity, more efficient feed management, and reliable access to quality fingerlings.

One key challenge is the industry's continued reliance on trash fish as feed, which can create inconsistencies in feed efficiency, harvest quality, and operational performance. To address this, farmers can gradually transition to commercial pellet feed to improve feeding practices and production consistency.

However, the economic benefits will depend on balancing feed costs against improvements in fish growth and productivity. In parallel, strengthening seed quality and farming practices will be essential to improve survival rates and maintain consistent harvest volumes.

Nevertheless, farm-level efficiency improvements alone will not ensure export competitiveness. Producers must also coordinate more closely with suppliers, traders, and buyers to translate production gains into reliable commercial supply.

Strengthening Market Access Through an Integrated Business Model

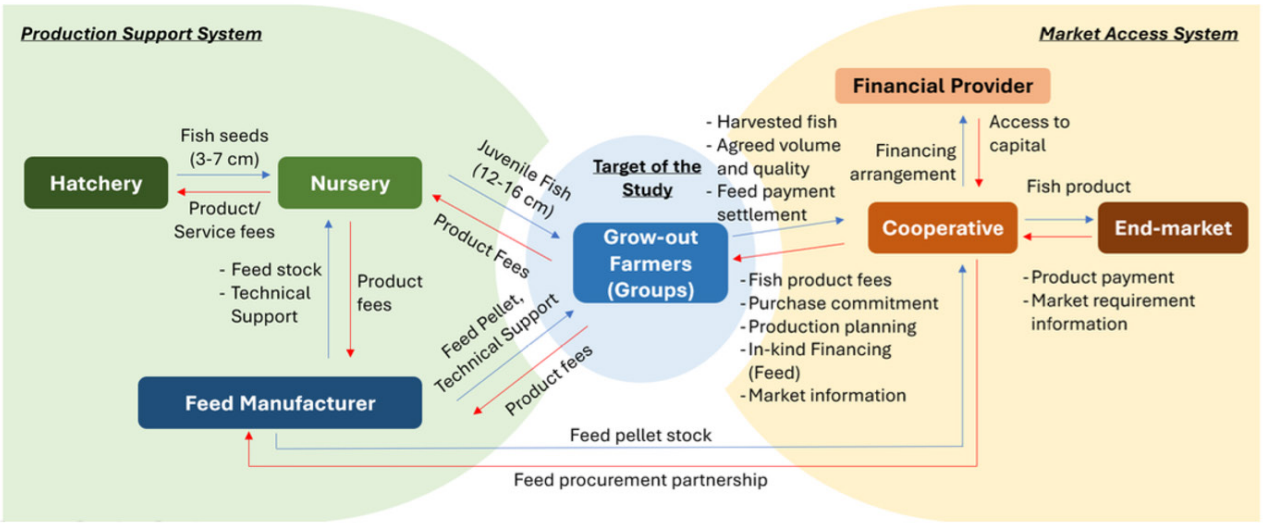
Beyond improving production efficiency, Cantang Grouper must strengthen coordination across its value chain to meet export market requirements consistently.

To address this need, the assessment proposes an integrated business model connecting hatcheries, nurseries, feed manufacturers, farmers, traders or cooperatives, and end buyers to align production with market demand.

Within this model, feed manufacturers support production planning and provide technical assistance to improve feed efficiency and farming productivity. Meanwhile, traders and cooperatives serve as key market connectors, aggregating harvest volumes, coordinating product quality and distribution, and facilitating offtake arrangements with buyers.

By clarifying responsibilities and strengthening coordination among stakeholders, the model enables more predictable production, consistent product quality, and reliable delivery, positioning Cantang Grouper to capture greater opportunities in established export markets.

Recommended Business Models for the Cantang Grouper Fish Industry



Within this model, traders and cooperatives play a central role in connecting production with market demand. They aggregate harvest volumes, coordinate quality standards, and manage distribution to ensure products meet buyer requirements.

This coordination is particularly important as export buyers require consistent volumes, standardized quality, and reliable delivery schedules. By aligning production planning with market demand, farmers can better anticipate harvest requirements, while traders and exporters can secure more predictable supply.

Ultimately, Cantang Grouper's growth potential depends not only on increasing production, but also on building an integrated and reliable supply chain capable of consistently serving international markets.

Barramundi

Converting Market Opportunities into Reliable Export Supply



While Cantang Grouper must strengthen supply-chain integration to capture existing demand, Barramundi faces a different challenge: translating established market familiarity into competitive and reliable export supply.

Barramundi already benefits from strong product recognition in several international markets, particularly Australia, where consumers widely recognize it as a food fish. This familiarity provides Indonesia with an established foundation for expanding its export presence.

However, market opportunities vary by product form and buyer requirements. **Australia** and the **United States** offer opportunities for frozen fillets and portion cuts, while Southeast Asia and the Middle East are more oriented toward fresh and frozen whole fish. Meanwhile, Europe presents selective opportunities for processed products, subject to stringent quality and regulatory standards.

Given these established market opportunities, Barramundi's strategic priority is not to build product awareness from scratch, but to strengthen production efficiency, processing readiness, and supply reliability. These capabilities will be critical to converting existing buyer interest into consistent export orders and sustainable commercial growth.

Global Market Preferences and Their Relevance to Indonesian White Snapper					
Area	**Country**	**Market Preferences**	**Product Form**	**Key Product Attributes**	**Relevance to White Snapper**
Oceania	Australia	White Snapper has become widely recognized as a local food fish, with demand from retailers, restaurants, and households. Imports have the potential to supplement domestic supply.	Fresh/chilled whole fish, frozen fillets, pieces, fillets with skin	Mild taste, firm white flesh, freshness, uniform size, hygienic handling, reliable supply	**High**– Market familiarity supports exports, but Indonesia needs to compete with domestic producers and meet stringent quality, traceability, and food safety standards.
North America	United States of America	There is increasing interest in White Snapper as a white-fleshed fish that is easy to process, especially for the retail and restaurant segments.	Frozen fillets, cuts, fillets with skin, value-added products	Mild taste, consistent quality, ease of processing, sustainability, reliable supply	**High**– Relevant for frozen and processed products, with the need to strengthen food safety, product positioning, and supply consistency.
Southeast Asia	Singapore, Malaysia	There is high familiarity with Asian Seabass, with demand supported by seafood consumption and the restaurant sector.	Fresh whole fish, live/ chilled fish, frozen whole fish	Freshness, regular supply, consumption size, balance of price and quality	**Currently**– Supported by geographical proximity, regional market familiarity, and the existence of Indonesian White Snapper supply lines.

East Asia	China, Hong Kong, Japan	There is demand for premium fishery products, but White Snapper is not yet as popular as other types of white-fleshed fish or live seafood.	Fresh/chilled whole fish, frozen whole fish, fillets	Freshness, clean taste, consistent quality, food safety	**Low**– Market opportunities exist, but require product introduction and strengthening of positioning to buyers.
Southeast Asia	Vietnam	White Snapper is positioned as a premium white-fleshed fish fillet and is used in export-oriented fishery products.	Whole fish, frozen fillets, fillets with/ without skin	Dense texture, mild flavor, processing flexibility, premium fillet quality	**Low**– Potentially competitive if the price and product form are appropriate, but Vietnam is also a strong competing supplier.
Europe	European Union countries, UK	The market prioritizes quality and adherence to standards. White Snapper has the potential to be positioned as a white-fleshed farmed fish, requiring clear labeling.	Frozen fillets, pieces, frozen whole fish	Traceability, certification, sustainability, labeling accuracy, consistent quality	**Low**– Potential for certified and traceable farmed products, but market access is more difficult due to the stringent standards and sensitivity of seabass species labeling.

Source: Arghajata's Research and Analysis

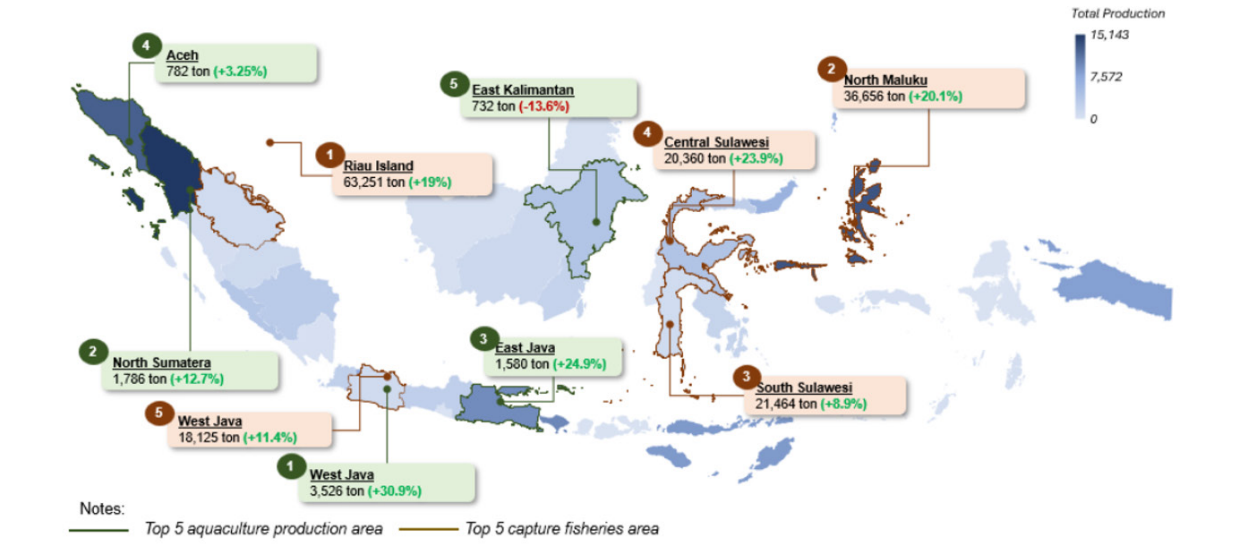
Export Opportunities Exist, but Farmed Supply Remains Concentrated in Live-Fish Trade

Despite established export demand, Indonesia faces a structural gap between its farmed Barramundi supply and the requirements of processed export markets.

In the Meranti Islands, farmers primarily market Barramundi as live fish through trading networks, including Batam-based traders serving Malaysia and Singapore. In contrast, exporters continue to rely heavily on wild-caught fish to supply frozen whole fish, fillets, and portion cuts to international markets.

This distinction highlights a critical development priority: strengthening the integration of farmed Barramundi into export-oriented processing and distribution channels. Doing so will require more consistent production volumes, competitive costs, and reliable product quality to meet international buyer requirements.

Total Production	CAGR (20-24)	Production from Aquaculture	CAGR (20-24)	Production from Capture Fisheries	CAGR (20-24)
385,199 ton	6.94%	10,565 ton	7.29%	395,764 ton	6.94%



Source: Distribution of Snapper Production in Indonesia Based on Type of Fishery Production (KKP data portal, 2024)

Therefore, established export demand for Barramundi does not necessarily translate into export readiness for farmed production. To bridge this gap, Indonesia must strengthen production consistency and expand processing capabilities to ensure farmed Barramundi can meet international buyer requirements for volume, quality, and product specifications.

Improving Production Efficiency to Capture Export Market Opportunities

Market Price Indications for White Snapper (Barramundi) Exports in Indonesia				
Product Form	**Main Market**	**Source of Raw Materials**	**Raw Material Prices**	**Export Price Indication**
Frozen whole fish	Australia, Middle East	Catches from Sumatra, East Java, Bali, and Eastern Indonesia	Rp60.000–70.000/kg	**Rp100.000/kg**
Frozen fillets and pieces	Australia, United States, Europe	Catches from Sumatra, East Java, Bali, and Eastern Indonesia	Rp60.000–70.000/kg	**Rp200.000/kg**

Source: Arghajata's Research and Analysis

The assessment highlights a key challenge to Barramundi's export competitiveness: current farm-gate prices leave limited room to capture value from international markets. Farmed Barramundi typically sells for **IDR 80,000–90,000/kg,** reaching approximately **IDR 100,000/kg** through certain trading channels in Batam. Meanwhile, indicative export prices stand at **IDR 100,000/kg** for whole fish and **IDR 200,000/kg** for fillets and portion cuts.

However, these export benchmarks largely reflect products sourced from wild-caught fisheries and are not directly comparable with farm-gate prices. Processing yields, facility costs, logistics, and export compliance requirements all influence the commercial viability of processed exports.

To close this competitiveness gap, the assessment identifies a target farm-gate price of **IDR 65,000–70,000/kg**, supported by improvements in production efficiency and productivity. Key priorities include strengthening fingerling quality, increasing survival rates, optimizing feed efficiency, and improving farming practices to deliver more consistent and cost-competitive production.

Nevertheless, increasing production volumes alone will not secure export growth. Indonesia must also strengthen quality consistency, processing readiness, and cold-chain capabilities to convert favorable market signals into reliable supply and repeat export orders.

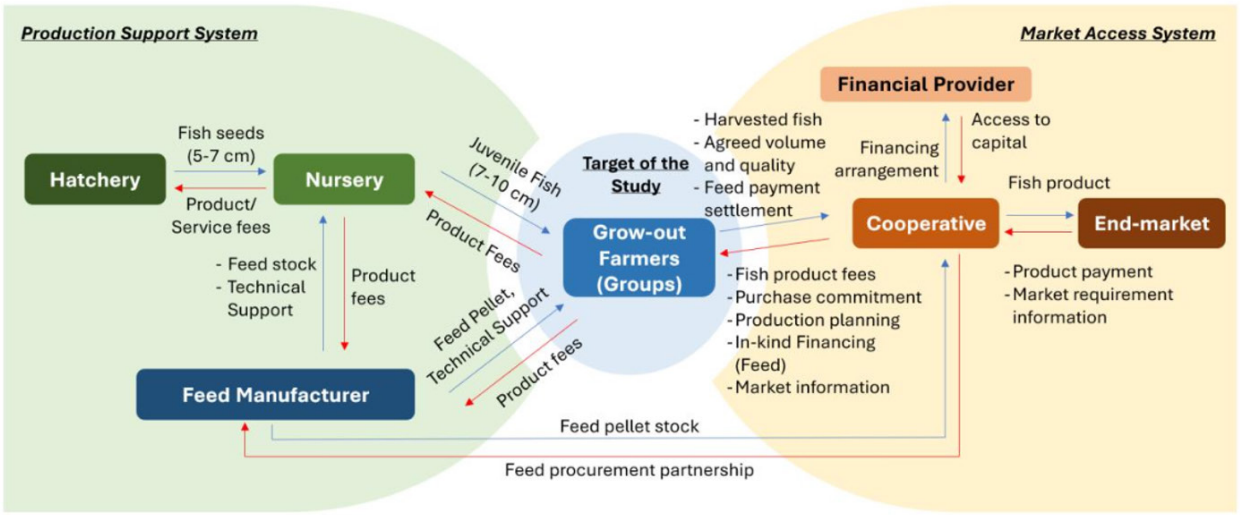
Aligning Production, Processing, and Export Markets

Building on these improvements, Barramundi's export growth requires closer coordination between farmers, processors, and exporters to align production with international buyer requirements.

Farmers must plan production around buyer specifications for fish size, quality, and volume, while processors and exporters need predictable harvest schedules and consistent supply to fulfill delivery commitments.

By connecting production planning with processing capacity and market demand, an integrated business model can strengthen supply reliability, improve operational efficiency, and enable farmed Barramundi to capture a greater share of export opportunities.

Recommended Business Models for the White Snapper Industry



Effective execution requires coordination across the entire value chain, from fingerling availability, feed supply, and harvest planning to quality control, processing, cold storage, and export logistics. In this context, long-term commercial partnerships are essential to move beyond transactional sales and establish more predictable supply arrangements and repeat orders.

By aligning production and processing with buyer requirements, an integrated supply model can strengthen farmed Barramundi's participation in export markets that currently rely heavily on wild-caught supply.



Freshly gathered Burrundi fish inside a floating net pen.
(Photo: Arghajata Consulting)

From Market Opportunities to Commodity-Specific Growth Strategies

The assessment of Golden Pomfret, Cantang Grouper, and Barramundi reveals a broader insight, export potential exists across all three commodities, but differences in market readiness and production capabilities require distinct development strategies.

For Golden Pomfret, the immediate priority is to build buyer acceptance and improve price competitiveness before scaling production. In contrast, Cantang Grouper can leverage established trade channels by strengthening supply-chain coordination and aligning product specifications with buyer requirements.

Meanwhile, Barramundi must improve farmed supply competitiveness, processing capabilities, and delivery reliability to capture opportunities in established export markets. These differences highlight why production expansion alone cannot drive sustainable export growth. Instead, each commodity requires a phased development approach that reflects its market maturity, production readiness, and commercial requirements.

Nevertheless, a common priority emerges across all three commodities: aligning market demand with competitive production and reliable distribution. Without validated demand, expanding production risks creating excess supply. Conversely, without efficient production and consistent delivery, established market opportunities may not translate into sustained export growth.

Ultimately, the path to export competitiveness lies in addressing each commodity's specific constraints while strengthening coordination across the broader aquaculture value chain.

Translating Export Opportunities into Broader Economic Value for Coastal Communities

Beyond strengthening export competitiveness, aligning market demand with production and distribution capabilities can generate broader economic benefits across Indonesia's coastal industries. As businesses gain greater visibility into buyer requirements and demand, they can plan production more effectively, improve operational efficiency, and establish long-term commercial partnerships.

In turn, more predictable demand can stimulate investment across the aquaculture value chain, from hatcheries and feed manufacturing to processing, cold storage, logistics, and distribution. Stronger processing capabilities can also enable Indonesia to capture greater value through fillets, portion cuts, and processed seafood products tailored to international market requirements.

Importantly, these developments can extend economic opportunities beyond aquaculture producers. By strengthening connections between production and supporting industries, export-oriented aquaculture growth can create new business opportunities, support employment, and increase economic participation across coastal communities.

Alongside these economic benefits, more efficient and responsible farming practices can support environmental sustainability. Improved feed management, higher production efficiency, and stronger farming standards can reduce resource inefficiencies and environmental pressures. Furthermore, expanding reliable farmed supply could reduce dependence on wild-caught raw materials, provided production remains aligned with environmental standards and local ecological carrying capacity.

Ultimately, unlocking the export potential of Golden Pomfret, Cantang Grouper, and Barramundi requires more than expanding market access. It calls for commodity-specific strategies that connect validated buyer demand with competitive production, reliable supply chains, and long-term commercial partnerships.

By addressing these priorities, Indonesia can translate global market opportunities into stronger aquaculture competitiveness, greater value creation, and more sustainable economic growth across its coastal communities.

Source and Methodology:

This article draws on the Feasibility and Market Assessment of Golden Pomfret, Cantang Grouper, and Barramundi, incorporating industry consultations, field observations, and national and international secondary data. Where species-specific trade data is unavailable, broader fisheries categories provide indicative market benchmarks rather than precise species-level demand estimates. Price figures reflect market observations and indicative benchmarks, while production efficiency targets represent simulated scenarios rather than realized outcomes.