



HDPE Boat Market Review

TOFORD - Final Presentation



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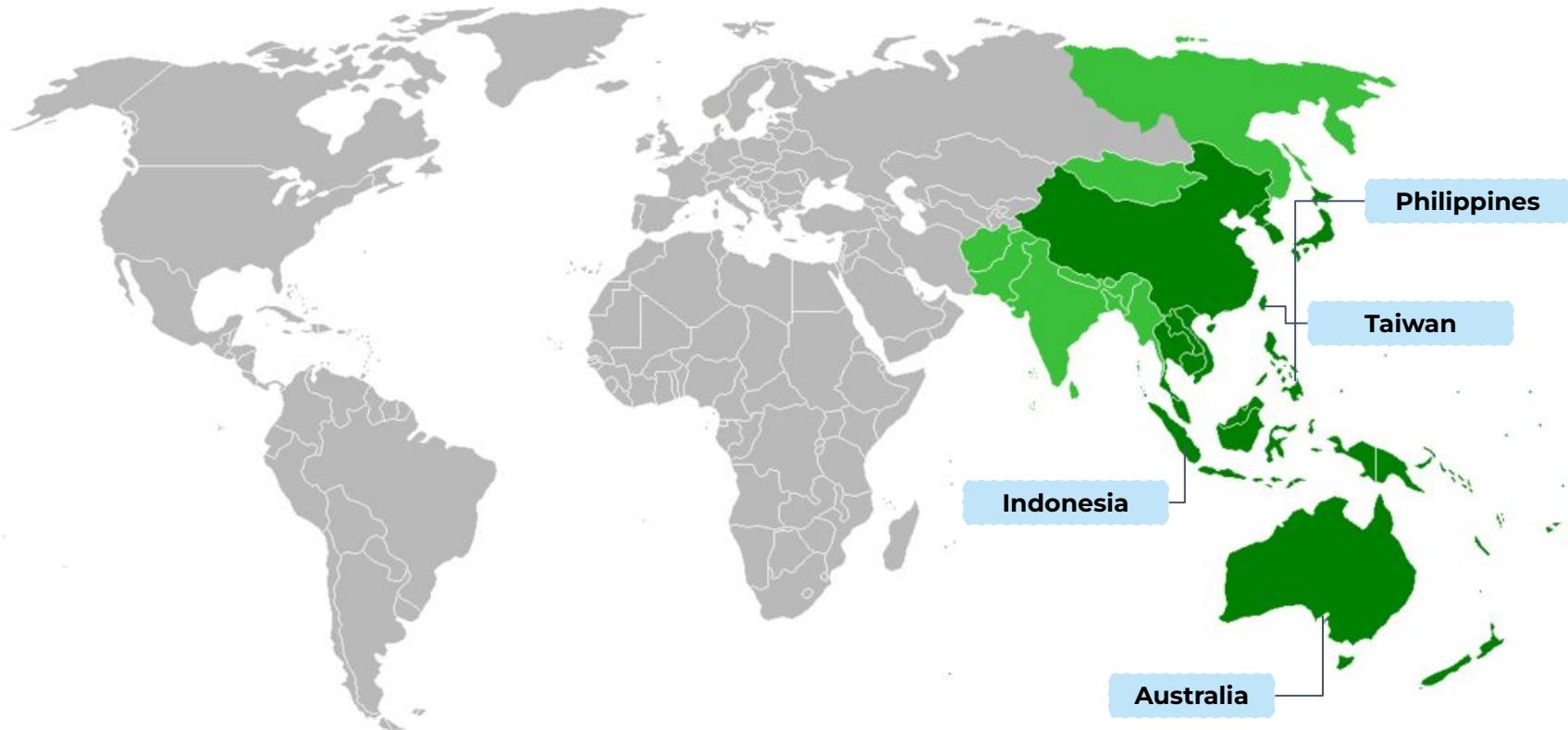


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Go to market strategy for Indonesian market





Indonesia Market Opportunities : Blue Economy



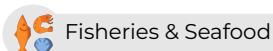
Overview of Blue Economy



The "blue economy" in Indonesia refers to the sustainable and responsible use of marine and aquatic resources

Key Focus Categories of Blue Economy:

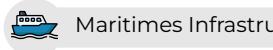
Established:



Fisheries & Seafood

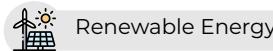


Energy & Resources

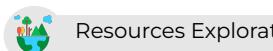


Maritime Infrastructure & Service

Emerging:



Renewable Energy



Resources Exploration

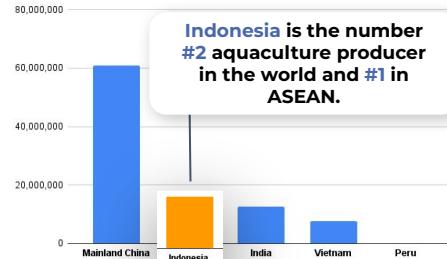


Maritime Safety and Patrolling

Indonesian Offshore Aquaculture

Aquaculture Production by Country in Tonnage (2020)

Source : OECD-FAO Agricultural Outlook (2023)



Indonesia is the number #2 aquaculture producer in the world and #1 in ASEAN.

Total Potential Area for Aquaculture

- Freshwater aquaculture (2.83m hectares) 15.80%
- Brackish water (2.96m hectares) 16.50%
- Marine (12.12m hectares) 67.70%



There is a solid need for **workboat as a vessel** for offshore aquaculture.

Fisheries Source in 2020



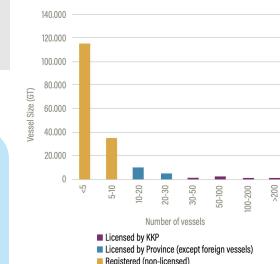
14.3% increase in Aquaculture



8.7% increase in Wild Capture Fisheries

Indonesian Vessel is Dominated by Small Sized Boat

96% of fleet comprises non-motorized vessels, onboard engine vessels, and vessels with less than 10 gross tons.





Market Segments Prioritization

1st Priority: Indonesian Offshore Aquaculture



Industry Size:

Medium to large scale aquaculture farms that require smaller boats for daily operations and nearshore activities.

Aquaculture Product:

- Tilapia
- Snapper
- Grouper

Geographic:

- North Sumatera
- Bali
- East Java

Ownership and Market Focus

Foreign-owned that focuses on producing for export products.

2nd Priority: Indonesian Sustainable Tourist Provider



Industry Size:

Medium to large Indonesian ecotourism or excursion providers.

Provided Service:

- Diving Trip
- Responsible Wildlife Encounters
- Sustainable Sport Fishing

Geographic:

- Bali
- Komodo Islands
- Raja Ampat
- Toraja

Target Consumer:

Upper Class & Premium Tourists
Sport Fishing Hobbyist
Professional or Recreational Divers

3rd Priority: Indonesian Sustainable Fishery



Industry Size:

Small to medium sized fisheries that utilize sustainable fishing method (handline)

Product Catch:

- Tuna
- Mackerel and Sardines
- Crustaceans

Geographic:

Mostly agglomerate in Eastern part of Indonesia

Certification Ownership:

MSC / ASC Fishery Certified

Market Focus

Focused on producing for export products.



PESTEL Analysis



Political: Open to Investment

Income Tax incentives under Minister of Marine Affairs and Fisheries Regulation 35 of 2022.



High Economic Growth

The targeted annual growth rate for aquaculture is 8,5% for most of the product.



SME-focused Market

Fish producers in Indonesia 80% comes from smallholders and 20% are large scale companies.



Low Technology Adaptation

The low adaptation has elevated higher risk of production failures.



Volatile Environment

Due to its tropical climate, sudden weather changes can affect the aquaculture production.

Porter's Five Forces Analysis

Threat of Substitutes

Moderate

Competitive Rivalry

Moderate

Bargaining Power of Buyer

Moderate

Threat of New Entrants

Moderate

Bargaining Power of Supplier

Low





Tier-based channel tactics

Indonesian Offshore Aquaculture

Indonesian Sustainable Fishery

Indonesian Sustainable Tourism

Touchpoints

- **Multi-channel Engagement**
 - Learn from Aquatec's strategy and PT Iqra Visindo's focus on local distribution and post-sale support.
- **Sustainability Associations and Organizations**
 - Emulate PT Iqra Visindo's emphasis on sustainability and local engagement in the fishery sector.



Direct Sales



Referral



Industry Events



Local Distributor
Partnership



Localized Online
Presence



Industry Events

PME - NOVEMBER 23

Pacific Marine Expo is the largest commercial marine trade show on the West Coast, serving commercial mariners from Alaska to California.

Experience the Expo...



Be a part of one of a year industry event that brings together commercial marine professionals across the Pacific Northwest to do business, get industry updates, and connect with both old and new friends!

Asia Pacific Maritime (APM) - MARCH 24

The premier exhibition and conference in Asia showcasing Shipbuilding & Marine, **Workboat**, Offshore, Port Technology (Marina Bay Sands, Singapore)



67%
of exhibitors
generated new
sales leads

OCTOBER 23 - The International Maritime Exhibition in Indonesia (IME)

The most anticipated international event in Indonesia (Jakarta, Indonesia)



Organised by
RX In the business of building businesses

FEBRUARY 24 - BIMP-EAGA

The biggest annual Transport Logistics Exhibition and Conference trade event in the Brunei Indonesia Malaysia Philippines East ASEAN Growth Area (BIMP EAGA)

AUGUST 24 - INAMARINE

Indonesia's Most Influential and Biggest Maritime & Offshore Event in Asia (Jakarta Barat, Indonesia)



GOVERNMENT SUPPORT

