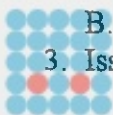




# LIST OF CONTENTS

	Page
<b>LIST OF CONTENT</b> .....	i
<b>LIST OF TABLE</b> .....	iv
<b>LIST OF FIGURE</b> .....	vi
<b>LIST OF APPENDIX</b> .....	vii
<b>I. INTRODUCTION</b> .....	1
1. Background .....	1
2. Objectives .....	6
<b>II. THEORETICAL FRAMEWORK</b> .....	7
1. Market Mechanism .....	7
A. Demand .....	7
B. Supply .....	8
2. Competitive Strategy .....	9
A. Strategy Formulation .....	9
B. Types of Strategy .....	10
3. Analytical Hierarchy Process .....	13
4. PT. Rabobank Duta Indonesia (RDI) .....	14
<b>III. SHRIMP AND TUNA DESCRIPTIONS</b> .....	15
1. Shrimp .....	16
A. Shrimp Farming .....	16
a. Shrimp Breeding .....	17
b. Shrimp Hatchery .....	19
c. Shrimp Feed Industry .....	19
d. Factors Affecting the Production of Shrimp Pond .....	20
B. Sea Shrimp .....	21
C. Shrimp Processing .....	23
2. Tuna .....	24
A. Factors Affecting the Production of Tuna .....	27
B. Tuna Processing .....	28
3. Issues in Shrimp and Tuna Industries .....	31

Hak cipta dilindungi Undang-Undang



1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
b. Pengutipan tidak merugikan kepentingan yang wajar IPB.

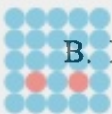
2. Dilarang mengumumkan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.



1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
b. Pengutipan tidak merugikan kepentingan yang wajar IPB.  
2. Dilarang mengemukakan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.

A. Tariff Barrier .....	31
B. TED (Turtles Excluder Devices) .....	32
C. Tuna-Dolphin Issue .....	32
D. ISO 14000 EMS for Fishery Industry .....	33
E. Mangroves .....	34
F. The Hazard Analysis Critical Control Point (HACCP) .....	34
G. Human Right .....	35
H. UNCLOS (United Nation Convention Law of the Sea) Agreement .....	35
<b>IV. METHODOLOGY .....</b>	<b>37</b>
1. Data Resources .....	37
2. Data Analysis .....	38
A. Porter Five's Model Competitiveness .....	38
B. Analytical Hierarchy Process (AHP) .....	39
C. The Internal Factors Evaluation (IFE) Matrix .....	43
D. The External Factors Evaluation (EFE) Matrix .....	43
3. Conceptual Framework .....	44
<b>V. INDONESIAN SHRIMP AND TUNA COMPANIES PROFILE .....</b>	<b>48</b>
1. PT. Perikanan Samudera Besar (Persero) .....	48
2. PT. Usaha Mina .....	49
3. PT. Triasta Citarate .....	53
4. PT. Indramas Sempurna .....	55
<b>VI. SHRIMP AND TUNA MARKETS AND SWOT ANALYSIS .....</b>	<b>57</b>
1. Shrimp and Tuna Markets Mechanism (Demand and Supply) .....	57
A. Shrimp Market .....	57
B. Tuna Market .....	63
2. Internal Analysis .....	71
A. Production .....	71
a. Shrimp Production .....	71
b. Tuna Production .....	74
B. Finance .....	76
C. Marketing .....	79
D. Research and Development .....	82
3. External Analysis .....	83
A. Economic Environment .....	83
a. International and Indonesian Economic Condition .....	83
b. International Economic Cooperation .....	85
B. Political Environment .....	87

Hak cipta dilindungi undang-undang



Program Pascasarjana Manajemen dan Bisnis  
Institut Pertanian Bogor  
**MB-IPB**



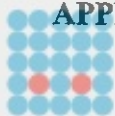
- C. Social Environment ..... 89
- D. Technological Environment ..... 90
- E. Competitiveness Environment (Porter's Model) ..... 91
  - a. Shrimp Competitiveness ..... 91
  - b. Tuna Competitiveness ..... 95
- 4. SWOT Analysis on Indonesian Shrimp and Tuna Industries ..... 99
  - A. Shrimp Industry ..... 99
    - a. Strengths ..... 99
    - b. Weaknesses ..... 100
    - c. Opportunities ..... 105
    - d. Threats ..... 107
  - B. Tuna Industry ..... 110
    - a. Strengths ..... 110
    - b. Weaknesses ..... 111
    - c. Opportunities ..... 114
    - d. Threats ..... 116
- 5. Analytical Hierarchy Process (AHP) Analysis for Indonesian Shrimp and Tuna Industries ..... 119
- 6. IFE and EFE Matrix for Indonesian Shrimp and Tuna Industries ..... 127
  - A. Indonesian Shrimp Industry ..... 128
  - B. Indonesian Tuna Industry ..... 131
- VII. FUNCTIONAL STRATEGY FOR SHRIMP AND TUNA INDUSTRIES..... 134**
  - 1. Functional Strategies for Indonesian Shrimp Industry ..... 134
    - A. Strategies and Business Implication for Shrimp Company ..... 137
    - B. Strategies and Business Implication for the Government of Indonesia ..... 139
  - 2. Functional Strategies for Indonesian Tuna Industry ..... 141
    - A. Strategies and Business Implication for Tuna Company ..... 145
    - B. Strategies and Business Implication for the Government of Indonesia ..... 147
  - 3. Opportunities for PT. RABOBANK DUTA INDONESIA ..... 148
- VIII. CONCLUSION AND SUGGESTIONS ..... 152**
  - 1. Conclusion ..... 152
  - 2. Suggestions ..... 153
- REFERENCES ..... 156**
- APPENDICES ..... 161**

Hak cipta dilindungi Undang-Undang

© Hak Cipta Milik IPB

1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
 a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
 b. Pengutipan tidak merugikan kepentingan yang wajar IPB.

2. Dilarang mengemukakan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.



Program Pascasarjana Manajemen dan Bisnis  
 Institut Pertanian Bogor  
**MB-IPB**



## LIST OF TABLES

No.	Text	Page
1.	Indonesian Export of Agricultural Sector 1993/94 - 1996/97 (Directorate General of Fisheries (1997)).....	2
2.	Indonesian Fishery Export 1993 - 1996 (Directorate General of Fisheries (1997)).....	2
3.	Indonesian Shrimp and Tuna Potentials (Directorate General of Fisheries (1991)).....	3
4.	Types of Strategy (David, 1997) .....	11
5.	The Potential Tuna in Indonesian Waters (Directorate General of Fisheries, 1997) .....	25
6.	Skipjack Catch Season in Some Fishing Areas in Indonesia (Uktolseja, 1991) .....	27
7.	Types of Tuna and Skipjack Fisheries (Puslitbangkan, 1983) .....	30
8.	The Pairwise Comparison Matrix for AHP .....	39
9.	The Example of Comparison Matrix for Each Element .....	39
10.	Fish Production & Number of Fishing Vessel of PT. PSB from 1990 - 96.....	47
11.	The Production of PT. Usaha Mina in 1996 .....	50
12.	PT. Triasta Citarate Shrimp Production from 1990 - 1997 .....	54
13.	The Comparison of Semi-intensive and Biotechnology System in Shrimp Pond.....	56
14.	Total Shrimp Production from 1991 - 1996 (in thousand mt) (Rossenby, 1997).....	57
15.	World Shrimp Production in 1996 (Rossenby, 1997) .....	58
16.	World Tuna Export and Import in 1991 - 1995 (BPEN, 1997) .....	64
17.	Shrimp Frozen Companies in Jakarta (Directorate General of Fisheries, 1997) .....	73
18.	Number of Fishing Vessel Operated in Indonesian Waters to Catch Tuna (Directorate General of Fisheries, 1997).....	75
19.	Approved Domestic Investment Projects by Agricultural Sub Sector (billion US \$) (BKPM, 1997).....	77
20.	Fisheries Projects Approved in 1997 (BKPM, 1997) .....	78
21.	Economic Growth and Inflation Rate in G7 Countries (World Economic Outlook, 1998) (International Monetary Fund, 1998) .....	83
22.	Economic Growth and Inflation Rate in Some Asian Countries (World Economic Outlook, 1998) (International Monetary Fund, 1998).....	84
23.	Country Investment Risk for Six Asian Countries (Kompas, 2 January, 1998) .....	85
24.	Goods and Services Trade in APEC Countries (in million US \$) (Kompas, 10 January, 1998).....	87
25.	The Attractiveness of Shrimp Industry .....	95
26.	The Attractiveness of Tuna Industry.....	98
27.	Weight for Internal Factors of Indonesian Shrimp Industry .....	122

1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
 a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
 b. Pengutipan tidak merugikan kepentingan yang wajar IPB.

2. Dilarang mengumumkan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.



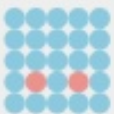




28. Weight for External Factors of Indonesian Shrimp Industry .....	123
29. Weight for Internal Factors of Indonesian Tuna Industry .....	126
30. Weight for External Factors of Indonesian Tuna Industry .....	127
31. Internal Factor Evaluation (IFE) Matrix for Indonesian Shrimp Industry.....	128
32. External Factor Evaluation (EFE) Matrix for Indonesian Shrimp Industry.....	129
33. Internal Factor Evaluation (IFE) Matrix for Indonesian Tuna Industry .....	131
34. External Factor Evaluation (EFE) Matrix for Indonesian Tuna Industry .....	132
35. Strategies priority for Indonesian Shrimp Company.....	137
36. Strategies priority for The Government of Indonesia.....	140
37. Strategies Priority for Indonesian Tuna Company .....	145
38. Strategies priority for The Government of Indonesian.....	147

Hak cipta dilindungi Undang-Undang

© Hak Cipta Milik IPB



Program Pascasarjana Manajemen dan Bisnis  
Institut Pertanian Bogor

**MB-IPB**

1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
 a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
 b. Pengutipan tidak merugikan kepentingan yang wajar IPB.

2. Dilarang mengumumkan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.

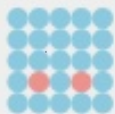


## LIST OF FIGURES

No.	Text	Page
1.	The Three Generic Strategies (Porter, 1993) .....	11
2.	Fisheries Industry Model in Indonesia (GAPPINDO, 1995) .....	15
3.	Life Cycle of Penaeid Shrimp .....	17
4.	Classification of Fresh and Frozen Shrimp (JETRO, 1994) .....	24
5.	Classification of Fresh and Frozen Tuna (PUSLITBANGKAN, 1983) .....	31
6.	Porter Driving Industry Competition (Porter, 1993) .....	38
7.	Flow chart of AHP Method .....	42
8.	Conceptual Framework of Study .....	47
9.	The General Model PIR of PT. Usaha Mina (Persero) .....	52
10.	World Shrimp Imported Countries in 1995 (Processed) .....	59
11.	Development of Shrimp Price on the Japanese Market 1994 - 1997 (INFOFISH, 1997).....	61
12.	Development of Shrimp Price on The USA Market in 1994 - 1997 (INFOFISH, 1997).....	62
13.	Development of Shrimp Price on European Market in 1994 - 1997 (INFOFISH).....	63
14.	World Tuna Export 1985 - 1995 (Seafood International, 1998) .....	64
15.	Share of Fresh Tuna Exporting Countries in 1995 (Tanabe, 1998) .....	65
16.	Share of Frozen Tuna Exporting Countries in 1995 (Tanabe, 1998) .....	66
17.	Canned Tuna Production Countries in 1995 (Seafood International, 1998) .....	67
18.	Canned Tuna Exporting Countries (Seafood International, 1998) .....	67
19.	Fresh Tuna Importing Countries in 1995 (Tanabe, 1998) .....	68
20.	Frozen Tuna Importing Countries in 1995 (Tanabe, 1998) .....	69
21.	Distribution Channel in Japanese Market (Taken from the interview with four fisheries expertises) .....	81
22.	Analytical Hierarchy Process for Internal Factor of Indonesian Shrimp Industry .....	120
23.	Analytical Hierarchy Process for External Factor of Indonesian Shrimp Industry .....	121
24.	Analytical Hierarchy Process for Internal Factor of Indonesian Tuna Industry .....	124
25.	Analytical Hierarchy Process for External Factor of Indonesian Tuna Industry .....	125
26.	Indonesian Shrimp Industry Position .....	130
27.	Indonesian Tuna Industry Position .....	133
28.	SWOT Analysis on Indonesian Shrimp Industry.....	136
29.	SWOT Analysis on Indonesian Tuna Industry .....	144

1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :  
 a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.  
 b. Pengutipan tidak merugikan kepentingan yang wajar IPB.

2. Dilarang mengemukakan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.



Program Pascasarjana Manajemen dan Bisnis  
Institut Pertanian Bogor

# MB-IPB

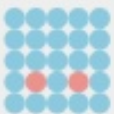
## LIST OF APPENDICES

No.	Text	Page
1.	Land and Productivity Potential for the Development of Pond Industry in Indonesia .....	161
2.	List of Shrimp Feed Company in 1997 .....	162
3.	Investment of Shrimp Pond in Indonesia .....	163
4.	The Questioner of Shrimp and Tuna Industries Competitiveness .....	165
5.	The Printout of Analytical Hierarchy Process Analysis of Indonesian Shrimp Industry .....	171
6.	The Printout of Analytical Hierarchy Process Analysis of Indonesian Tuna Industry .....	180



Hak cipta dilindungi Undang-Undang

© Hak Cipta Milik IPB



Program Pascasarjana Manajemen dan Bisnis  
Institut Pertanian Bogor

MB-IPB

1. Dilarang mengutip sebagian atau seluruh karya tulis ini tanpa mencantumkan dan menyebutkan sumber :
  - a. Pengutipan hanya untuk kepentingan pendidikan, penelitian, penulisan karya ilmiah, penyusunan laporan, penulisan kritik atau tinjauan suatu masalah.
  - b. Pengutipan tidak merugikan kepentingan yang wajar IPB.
2. Dilarang mengumumkan dan memperbanyak sebagian atau seluruhnya karya tulis ini dalam bentuk apapun tanpa izin IPB.