V. CONCLUSIONS AND SUGGESTIONS

5.1. Conclusion

Based on the results and discussion, the following conclusions can be obtained:

1. The competitiveness of cassava commodities has actually strengthened in line with its downstream level: primary cassava products (HS 071410) are only competitive in the Netherlands and Australia, intermediate cassava products (HS 110814) excel in Sri Lanka and Taipei, while downstream products (HS 190300) recorded the highest and most consistent RCA, especially in Japan. These findings suggest that downstream produces a greater and more geographically dispersed comparative advantage over raw material exports.
2. The EPD results show that all three levels of downstream will lead to unfavorable conditions in 2024: primary cassava products fall to Retreat, while intermediate cassava products and downstream cassava products are stuck in a Lost Opportunity despite the strong RCA. This indicates that the main problem is not the weak specialization of Indonesian products, but the inability of the domestic supply side to respond to global market growth in a timely manner.
3. Based on the integration of RCA and EPD, high-value-added processed products (HS 190300) have the greatest export potential to be developed, especially to Japan whose RCA increased sharply from 4.86 (2020) to 11.53 (2024), followed by Australia and Malaysia. Although the position falls to Lost Opportunity in 2024, this condition is different from the retreat on raw cassava because the

world market demand is actually growing rapidly, so the opportunity is still open as long as the supply of domestic cassava starch can be strengthened.

5.2. Suggestions

1. The government through the Ministry of Agriculture is advised to review the Minister of Agriculture Regulation No. 10 of 2022 so that cassava commodities can again receive fertilizer subsidies, considering that all levels of downstream depend on production stability at the farmer level.
2. Industry players are advised to build core-plasma partnerships with local farmer groups to secure the continuity of raw materials, with priority allocation to the high-value-added processed segment.
3. Governments and exporter associations are advised to prioritize trade diplomacy and export promotion to markets with strong and consistent RCAs, such as Japan and Australia for highly processed products.
4. Further research is suggested to expand the scope of destination countries or add domestic supply-side variables quantitatively to deepen the analysis of the causes of Lost Opportunity at the intermediate and downstream levels.