

EXPORT COMPETITIVENESS OF INDONESIAN CASSAVA COMMODITIES AND PROCESSED PRODUCTS IN THE GLOBAL MARKET

THESIS



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FACULTY OF AGRICULTURE
UNIVERSITAS PEMBANGUNAN NASIONAL "VETERAN" JAWA TIMUR
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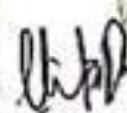
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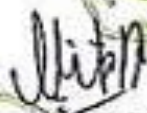
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Surabaya, July 2026
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FOREWORD

Praise and gratitude to the presence of God Almighty, for His abundant grace, gifts, and guidance so that the author can complete this thesis titled "Export Competitiveness of Indonesian Cassava Commodities and Processed Products in the Global Market". This thesis was prepared as one of the requirements that must be met by the Agribusiness study program, Faculty of Agriculture, Universitas Pembangunan Nasional "Veteran" Jawa Timur to complete obtaining a Bachelor of Agriculture degree.

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The author realizes that this thesis still has shortcomings, so constructive criticism and suggestions are highly expected for future improvement. Thus this preface is composed. Hopefully this thesis can provide benefits and be well received. For his attention and cooperation, the author would like to thank you.

Surabaya, July 2026

Author

EXPORT COMPETITIVENESS OF INDONESIAN CASSAVA COMMODITIES AND PROCESSED PRODUCTS IN THE GLOBAL MARKET

Frida Putri Purgito, Prasmita Dian Wijayati, Nuriah Yuliaty

ABSTRACT

Cassava is a strategic Indonesian agricultural commodity, yet the nation's large production capacity has not been fully converted into competitive export performance. This research analyzes the export competitiveness of Indonesian cassava across three levels of downstream processing, primary products (HS 071410), intermediate products (HS 110814), and high-value-added processed products (HS 190300), in the five main destination countries for each level during the 2020–2024 period. The analytical methods used are Revealed Comparative Advantage (RCA) to measure comparative advantage and Export Product Dynamics (EPD) to measure market-position dynamics. Results show that Indonesia's comparative advantage strengthens with the level of downstream processing: primary products are only competitive in the Netherlands and Australia, intermediate products excel in Sri Lanka and Taipei, while processed products record the highest and most consistent RCA, particularly in Japan. However, EPD analysis shows all three product levels fell into unfavorable positions in 2024, primary products into the Retreat quadrant, while intermediate and downstream products became trapped in Lost Opportunity despite strong RCA. These findings indicate that the core problem is not weak product specialization but instability in domestic raw-material supply. The research recommends strengthening the upstream supply chain and reviewing the cassava fertilizer subsidy policy.

Keywords: export competitiveness, cassava, downstream processing, RCA, EPD

ANALISIS DAYA SAING EKSPOR KOMODITAS DAN PRODUK OLAHAN SINGKONG INDONESIA DI PASAR GLOBAL

Frida Putri Purgito, Prasmita Dian Wijayati, Nuriah Yulianti

ABSTRAK

Singkong merupakan komoditas pertanian strategis Indonesia, namun besarnya kapasitas produksi nasional belum sepenuhnya terkonversi menjadi kinerja ekspor yang kompetitif. Penelitian ini bertujuan menganalisis daya saing ekspor singkong Indonesia pada tiga tingkat hilirisasi, yaitu produk primer (HS 071410), produk antara (HS 110814), dan produk olahan bernilai tambah tinggi (HS 190300), di lima negara tujuan utama pada masing-masing tingkatan selama periode 2020–2024. Metode analisis yang digunakan adalah Revealed Comparative Advantage (RCA) untuk mengukur keunggulan komparatif dan Export Product Dynamics (EPD) untuk mengukur dinamika posisi pasar. Hasil penelitian menunjukkan bahwa keunggulan komparatif Indonesia meningkat seiring tingkat hilirisasi: produk primer hanya kompetitif di Belanda dan Australia, produk antara unggul di Sri Lanka dan Taipei, sedangkan produk olahan mencatatkan RCA tertinggi dan paling konsisten, terutama di Jepang. Namun, analisis EPD menunjukkan ketiga tingkatan produk jatuh pada posisi yang kurang menguntungkan di tahun 2024, produk primer pada kuadran Retreat, sedangkan produk antara dan hilir terjebak pada Lost Opportunity meski RCA-nya kuat. Temuan ini mengindikasikan bahwa persoalan utama bukan pada lemahnya spesialisasi produk, melainkan ketidakstabilan pasokan bahan baku domestik. Penelitian merekomendasikan penguatan rantai pasok hulu dan peninjauan kembali kebijakan subsidi pupuk singkong.

Kata kunci: daya saing ekspor, singkong, hilirisasi, RCA, EPD

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