UNIVERSITAS
GADJAH MADA
Strategi Peningkatan Daya Saing Ekspor Kelapa Sawit Indonesia di Pasar Asia
Fakhrisha Nur Mahiswari, Agus Dwi Nugroho, S.P., M.Sc., Ph.D. ; Prof. Dr. Jangkung Handoyo Mulyo, M.Ec.
Universitas Gadjah Mada, 2026 | Diunduh dari http://etd.repository.ugm.ac.id/

INTISARI

Penelitian ini bertujuan untuk: (1) mengukur daya saing ekspor *crude palm oil* (CPO) Indonesia di pasar Asia, (2) mengetahui faktor-faktor yang memengaruhi daya saing ekspor CPO Indonesia di pasar Asia, dan (3) merumuskan strategi peningkatan daya saing ekspor CPO Indonesia di pasar Asia. Penelitian ini menggunakan data sekunder deret waktu (*time series*) selama 31 tahun (1993-2023) pada 12 negara tujuan ekspor di Asia yang dipilih secara *purposive sampling*, yaitu Bangladesh, China, India, Jepang, Malaysia, Myanmar, Pakistan, Korea Selatan, Arab Saudi, Singapura, Turki, dan Vietnam. Daya saing diukur menggunakan *Revealed Comparative Advantage* (RCA) dan perbedaan antarperiode diuji dengan *paired sample t-test*. Faktor-faktor yang memengaruhi daya saing dianalisis menggunakan *Error Correction Model* (ECM) yang didahului uji stasioneritas Im, Pesaran, and Shin (IPS) dan uji kointegrasi Johansen Fisher Panel, serta strategi peningkatan daya saing dirumuskan melalui analisis SWOT berdasarkan matriks IFAS dan EFAS dari hasil analisis RCA dan ECM. Hasil penelitian menunjukkan bahwa CPO Indonesia memiliki nilai RCA di atas satu pada seluruh 12 negara tujuan ekspor sepanjang periode penelitian, yang menunjukkan keunggulan komparatif yang kuat. Rata-rata RCA meningkat signifikan dari 1,60 pada periode 1993-2008 menjadi 1,91 pada periode 2009-2023 ($t = 2,3077$; $p = 0,0415$). Analisis sub-kawasan menunjukkan bahwa Asia Barat mencatat pertumbuhan RCA tertinggi, sedangkan Korea Selatan mencatat kinerja paling stabil pada 2019-2023 (rata-rata 2,42). Dalam jangka panjang, *Gross Production Index* (GPI), GDP dibagi jarak geografis (GDP_DIST), *Economic Globalization Index* (EGI), dan konsumsi bioenergi (BIOE) berpengaruh positif signifikan terhadap daya saing, sedangkan *exchange rate* (ER) berpengaruh negatif signifikan. Dalam jangka pendek, hanya *Consumer Price Index* (CPI) yang berpengaruh positif signifikan. Koefisien ECT sebesar -0,1976 signifikan pada α 1%, yang menunjukkan bahwa 19,76% ketidakseimbangan jangka pendek dikoreksi setiap periode. Berdasarkan analisis SWOT, strategi prioritas yang direkomendasikan adalah strategi SO (*Strength-Opportunity*) yang menekankan hilirisasi produk (oleokimia, oleofood, dan biodiesel), penguatan pasar tradisional seperti China dan India, perluasan penetrasi ke negara-negara Asia, dan optimalisasi keunggulan komparatif Indonesia sebagai produsen CPO terbesar dunia untuk menguasai pasar biodiesel kawasan.

Kata kunci: daya saing; Error Correction Model; ekspor CPO; Revealed Comparative Advantage; strategi SWOT

UNIVERSITAS
GADJAH MADA
Strategi Peningkatan Daya Saing Ekspor Kelapa Sawit Indonesia di Pasar Asia
Fakhrisha Nur Mahiswari, Agus Dwi Nugroho, S.P., M.Sc., Ph.D. ; Prof. Dr. Jangkung Handoyo Mulyo, M.Ec.
Universitas Gadjah Mada, 2026 | Diunduh dari http://etd.repository.ugm.ac.id/

ABSTRACT

The research aims to: (1) measure the export competitiveness of Indonesian crude palm oil (CPO) in the Asian market, (2) identify its determinants, and (3) formulate strategies to improve its competitiveness. This research was conducted using secondary time-series data for 31 years (1993-2023) covering twelve destination countries in Asia selected through purposive sampling, namely Bangladesh, China, India, Japan, Malaysia, Myanmar, Pakistan, South Korea, Saudi Arabia, Singapore, Turkey, and Vietnam. Competitiveness was measured using Revealed Comparative Advantage (RCA) and differences between periods were tested using a paired sample t-test. Factors influencing competitiveness were analyzed using the Error Correction Model (ECM) preceded by the Im, Pesaran, and Shin (IPS) stationarity test and the Johansen Panel cointegration test, and improvement strategies were formulated through SWOT analysis based on Internal Factor Analysis Summary (IFAS) and External Factor Analysis Summary (EFAS) matrices derived from RCA and ECM results. The results show that Indonesia CPO consistently recorded RCA values above one across all twelve destination countries throughout the study period, indicating a strong and consistent comparative advantage. The average RCA rose significantly from 1.60 in 1993-2008 to 1.91 in 2009-2023 ($t = 2.3077$; $p = 0.0415$). Sub-regional analysis reveals that West Asia showed the highest growth in RCA, while South Korea recorded the most stable performance in 2019-2023 (average 2.42). In the long run, Gross Production Index (GPI), GDP divided by geographic distance (GDP_DIST), Economic Globalization Index (EGI), and bioenergy consumption (BIOE) have a significant positive effect on competitiveness, while exchange rate (ER) has a significant negative effect. In the short run, only Consumer Price Index (CPI) shows a significant positive effect. The ECT coefficient of -0.1976 is significant at the 1% level, indicating that 19.76% of short-run disequilibrium is corrected each period toward long-run equilibrium. Based on SWOT analysis, the recommended priority strategy is SO (Strength-Opportunity), which emphasises downstream product development (oleochemical, oleofood, and biodiesel), strengthening of traditional markets such as China and India, market penetration into high-growth Asian countries, and optimisation of Indonesia's comparative advantage as the world's largest CPO producer to dominate the regional biodiesel market.

Keywords: competitiveness; CPO export; Error Correction Model; Revealed Comparative Advantage; SWOT strategy