

Intisari

Berdasarkan data BP Statistical Review (2018), selama kurun waktu 2011-2017, Indonesia masuk 5 (lima) besar produsen batubara di dunia. Selain itu, batubara merupakan komoditas ekspor utama Indonesia dimana sebanyak 80 persen batubara Indonesia menjadi komoditas ekspor. Hal ini mengakibatkan terjadinya persaingan pasar signifikan antar pelaku industri batu bara Indonesia. Ditandai dengan pangsa pasar dan harga batubara acuan yang tinggi, persaingan antar pelaku industri batubara cukup tinggi untuk meraih profitabilitas terbesar. Fenomena ini mendorong penulis untuk melakukan studi tentang analisis struktur, perilaku, dan kinerja industri batubara di Indonesia. Untuk melengkapi studi tersebut, analisis Lima Kekuatan Industri dari Michael Porter dilakukan secara kualitatif. Dengan mengacu data OSIRIS 2018, data 18 perusahaan dipilih untuk menjadi obyek studi ini sebagai pelaku industri batubara Indonesia untuk periode 2011-2017. Hasil studi menunjukkan bahwa pangsa pasar tidak mempengaruhi profitabilitas, sedangkan total aset dan pertumbuhan pendapatan mempengaruhi profitabilitas. Struktur industri batubara berdasarkan perhitungan CR_6 adalah oligopoli ketat.

Kata Kunci: struktur, perilaku, kinerja, industri batubara

Abstract

Based on BP Statistical Review (2018) data, during the period of 2011-2017, Indonesia was the 5th (fifth) major coal producers in the world. In addition, coal is Indonesia's main export commodity, as much as 80 percent of Indonesian coal is an export commodity. This has resulted in significant market competition among Indonesian coal industry players. Marked by market share and high reference coal prices, rivalry between coal industry players is high enough to achieve the greatest profitability. This phenomenon encourages the writer to analyze of the structure, behavior, and performance of the coal industry in Indonesia. To complete the study, the Five Forces Model from Michael Porter was carried out qualitatively. By referring to OSIRIS 2018 data, 18 companies were selected to be the object of this study as Indonesian coal industry players for the period 2011-2017. The results indicate that market share does not affect profitability, while total asset and income growth affect profitability. The structure of the coal industry based on the calculation of CR_6 is strictly oligopoly.

Keywords: structure, behavior, performance, coal industry