



INTISARI

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Tuna merupakan komoditi ekspor andalan utama dari sektor perikanan dengan proporsi rata-rata 15,31% dari total produksi. Tuna Indonesia diekspor dalam bentuk segar, beku dan olahan dengan pasar tradisional Jepang dan USA. Melalui Renstra 2010-2014, ditetapkan salah satu pasar prospektif adalah Korea Selatan. Perubahan tatanan global memberikan peluang dan meningkatkan persaingan, sehingga kemampuan daya saing produk menjadi kunci utama.

Penelitian ini bertujuan untuk mengetahui daya saing, posisi daya saing, dan mengidentifikasi faktor-faktor yang mempengaruhi ekspor, harga ekspor, daya saing tuna Indonesia di pasar internasional, Jepang, USA dan Korea Selatan. Penelitian menggunakan data runtut waktu ekspor impor tuna dunia tahun 1982-2012 dengan sumber utama UNComtrade dan Kementerian Kelautan dan Perikanan Indonesia. Metode analisis menggunakan analisis simultan, pangsa pasar, RCA dan RSCA, Indeks Spesialis Perdagangan (ISP), *Constant Market Share Analysis* (CMSA) dan *Export Product Dynamics* (EPD).

Hasil penelitian menunjukkan bahwa : (1) Faktor yang mempengaruhi ekspor tuna Indonesia : (a) di pasar internasional : produksi tuna Indonesia dan jumlah ekspor tuna Indonesia tahun sebelumnya; (b) pasar tuna segar Jepang : harga ekspor tuna segar Indonesia ke Jepang dan jumlah ekspor tuna segar Indonesia ke Jepang tahun sebelumnya; pasar USA : harga ekspor tuna segar Indonesia ke AS, nilai tukar rupiah terhadap dolar US, produksi tuna segar Indonesia, dan jumlah ekspor tuna segar Indonesia ke AS tahun sebelumnya; (c) pasar tuna beku Jepang : nilai tukar rupiah terhadap Yen, produksi tuna beku Indonesia dan penerapan persyaratan mutu produk; pasar USA : jumlah ekspor tuna beku Indonesia ke USA tahun sebelumnya; pasar Korea : nilai tukar rupiah terhadap won; (d) pasar tuna olahan Jepang : produksi tuna olahan Indonesia, jumlah ekspor tuna olahan Indonesia ke Jepang tahun lalu, dan penerapan persyaratan mutu produk; pasar USA : harga ekspor tuna olahan Indonesia ke Amerika Serikat, nilai tukar rupiah terhadap dolar Amerika, produksi tuna olahan Indonesia, serta jumlah ekspor tuna olahan Indonesia ke USA tahun lalu; pasar Korea : penerapan persyaratan mutu produk. (2) Faktor yang mempengaruhi harga ekspor : (a) tuna segar di Jepang : harga ekspor tuna segar tahun sebelumnya; pasar USA : harga ekspor tuna beku Indonesia ke AS dan harga ekspor tuna segar Indonesia ke AS tahun sebelumnya; (b) tuna beku di Jepang : harga ekspor tuna beku tahun sebelumnya; pasar USA : harga ekspor tuna segar Indonesia ke AS dan perubahan volume impor tuna beku AS; (c) tuna olahan di Jepang : harga ekspor tuna olahan tahun sebelumnya, nilai tukar rupiah terhadap Yen, dan perubahan jumlah impor tuna olahan Jepang; pasar USA : perubahan volume impor tuna olahan AS; pasar Korea : harga ekspor tuna segar Indonesia ke Korea Selatan, (3) Tuna Indonesia di pasar dunia berdaya saing dan daya saing tuna segar lebih tinggi dibandingkan tuna beku dan olahan, (4) Di pasar Jepang, USA, dan Korea Selatan Indonesia mempunyai daya saing tinggi, dan dalam tingkat pertumbuhan ke kematangan, (5) Daya saing tuna Indonesia lebih disebabkan oleh daya saing spesifik.

Kata kunci : daya saing, tuna Indonesia



ABSTRACT

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Tuna is main export commodity of the fisheries sector with the average proportion of 15,31% of the total production. Indonesia tunas exported in the form of fresh, frozen, and preserved tunas with Japan and United States (US) as traditional markets. Through the Strategic Plan 2010-2014, Rep of Korea has been set to one of the prospective market. The changes in the global order not only providing opportunities but on the other hand increasing the competition, so the competitiveness of products becoming the key factor to win the competition.

The research aims to know competitiveness, competitive position, and determinant factors of Indonesia tuna competitiveness in word, Japanese, US, and Rep of Korea market. The research use the times series data of word's import export tunas in 1982-2014 with the main source UNComtrade and Ministri of Maritime Affairs and Fisheries of Indonesia. It is using analysis of simultaneous equations, market share (MS), Revealed Comparative Advantage (RCA) and Revealed Symmetric Comparative Advantage (RSCA), Trade Specialist Ratio (TSR), and Constant Market Share Analysis (CMSA).

The result showed that : (1) factors affecting the Indonesian tuna exports: (a) the world market : Indonesian tuna production and the amount of tuna export different time; (b) Fresh tuna market in Japan : price of fresh tuna exports year-1 and the amount of fresh tuna export different time; US market : price of fresh tuna export year-t, exchange rate, production of fresh tuna from Indonesia and the amount of tuna export different time; (c) frozen tuna market in Japan : exchange rate, production of frozen tuna Indonesia and implementation of product quality requirements ; US market : the amount of frozen tuna export different time; Korean market : exchange rate; (d) preserved tuna market in Japan : production of preserved tuna from Indonesia, the amount of preserved tuna export different time, and implementation of product quality requirements ; US market : price of preserved tuna exports from Indonesia to US, exchange rate, production of preserved tuna Indonesia and the amount of preserved tuna export different time; Korean market : implementation of product quality requirements, (2) Factors affecting the export price : (a) fresh tuna market in Japan : price of fresh tuna exports different time, US market : price of frozen tuna from Indonesia to US and price of fresh tuna from Indonesia to US different time, (b) frozen tuna market in Japan : price of frozen tuna different time, US market : price of fresh tuna from Indonesia to US and changes in the volume of frozen tuna imported from US, (c) preserved tuna in Japan : price of preserved tuna different time, exchange rate, and changes in the volume of preserved tuna imported from Japan, US market : changes in the volume of preserved tuna imported from US, Korean market : price of fresh tuna from Indonesia to Korea, (3) Indonesia Tunas has a highly competitiveness in world market and the competitiveness of fresh tunas is higher than frozen and preserved tunas, (4) Indonesian tunas have high competitiveness In the Japanese market, the USA, and Rep. of Korea, with the rate of growth go to maturity, and (5) competitiveness of Indonesian tuna is caused by the effect of specific competitiveness.

Keyword : competitiveness, tuna Indonesia