EXPORT PERFORMANCE ANALYSIS OF BLACK TEA (HS 090240) INDONESIA IN THE UNITED STATES MARKET

Maharani Sri Wedari[1], Ignatia Martha Hendrati[2]

[1,2]Development Economics Study Program, Universitas Pembangunan Nasional Veteran,
Email: *19011010115@student.upnjatim.ac.id*   Email: *ignatia_martha@yahoo.com*

ABSTRACT

Tea stands as the second most consumed beverage worldwide, following water. Indonesia holds a prominent position among the largest tea-producing nations globally, with a primary emphasis on black tea production. The American market serves as a pivotal export destination for black tea, holding strategic significance in the trading dynamics of this commodity. The prevalence of black tea within the US market delineates discernible consumption patterns and interest, highlighting the United States' pivotal role in the global acceptance and dissemination of black tea commodities. The research methodology encompasses the utilization of Revealed Comparative Advantage (RCA), Revealed Symmetric Comparative Advantage (RSCA), and Constant Market Share (CMS). This study is designed to assess Indonesia's competitive standing and advantage in exporting black tea to the United States market within a specified timeframe. The analysis outcomes reveal Indonesia's comparative advantage within this sector and illustrate fluctuations in its competitive position vis-à-vis competing nations in the US market.

Keywords: Tea Consumption, Indonesia Tea Production, Black Tea Export to the United States

INTRODUCTION

International trade, an economic activity centered on the voluntary exchange of goods and services among nations, is a pivotal aspect of global commerce. Within Indonesia, an example of this trade involves the exportation of tea from the plantation sector. Tea, originally introduced from China, holds a prominent position as a commodity globally, ranking second in consumption after water, with a staggering consumption rate of approximately three billion cups per day (Cakra & Munandar, 2020).

The increase in global demand for tea throughout the world is caused by a number of factors, including growing demand from developing countries. This growth is also reflected in Indonesia's domestic market demand over the past few years, especially from the beverage industry sector, where ready-to-drink packaged tea drinks have become very popular among Indonesia's younger generation. Fluctuations in global tea prices which tend to increase from year to year create incentives for the redevelopment of the tea industry at the national level. Even though Indonesia has a market share of 2% in total global tea production, cooperation and synergistic efforts are needed to increase Indonesian tea production and competitiveness. During the Covid-19 pandemic, this shift in consumer lifestyles which emphasizes customer value has increased demand for the tea market at the global level, with a projected increase in demand until 2027 (Nursodik et al., 2021)

Tea as a commodity has variations consisting of four main types: green tea in bulk form, packaged green tea, black tea in bulk form, and packaged black tea. Among these variants, packaged black tea is Indonesia's main advantage in this market. Tea production in Indonesia is largely dominated by black tea, which accounts for 84.95% of total tea production in this country. The majority of tea production is exported abroad, while a small portion is sold in the domestic market. Indonesian tea exports cover five continents, namely Asia, Africa, Australia, America and Europe. In 2019, the top four countries that were the main destinations for Indonesian tea exports included Malaysia, Russia, Pakistan and the United States (Ministry of Agriculture Directorate General of Plantations, 2022).

Indonesia, being one of the primary tea-producing nations globally, consistently grapples with challenges concerning its tea exports to key markets. The intensifying competition within the global market urges Indonesia to continuously innovate to uphold its competitiveness and augment its market share. The volatility observed in Indonesian tea exports is believed to stem from several factors, encompassing the destination country's Gross Domestic Product (GDP), the exchange rate of the Rupiah against the US Dollar, the international tea market prices, and the per capita tea consumption in the export destination. Changes in these variables are anticipated to wield a substantial impact on Indonesia's economy, particularly in terms of their influence on the nation's foreign exchange earnings (Puspasari et al., 2017)

International trade encompasses the exchange of goods and services between nations, delineating economic interactions via two crucial elements: exports and imports. These facets of exportation and importation serve as foundational pillars, exerting significant influence on a country's economic dealings. A surplus in a nation's trade balance, occurring when the value of exports exceeds that of imports, signifies the potential for substantial economic growth and development (Alabdullah & Kanaan-Jebna, 2023). Conversely, when imports outweigh exports, the country might face limited economic growth, largely reliant on external sources (Meutia et al., 2022). The foundation of international trade stems from at least two primary motives: disparities among nations and the aspiration of countries to attain economic efficiency in their production processes. Countries typically aim to optimize the production of specific commodities until reaching the desired economic scale, without necessitating the production of all types of goods within their borders. Consequently,

nations tend to specialize, seeking profitability through international trade.

The Theory of Comparative Advantage states that differences in the way factors of production, such as labor, operate can cause variations in productivity and efficiency. This variation then causes the prices of similar goods to differ between the two countries (Setiawati, 2021).The theory highlights the importance of specialization in improving the quality of a product, so that countries are advised to focus on producing goods that take advantage of their comparative advantages, sell them to other countries, and at the same time, buy products that they do not have comparative advantages from other countries (Ramadhani et al., 2021).

Tea production in Indonesia is predominantly characterized by the black tea variety, constituting a staggering 84.95% of the country's overall tea production. The bulk of this tea production finds its way to international markets, while a smaller fraction is marketed domestically. Indonesian tea exports have made inroads across five continents, spanning Asia, Africa, Australia, the Americas, and Europe. In the year 2019, the primary importers of black tea (HS 090240) from Indonesia were identified as Russia, Malaysia, the United States, Pakistan, and China (Ministry of Agriculture, Directorate General of Plantations, 2022).

The aim of this study is to evaluate Indonesia's competitive position and advantage in the exportation of black tea to the United States market, with a specific focus on a defined timeframe. The findings of this study hold several implications for various stakeholders, including policymakers, industry players, and researchers. Firstly, an in-depth analysis of Indonesia's competitive advantage in the US black tea market provides policymakers with valuable information to formulate trade policies that can enhance the country's position in the global market. For industry players, the insights derived from the study can guide marketing strategies, production planning, and export initiatives, enabling them to capitalize on Indonesia's strengths and address potential challenges. Additionally, the research contributes to the academic understanding of international trade dynamics, specifically in the context of the tea industry, fostering further research and knowledge development in this field.

RESEARCH METHODS

This study adopts a quantitative approach to assess the export competitiveness of Indonesian Black Tea (HS 090240) in the United States market, comparing it with Argentina, China, India, Malawi, Germany, Taipei, Vietnam, and Zimbabwe. The research focuses on the exportation of black tea categorized under HS code 090240. The data utilized is secondary and comprises a time series spanning from 2012 to 2021, sourced from official institutions such as BPS, Trademap (ITC), and UN Comtrade.

The data undergoes descriptive quantitative processing and analysis. The quantitative analysis employs Revealed Comparative Advantage (RCA) and Constant Market Share (CMS) methodologies. The resulting calculations derived from the RCA and CMS analyses will be elucidated in accordance with the theories underpinning these analytical tools (Zuhdi et al., 2022).

Revealed Comparative Advantage (RCA)
The concept of Revealed Comparative Advantage (RCA) presents a dynamic methodology adept at assessing the competitiveness level within a specific sector or product. Widely utilized in diverse studies, the RCA method is instrumental in scrutinizing alterations in comparative advantage across different sectors, notably within the agricultural domain. RCA operates on the principle of contrasting a nation's product market share on a global scale with its export share relative to the total world exports (Zuhdi, 2021). Mathematically, the calculation of RCA involves employing the following formula:

$$RCA = \frac{Xij \, / \, Xit}{Wj \, / \, Wt}$$

With description:
Xij   : Export value of commodity i from country j
Xit   : Total export value from country j
Wj   : World export value of commodities i
Wt   : Total value of world exports

When the RCA index value for a specific commodity surpasses 1 (>1), it signifies that the country possesses a superior comparative advantage compared to the global average for that particular commodity. Conversely, if the RCA index value falls below 1 (<1), it suggests that the country's comparative advantage is diminished, standing below the world average for the same commodity (Setiyaningsih, 2023). Because the RCA index is not on both sides of equality, namely the number 1, to make it symmetrical, a symmetric RCA index was created which is known as Revealed Symmetric Comparative Advantage (RSCA) (Bruno, 2019) with the formula:

$$RSCA = \frac{RCA - 1}{RCA + 1}$$

The RSCA index has a value range from 1 to -1, where an RSCA value greater than 0 indicates that a country has a comparative advantage. Conversely, an RSCA value of less than 0 indicates that the country does not have a comparative advantage in the context of the commodity being studied

Constant Market Share (CMS)
Constant Market Share (CMS), elucidated by Cakra & Munandar (2020), stands as a method employed to assess a country's export competitiveness or competitive advantage in the global market relative to its competitor nations. The CMS framework illustrates a country's export performance, impacted by the competitiveness of its products within the global marketplace.

Nations capable of enhancing the competitiveness of their exported goods hold substantial potential to significantly enlarge their market share. In the realm of competition among countries exporting black tea to the United States market, three critical factors demand attention in bolstering a country's export performance: the effects of commodity composition,

market distribution, and competitiveness. Competitiveness, often employed as a metric to evaluate a country's accomplishments in international trade, stands as a crucial aspect that warrants careful consideration (Fatimah et al., 2021).

Standard growth $= \frac{Et - E(t-1)}{E(t-1_-)} = r$

Commodity composition effects $= \frac{\sum i\,(ri-r)\,Ei\,(t-1)}{E\,(t-1)}$

Market distribution effects $= \frac{\sum i \sum j\,(rij-ri)\,Eij\,(t-1)}{E\,(t-1)}$

Competitiveness effect $= \frac{\sum i \sum j\,Eij\,(t)-\,Eij\,(t-1)-\,Eij\,(t-1)}{E\,(t-1)}$

Information

$r = \frac{Wt - W(t-1)}{W(t-1)}$

$ri = \frac{Wi(t) - Wi(t-1)}{W(t-1)i}$

$rij = \frac{Wij(t) - Wij(t-1)}{Wij(t-1)i}$

Et = Total export value of country a in year t

E(t-1) = Total export value of country a in the previous year

Hey = Value of exports (commodities) of country a

Ei (t-1) = Export value of commodity I in country a in the previous year

Eij = Value of exports (commodities) from country a to country j

Eij (t-1)= Value of exports (commodities) from country a to country j in the previous year

r = total value of standard export growth (world)

ri = standard (world) export (commodity) growth value

rij = growth value of exports (commodities) to country j

W(t) = Total value of exports at standard (world) year I

W(t-1) = total value of standard exports (world) in the previous year

Wi(t) = total value of standard (world) exports of commodity i in year t

Wi(t-1) = total value of standard (world) exports of commodity i in the previous year

Wij (t) = total value of standard (world) exports of commodity I to country j in year t

Wij (t-1) = total value of standard (world) exports of commodity I to country j in the previous year

a = country of origin (Indonesia)

j = destination country (United States)

In the Constant Market Share (CMS) analysis, there are four parameters applied:

Table 1. Four Parameters

Standard Export Growth	Commodity Composition Effects	Market Distribution Effects	Competitiveness Effects
This parameter signifies the overall increase in commodity exports globally to a specific nation. It gauges the export performance of specific commodities from one country to another. When the growth of commodities in a country surpasses the global standard for export growth, it signifies a stronger export performance. Conversely. if it falls below the global standard, it indicates a weaker performance.	Conveys the level of export concentration on superior commodities that are growing rapidly from a country. If this parameter is positive, it indicates that the composition of the commodity is sufficient to meet market demand and requirements in the destination country. so that the market is interested in it: vice versa for negative values.	Describes export performance by analyzing profits or losses in a country's exports caused by changes in export markets. If this parameter is positive, it shows the country's ability to utilize its role in the demand growth market: vice versa for negative values.	Refers to indications of increases or decreases in the market share of commodity exports relative to global standards, taking into account changes in the value of commodity composition and market distribution. If this parameter is positive, it indicates the strength of a country compared to other competing countries: vice versa for negative values.

RESULTS AND DISCUSSION

Revealed Symmetric Comparative Advantage (RSCA)
The results of calculations using RSCA analysis are useful for comparing the competitiveness of a commodity with other countries. RSCA is a refinement of the analysis tool, namely Revealed Comparative Advantage (RCA) where the RCA index is not the same as the two neutral sides, namely 1. The RSCA index ranges from -1 to 1.

Table 2. RSCA value of black tea exporting countries (hs 090240)
to the United States market 2012-2021

RSCA VALUE

	INA	ARG	IND	CHN	MAL	GER	TAI	VIE	KEN	ZIM
2012	0.43	0.98	0.66	-0.56	1.00	0.01	-0.68	0.79	0.99	1.00
2013	0.45	0.98	0.69	-0.59	1.00	-0.23	-0.66	0.84	0.99	1.00
2014	0.39	0.98	0.67	-0.61	0.99	-0.34	-0.64	0.85	0.99	1.00
2015	0.22	0.98	0.62	-0.65	0.99	-0.42	-0.67	0.77	0.99	1.00
2016	0.26	0.97	0.60	-0.63	0.99	-0.26	-0.62	0.78	0.99	1.00
2017	0.09	0.97	0.52	-0.71	1.00	-0.25	-0.72	0.71	0.99	1.00
2018	-0.02	0.97	0.49	-0.66	1.00	-0.33	-0.70	0.73	0.97	1.00
2019	0.07	0.97	0.42	-0.66	1.00	-0.29	-0.67	0.74	0.96	1.00
2020	0.09	0.97	0.45	-0.79	1.00	-0.29	-0.75	0.74	0.96	1.00
2021	0.03	0.97	0.39	-0.73	1.00	-0.26	-0.70	0.85	0.97	1.00
MEANS	0.20	0.97	0.55	-0.66	1.00	-0.27	-0.68	0.78	0.98	1.00

It can be seen from the table 2, that the RSCA value of almost all countries is above 0 every year except Germany, China and Taipei. This indicates that Zimbabwe, Malawi, Kenya, Argentina, Vietnam, India and Indonesia have a high comparative advantage for black tea commodities (HS 090240) and each year have competitiveness in exporting HS 090240 black tea to the United States. It is known that China and Taipei's RSCA was worth less than 0 during the entire research period, while Germany had an RSCA value of 0.1 in 2012 but in the following year until the end of the research period Germany had an RSCA value of less than 0. This Constant Market Share (CMS) Standard Growth

indicates that Germany, China and Taipei did not has a comparative advantage and low competitiveness to export HS 090240 black tea to the United States.

Indonesia is in seventh place with an average RSCA value of 0.2 after Zimbabwe, Malawi, Kenya, Argentina, Vietnam and India. Even though it has a relatively low RSCA value compared to the six competing countries, Indonesia still has high competitiveness because during the research period most of Indonesia's RSCA values were more than 0.

Table 3. Export growth value of black tea exporting countries (hs 090240)
to the United States market in 2012 – 2021

STATE STANDARD GROWTH VALUE

	INA	ARG	IND	CHN	MAL	GER	TAI	VIE	KEN	ZIM
2013	-0.04	-0.05	0.16	0.078	-0.08	0.03	0.01	-0.04	-0.05	-0.01
2014	-0.04	-0.10	-0.06	0.060	0.21	0.03	0.03	-0.05	0.05	-0.05
2015	-0.15	-0.17	-0.17	-0.026	-0.23	-0.12	-0.11	-0.10	-0.03	-0.30
2016	-0.04	0.02	-0.01	-0.071	-0.06	0.01	0.00	-0.17	-0.04	0.24
2017	0.17	0.02	0.13	0.072	-0.14	0.08	0.13	0.02	0.01	0.04
2018	0.07	0.05	0.10	0.098	-0.01	0.08	0.06	0.02	0.05	0.16
2019	-0.07	0.05	0.00	0.002	0.04	-0.04	-0.01	0.05	-0.04	0.06
2020	-0.03	-0.16	-0.15	0.036	-0.14	-0.07	0.05	0.05	0.03	0.03
2021	0.42	0.42	0.43	0.299	0.30	0.18	0.29	-0.16	0.12	0.37
MEANS	0.03	0.01	0.05	0.06	-0.01	0.02	0.05	-0.04	0.01	0.06

The results of standard calculations for the main exporter of black tea (HS 090240) to the United States market indicate that Indonesia's black tea export performance is ranked fifth among 10 other competing countries. Indonesia is below China, Zimbabwe, Taipei and India.

In table 3, it is known that the average growth in exports of black tea commodities from China, Zimbabwe, Taipei, India, Indonesia, Germany, Kenya and Argentina is above the average value of

growth in exports of world black tea commodities to the United States. Meanwhile, the average growth standard for exports of black tea commodities from Malawi and Vietnam is still below the average growth rate for exports of black tea commodities in the world, so it can be said that the increase in the value of exports of black tea commodities from Malawi and Vietnam is not higher and is not superior to the export value. world black tea commodity to the United States market.

Commodity Composition Effects

Table 4. Commodity Composition Effect value of black tea exporting countries (hs 090240)
to the United States market in 2012 – 2021

VALUE OF COMMODITY COMPOSITION EFFECTS

	INA	ARG	IND	CHN	MAL	GER	TAI	VIE	KEN	ZIM
2013	-0.0006	-0.0012	-0.0021	-0.00008	-0.0544	-0.00005	-0.00003	-0.0013	-0.1937	-0.0038
2014	-0.0006	-0.0014	-0.0021	-0.00008	-0.0704	-0.00005	-0.00003	-0.0014	-0.2062	-0.0049
2015	-0.0005	-0.0016	-0.0018	-0.00007	-0.0534	-0.00005	-0.00004	-0.0012	-0.1724	-0.0045
2016	-0.0005	-0.0016	-0.0022	-0.00008	-0.0542	-0.00005	-0.00004	-0.0013	-0.2084	-0.0065
2017	-0.0004	-0.0016	-0.0022	-0.00010	-0.0647	-0.00005	-0.00008	-0.0017	-0.2122	-0.0047
2018	-0.0004	-0.0015	-0.0022	-0.00010	-0.0797	-0.00005	-0.00010	-0.0019	-0.2445	-0.0059
2019	-0.0003	-0.0014	-0.0021	-0.00011	-0.0991	-0.00004	-0.00011	-0.0015	-0.2241	-0.0057
2020	-0.0003	-0.0013	-0.0022	-0.00015	-0.0874	-0.00005	-0.00009	-0.0015	-0.1883	-0.0048
2021	-0.0003	-0.0013	-0.0021	-0.00013	-0.0947	-0.00005	-0.00008	-0.0013	-0.1990	-0.0036
MEANS	-0.0004	-0.0014	-0.0021	-0.00010	-0.0731	-0.00005	-0.00007	-0.0015	-0.2054	-0.0049

It can be seen from the table 4, Average Commodity Composition Effect of all exporting countries does not yet have a tea commodity composition that is sufficient to meet market demand and meet market requirements in the United States.

The results of measuring the effect of the commodity composition of the main exporter of black tea (HS 090240) to the United States market indicate that Indonesia is ranked fourth in terms of meeting market demand and meeting market requirements in the United States, below Germany, Taipei and China. Argentina is in fifth place, followed by Vietnam, India, Zimbabwe, Malawi and Kenya.

Market Distribution Effects

Table 5. Market Distribution Effect value of black tea exporting countries (hs 090240)
to the United States market 2012 – 2021

VALUE OF MARKET DISTRIBUTION EFFECTS

	INA	ARG	IND	CHN	MAL	GER	TAI	VIE	KEN	ZIM
2013	-0.00004	-0.0009	-0.00012	-0.000010	-0.0040	-0.000017	-0.000004	-0.00009	-0.0014	-0.0006
2014	-0.00004	-0.0011	-0.00013	-0.000009	-0.0078	-0.000011	-0.000005	-0.00011	-0.0025	-0.0004
2015	-0.00004	-0.0012	-0.00012	-0.000008	-0.0019	-0.000008	-0.000005	-0.00012	-0.0028	-0.0006
2016	-0.00003	-0.0013	-0.00014	-0.000008	-0.0018	-0.000008	-0.000005	-0.00009	-0.0030	-0.0007
2017	-0.00004	-0.0012	-0.00013	-0.000009	-0.0042	-0.000011	-0.000006	-0.00010	-0.0040	-0.0007
2018	-0.00002	-0.0012	-0.00011	-0.000008	-0.0057	-0.000012	-0.000004	-0.00010	-0.0042	-0.0009
2019	-0.00002	-0.0010	-0.00009	-0.000008	-0.0064	-0.000009	-0.000004	-0.00010	-0.0011	-0.0012
2020	-0.00002	-0.0009	-0.00008	-0.000007	-0.0054	-0.000010	-0.000006	-0.00009	-0.0008	-0.0011
2021	-0.00002	-0.0009	-0.00010	-0.000004	-0.0061	-0.000010	-0.000005	-0.00009	-0.0009	-0.0008
MEAN	-0.00003	-0.0011	-0.00011	-0.000008	-0.0048	-0.000011	-0.000005	-0.00010	-0.0023	-0.0008

From table 5, it can be seen that the average value of the market distribution effect from HS 090240 black tea exporting countries to the United States is negative. Indonesia is in fourth place after Taipei, China and Germany, followed by Vietnam, India, Zimbabwe, Argentina, Kenya and Malawi. From the value of the market distribution effect, it can be seen that the commodity composition in the ten countries that export black tea to the United States is not sufficient to meet market demand and requirements in the United States, which has resulted in a lack of interest in black tea products.

Competitiveness Effects

Table 6. Value of the Competitiveness Effect of black tea exporting countries (hs 090240)
to the United States market in 2012 – 2021

VALUE OF COMPETITIVENESS EFFECTS

	INA	ARG	IND	CHN	MAL	GER	TAI	VIE	KEN	ZIM
2013	0.000005	0.000103	0.000034	-0.0000004	0.0030	-0.0000063	0.0000001	0.000020	0.00097	-0.00022
2014	-0.000004	-0.000065	-0.000019	0.0000001	-0.0057	-0.0000027	0.0000002	-0.000004	0.00042	0.00008
2015	-0.000009	0.000006	-0.000011	0.0000003	-0.0003	-0.0000001	0.0000003	-0.000027	0.00009	-0.00001
2016	0.000004	-0.000045	-0.000004	0.0000005	0.0022	0.0000035	0.0000010	-0.000005	0.00080	0.00024
2017	-0.000005	0.000028	-0.000008	-0.0000003	0.0007	0.0000022	-0.0000009	0.000005	0.00026	0.00024
2018	-0.000008	-0.000016	-0.000012	0.0000011	0.0009	-0.0000021	0.0000004	0.000001	-0.00299	0.00050
2019	0.000006	-0.000097	-0.000010	0.0000004	-0.0006	0.0000010	0.0000013	0.000003	-0.00032	-0.00003
2020	0.000000	-0.000003	0.000002	-0.0000033	0.0006	0.0000009	0.0000001	0.000013	0.00005	-0.00006
2021	0.000001	-0.000052	0.000004	0.0000018	0.0047	-0.0000005	0.0000009	0.000009	0.00001	-0.00014
MEAN	-0.000001	-0.000016	-0.000003	0.00000002	0.0006	-0.0000005	0.0000004	0.000002	-0.00007	0.00006

It can be seen from the table 6, that the average competitiveness effect value for the countries of Malawi, Zimbabwe, Vietnam, Taipei and China is positive. This indicates that there has been an increase in income from the black tea commodity from the five black tea exporting countries. On the other hand, the average competitiveness effect value for Germany, Indonesia, India, Argentina and Kenya is negative, indicating that these countries have a weaker level of competitiveness than other exporting countries.

Results of measuring the competitiveness effects of major exporting countries black tea (HS 090240) to the United States market indicates that Indonesia is ranked seventh in terms of competitiveness, below Malawi, Zimbabwe, Vietnam, Taipei, China and Germany, followed by India, Argentina and Kenya.

CONCLUSION

Based on research on "Analysis of the export performance of Indonesian HS (090240) black tea in the United States market" during 2012 to 2021 compared with competing countries, it can be concluded that Indonesian Black Tea (HS 090240) has quite strong competitiveness, as evidenced by the RCA value > 1. This indicates that Indonesian black tea has a large market share in the world market. Indonesia's RSCA value throughout 2012-2021 which is > 0 also proves that Indonesian black tea is able to compete in the world market because it has a comparative advantage and is specialized in tea products, meaning that Indonesia can produce tea at a lower cost compared to other competing countries.

The CMS analysis carried out in this research proves that the competitiveness effect has the strongest influence on the growth of Indonesian black tea exports. Indonesia has experienced growth in black tea commodity exports to the United States market, but it is still below world export growth to the United States. Indonesia has a negative commodity composition effect value. This indicates that Indonesia has not met market demand in the United States, so what happens is that black tea from these eight countries has low demand in the market. Indonesia also has a negative value on market distribution effects which causes Indonesia to have relatively weak competitiveness in the United States compared to competing countries. Then regarding the competitiveness effect, Indonesia has a negative value and proves that Indonesia has a weaker level of competitiveness compared to other exporting countries

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