Opportunities and Challenges for Exporting Indonesian Processed Foods and Agricultural Products to China

Arie Kusuma Paksi[1,*], *Andini* Hayu Agus Putri[1], *Laras* Prasasti[1], *RR Zahroh* Hayati Azizah[1]

[1]Department of International Relations, Universitas Muhammadiyah Yogyakarta, Indonesia

Abstract. The trade relationship between Indonesia and China has evolved significantly, presenting substantial opportunities for Indonesian agricultural and processed food exports. This research explores the potential and challenges of exporting key products such as green beans, coffee, and porang to China. Leveraging Indonesia's diverse agricultural base and the growing demand in China, this study analyzes production capabilities, market trends, and consumer preferences. It identifies significant barriers, including stringent regulatory requirements and logistical challenges, and proposes strategies to overcome them. Key recommendations include enhancing government support through policy measures and trade agreements and investing in capacity building initiatives such as training programs and technological advancements. By forming strategic partnerships and improving product quality, Indonesian exporters can enhance their competitiveness in the Chinese market. This research aims to provide actionable insights and strategies to bolster Indonesia's agricultural exports, fostering economic growth and strengthening trade relations between Indonesia and China.

1 Introduction

Indonesia's agricultural and processed food sectors play a pivotal role in the country's economy, contributing significantly to employment, income generation, and food security. As an archipelago with diverse agro-ecological zones, Indonesia boasts a wide variety of agricultural products, ranging from staple crops like rice and maize to high-value commodities such as coffee, cocoa, and palm oil. The country's processed food industry is also expanding, driven by both domestic consumption and export opportunities. In this context, the export market is crucial for Indonesia's economic growth, offering avenues for increased revenue, market diversification, and global competitiveness.

The agricultural sector in Indonesia employs around 30% of the workforce and accounts for approximately 14% of the Gross Domestic Product (GDP) [1]. Key agricultural products include palm oil, rubber, cocoa, coffee, and tropical fruits. Indonesia is the world's largest producer of palm oil and a significant exporter of coffee and rubber. The processed food sector, encompassing a range of products from canned goods to ready-to-eat meals,

* Coresponding author: ariekusumapaksi@umy.ac.id

has been growing at a robust pace, driven by rising incomes, urbanization, and changing consumer preferences [2].

The importance of export markets to Indonesia's economic growth cannot be overstated. Exporting agricultural and processed food products not only brings in much-needed foreign exchange but also helps stabilize domestic prices by offloading surplus production. It encourages the adoption of better farming practices and processing technologies, thus enhancing productivity and quality. Furthermore, Improving small and medium-sized enterprises (SMEs) in the agriculture sector's access to foreign markets can be a key tactic for advancing rural development, lowering poverty, and supporting sustainable economic growth [3].

China, with its vast and rapidly growing market, presents a significant opportunity for Indonesian exporters. The country's burgeoning middle class, urbanization, and increasing disposable incomes have led to a surge in demand for diverse and high-quality food products. China's food market is one of the largest in the world, with a value projected to reach over USD 1.5 trillion by 2025 [4]. This growth is driven by changing dietary habits, with consumers increasingly seeking out healthier, organic, and exotic food options.

The Chinese market, however, is highly competitive and complex. It is dominated by both domestic producers and foreign exporters who have established strong footholds over the years. For Indonesian exporters, understanding the intricacies of the Chinese market, including consumer preferences, regulatory requirements, and distribution networks, is essential for success [5]. Products such as green beans, sweet potatoes, and coffee have shown potential, but they must meet stringent quality standards and cater to specific market niches.

Indonesian agricultural exports to China have historically lagged behind those of other ASEAN countries like Thailand and Vietnam, largely due to a lack of market knowledge, limited brand recognition, and logistical challenges. These barriers have constrained the growth potential of Indonesia's agricultural sector in the Chinese market. However, with the implementation of effective strategies and support from both government and private sectors, there is significant potential for improvement. Cooperative relationships among various stakeholders can provide farmers and processors with essential resources, technology, and market information to enhance their output, quality, and market access. For instance, funding, infrastructure development, market linkages, and policy advocacy supported by cooperative efforts with government agencies and commercial sectors are crucial for the expansion and sustainability of agricultural operations [6]. Strategic partnerships, such as those facilitated by organizations like Jamaah Tani Muhammadiyah, can help Indonesian farmers and processors navigate the complexities of the Chinese market, ultimately boosting their competitiveness and market presence.

In conclusion, the export of agricultural and processed food products is a vital component of Indonesia's economic strategy, offering numerous benefits from increased revenue to rural development. China's expansive market presents a promising opportunity, but it requires careful planning, quality improvements, and strategic collaborations to tap into its full potential. By leveraging its diverse agricultural base and improving its export capabilities, Indonesia can significantly enhance its presence in the global food market, particularly in China.

This article offers a fresh perspective on the opportunities and challenges facing Indonesia’s agricultural and processed food sectors in exporting to China by integrating comprehensive market analysis, unique case studies, and product-specific insights. It not only highlights key export opportunities like green beans, coffee, and porang, but also brings forward innovative strategies to overcome the significant barriers of regulatory standards and logistical complexities. The contribution of this research lies in its actionable recommendations tailored for stakeholders, from policymakers to exporters, aiming to

enhance market access and competitiveness. By providing a detailed analysis of consumer preferences and regulatory requirements in China, this study uniquely equips Indonesian exporters with the knowledge and tools to succeed in this dynamic market.

2 Methods

The research methodology for this study on the opportunities and regulations for exporting processed food products and agricultural outputs from Indonesia to China employs a multifaceted qualitative approach. This choice is particularly pertinent given that the research topic intersects with complex factors such as international trade regulations, product quality standards, consumer market demands in China, and market competition. Employing a qualitative framework allows for an in-depth exploration of these nuanced areas through various data collection techniques including interviews, observations, document analysis, and other qualitative methods [7].

This study prioritizes gathering insights from a diverse range of stakeholders in the trade of processed food products and agricultural goods. Key informants include Indonesian exporters, Chinese importers, government officials, and consumers. Utilizing qualitative surveys as a primary method, this research aims to collect comprehensive and detailed data on the perspectives and experiences of these participants[8]. This methodological choice is crucial for understanding the complex dynamics and challenges faced by stakeholders involved in this trade sector.

The core data collection technique employed is semi-structured interviews, which offer flexibility in addressing the evolving research focus based on participant responses while maintaining a structured framework of pre-determined questions to guide the discussion[9]. This approach facilitates a deeper understanding of the issues currently faced by Indonesian SMEs in exporting their goods internationally. Recognizing the need for practical solutions to these challenges, the research team from the University of Muhammadiyah Yogyakarta (UMY), in collaboration with the Special Branch Muhammadiyah (PCIM) in China, has initiated a webinar series. This platform is designed to address and strategize over the identified issues, by connecting Indonesian SMEs with experts and potential partners. It has conducted on Sunday, March 24, 2024, and was featured by key speakers: Adnan Aziz and Setiawan, founders and co-founders of the Hong Fang Investment Group Ltd in Kunming, China, and Adhita S. Prabakusuma, an expert in food safety and quality assurance. The webinar's theme focused on the export opportunities and requirements for Indonesian processed foods and agricultural products to China, aiming to equip participants with the necessary tools and knowledge to navigate this complex export landscape effectively. This event facilitated direct engagement and dialogue among participants, providing real-time insights and fostering collaborative problem-solving.

Document analysis is another critical component of the methodology. This involves examining trade regulations, export guidelines, market reports, and previous research studies to contextualize the qualitative data gathered from interviews and webinars. This triangulation of data sources ensures a comprehensive understanding of the regulatory and market environment, enhancing the reliability and validity of the findings.

The research methodology is further enriched by direct observations of trade practices and market conditions. These observations provide contextual data that complements the interview findings, offering a holistic view of the operational challenges and opportunities within the sector. This multi-method approach ensures that the research captures the full spectrum of factors influencing the export of Indonesian agricultural and processed food products to China.

Overall, this methodological design ensures a comprehensive understanding of the targeted export sector, fostering a practical and informed dialogue among stakeholders that

could lead to enhanced trade relationships between Indonesia and China. By integrating diverse qualitative methods, the study aims to provide actionable insights and strategic recommendations to improve the competitiveness and market access of Indonesian exporters.

3 Results and Discussion

3.1 Trade Relations and Export Trends between Indonesia and China

Understanding the historical context of trade relations between Indonesia and China provides a foundation for analyzing current and future opportunities. Historically, these two nations have engaged in trade for centuries, influenced by geographical proximity, complementary economies, and mutual interests. Over time, this relationship has evolved, with significant developments occurring in the late 20th and early 21st centuries, marked by bilateral agreements and increased diplomatic efforts to enhance trade cooperation.

Table 1. Trademap Bilateral trade between China and Indonesia [10]

Product label	China's import from Indonesia				
	Value in 2019	Value in 2020	Value in 2021	Value in 2022	Value in 2023
Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral...	9921571	9574441	22723673	22985530	21576211
Animal, vegetable or microbial fats and oils and their cleavage products; prepared edible fats; ...	3951225	3517329	6689635	7286253	6406150
Daily produce; birds' eggs; nattural honey; edible products of animal origin, not elsewhere….	220050	413070	350130	400488	491952
Rubber and articles thereof	478851	718057	511000	462406	452614
Oil seeds and oleaginous fruits; miscellaneous grain, seeds and fruit; industrial or medicinal	209728	177522	207411	380213	343770
Preparations of cereals, flom, starch or milk; pastrycooks' products	199357	193796	234396	263811	271226
Edible fmit and nuts; peel of citrus fruit or melons	97642	169791	211321	210364	224570
Coffee, tea, mate and spices	53012	145811	198129	178779	176094
Cocoa and cocoa preparations	95647	94368	136083	136910	158054
Tobacco and manufactured tobacco subsitutes; products, whether or not contain nicotine.....	73935	48027	47916	74442	62802
Preparations for vegetables, fruit, nuts or other part of plants	15651	12807	30091	33246	49528
Edible vegetables and certain roots and tubers	19605	34006	26714	17835	28684
Sugars and sugar confectionery	3596	15738	6980	4869	16871
Vegetable plaiting materials: vegetable products not elsewhere specified or included	7168	9254	4242	4456	5361
Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	283	303	237	423	813

The trade relationship between Indonesia and China dates back to ancient times when maritime trade routes facilitated the exchange of spices, textiles, and other goods. The historical Silk Road and later the Maritime Silk Route were critical channels through which traders from China and the Indonesian archipelago interacted. These early exchanges laid the groundwork for a long-standing economic relationship. The late 20th century saw a formalization of trade relations, particularly after Indonesia and China normalized diplomatic relations in 1990. This period was marked by the signing of several bilateral agreements aimed at boosting trade and investment (Table 1).

In recent years, Indonesia has seen varying trends in its exports to China (see Picture 1 above), driven by changes in both global and domestic markets. Key exports include palm oil, rubber, coal, and increasingly agricultural and processed food products. The trend analysis shows a growing demand for Indonesian food products, reflecting China's expanding middle class and changing consumer preferences. For instance, since 2019, Beijing has been the largest country-by-country purchaser of Indonesian palm oil, with 8.15 million tons of imports in that year., contributing significantly to the bilateral trade volume [11]. Additionally, rubber and coal remain staple exports, with China importing 1.75 million tons of natural rubber from Indonesia in the same year [12,13].

The growing middle class in China, coupled with urbanization and increasing disposable incomes, has led to a shift in consumer preferences towards healthier and more diverse food options. This presents a significant opportunity for Indonesian agricultural and processed food products. For example, Indonesia's coffee exports to China have seen a notable increase, with the value reaching USD 68.2 million in 2022, up from USD 50.5 million in 2020 [14]. This growth is driven by the rising popularity of coffee culture in urban China, particularly among younger consumers.

Jamaah Tani Muhammadiyah plays a critical role in supporting Indonesia's agribusiness sector. As a national organization overseeing agriculture, livestock, and fisheries, it provides essential services such as training, advocacy, and market access support. Jamaah Tani Muhammadiyah has been instrumental in promoting sustainable agricultural practices and improving the quality of Indonesian agricultural products. Through various programs, it has helped farmers adopt modern farming techniques, enhance productivity, and meet international standards.

One notable initiative by Jamaah Tani Muhammadiyah is its partnership with government agencies and private sector entities to facilitate the export of agricultural products. This collaboration has enabled farmers to access larger markets, including China. By providing training on export requirements and quality standards, Jamaah Tani Muhammadiyah has empowered farmers to navigate the complexities of international trade. Additionally, the organization has played a crucial role in advocating for policies that support agribusinesses and improve the competitiveness of Indonesian products in the global market.

China's market for agricultural and processed food products is characterized by significant size and rapid growth. The country's food market is projected to reach USD 1.5 trillion by 2025, driven by changing dietary habits and an increasing demand for high-quality, organic, and exotic food options [15]. The growing health consciousness among Chinese consumers has led to a surge in demand for healthier food products, including fresh fruits, vegetables, and organic foods. This trend presents an opportunity for Indonesian exporters to cater to these evolving consumer preferences.

The competitive landscape in China's food import sector is highly dynamic, with both domestic and international players vying for market share. Key players include large multinational companies and regional suppliers who have established strong distribution networks and brand recognition. For Indonesian exporters, understanding the strategies employed by these key players is crucial for successful market entry. For instance, Thailand

and Vietnam have been successful in capturing significant market shares in China due to their strategic marketing and consistent quality of products. Thailand's durian exports to China, valued at over USD 1.5 billion in 2022, exemplify the importance of product quality and effective market positioning [16].

In comparison, Indonesian products have unique strengths, such as the distinctive taste and quality of Indonesian coffee and tropical fruits like mangosteen and dragon fruit. To compete effectively, Indonesian exporters need to leverage these unique selling points and invest in building strong brand identities. Enhancing product quality through certifications and adhering to stringent food safety standards are also critical for gaining consumer trust and preference in the Chinese market.

Hongfang Investment Group Ltd. provides an illustrative case study of the transition from trading industrial machinery to agriculture. Established in Kunming, China, Hongfang initially focused on trading industrial machinery before shifting its attention to the agricultural sector in 2020. This strategic shift was driven by the increasing demand for agricultural products in China and the company's recognition of the potential in the Indonesian market. Hongfang's experience highlights the importance of adaptability and market responsiveness in the ever-changing trade landscape.

Hongfang has successfully exported green beans and sweet potatoes from Indonesia to China. These products have been well received due to their high quality and the company's ability to navigate regulatory requirements. However, the journey was not without challenges. Hongfang had to overcome hurdles related to import regulations, quality standards, and competition from other countries. The company employed a market entry strategy that included establishing partnerships with local suppliers, investing in quality control processes, and engaging in targeted marketing campaigns to build brand awareness [17].

Another success story is the export of Indonesian coffee, particularly the specialty coffee from regions like Aceh and Toraja. Indonesian coffee has gained popularity in China due to its unique flavor profile and quality. Companies exporting coffee have adopted strategies such as direct trade with coffee roasters, participation in international trade fairs, and leveraging social media to promote their brands. These efforts have paid off, as evidenced by the growing market acceptance and increasing export volumes. In 2022, Indonesia exported approximately 34,000 tonnes of coffee to China, reflecting a steady growth trend [14].

Porang, a lesser-known agricultural product, has also found a niche market in China [18]. Porang is valued for its glucomannan content, which is used in various food and industrial applications [19]. Indonesian exporters have capitalized on this demand by ensuring consistent supply and maintaining high processing standards. The success of porang exports illustrates the potential for niche products to achieve significant market penetration when backed by quality assurance and effective marketing.

In conclusion, the trade relations and export trends between Indonesia and China are deeply rooted in historical ties and have evolved significantly over time. The growing demand for Indonesian agricultural and processed food products in China presents a substantial opportunity for Indonesian exporters. Organizations like Jamaah Tani Muhammadiyah play a pivotal role in supporting this sector by providing training, advocacy, and market access support. Understanding China's market dynamics, competitive landscape, and consumer preferences is crucial for success. Case studies like Hongfang's transition and the success of Indonesian coffee and porang exports demonstrate the potential and challenges of entering the Chinese market. By leveraging their unique strengths, improving product quality, and adopting strategic market entry approaches, Indonesian exporters can enhance their presence and competitiveness in China’s burgeoning food market.

3.2 Opportunities, Challenges, and Strategies

Indonesia, with its diverse agricultural base, has significant opportunities to expand its exports to China, particularly in products such as green beans, coffee, and porang. However, realizing this potential involves overcoming various challenges, including stringent market entry barriers and logistical hurdles. By adopting targeted strategies to improve product quality, conducting thorough market research, and forming strategic partnerships, Indonesian exporters can enhance their competitiveness in the Chinese market.

Green beans present a notable opportunity for Indonesian exporters due to favorable production conditions and increasing demand in China. Indonesia's production capabilities are robust, with green beans being cultivated across several regions, including West Java and East Java. These regions benefit from suitable climatic conditions and fertile soils, enabling high yields. In 2022, the total volume of Indonesian green bean exports was 16.54 thousand tons with a value of IDR 314.90 billion [20]. The demand for green beans in China is driven by the country's growing middle class and the increasing popularity of healthy, plant-based diets. Chinese consumers value the nutritional benefits of green beans, which are rich in vitamins, minerals, and dietary fiber. To capitalize on this demand, Indonesian exporters must focus on maintaining high quality and consistency, meeting Chinese import standards, and effectively marketing their products to Chinese consumers.

Porang, also known as konjac, represents a niche but growing opportunity for Indonesian exports. Porang is valued for its glucomannan content, a dietary fiber used in various food and industrial applications. The differences in varieties and processing methods between Indonesian and Chinese porang present both challenges and opportunities. Indonesian porang, primarily grown in East Java and Lombok, is known for its high glucomannan content but tends to have a yellowish color, which differs from the whiter Chinese variety. To overcome this, Indonesian exporters can invest in advanced processing techniques to improve the color and quality of porang products. Additionally, there is potential for value addition through the production of porang-based products such as konjac flour and dietary supplements, which can command higher prices in the Chinese market. The export volume of Indonesian porang for the period January to February 2021 was USD 1.52 million, a 160.72% increase from the previous year. The volume of porang exports increased by 32.31% during the same period, reaching 965.5 tons [21]. Thailand, China, and Malaysia are the three main export destinations of porang.

Despite these opportunities, Indonesian exporters face significant market entry barriers in China. Regulatory requirements and standards are stringent, often necessitating extensive documentation, quality certifications, and adherence to specific import regulations. For instance, the General Administration of Customs of China (GACC) mandates rigorous inspection and quarantine procedures for agricultural imports, including detailed pesticide residue testing and compliance with food safety standards [22]. Navigating these regulations can be challenging, particularly for small and medium-sized enterprises (SMEs) with limited resources and experience in international trade.

Logistical challenges further complicate the export process. Transportation and shipping issues, including high costs and infrastructure limitations, affect the efficiency and cost-effectiveness of exporting to China. Indonesia's geographical archipelago structure poses additional challenges in consolidating and transporting goods from various production regions to export hubs. Moreover, the COVID-19 pandemic has exacerbated supply chain constraints, leading to disruptions and increased shipping costs globally. In 2021, global container shipping rates surged by over 200%, significantly impacting export costs [23]. Indonesian exporters must therefore explore innovative solutions to improve logistics efficiency, such as leveraging digital supply chain management tools and collaborating with logistics providers specializing in the Chinese market.

To overcome these challenges and succeed in the Chinese market, Indonesian exporters should adopt several strategic approaches. First, improving product quality is essential. This can be achieved through enhancing agricultural practices, such as adopting modern farming techniques, using high-quality seeds, and implementing integrated pest management. Additionally, processing methods should be upgraded to ensure that products meet international quality standards. Obtaining certifications such as GlobalGAP, ISO, and HACCP can also enhance product credibility and marketability [24].

Conducting thorough market research and analysis is another critical strategy. Understanding consumer preferences, market trends, and competitive dynamics is essential for identifying niche markets and unique selling propositions. For example, while Chinese consumers generally prefer green beans for their nutritional benefits, highlighting specific health benefits or unique culinary uses can differentiate Indonesian products. Similarly, promoting the unique flavor profiles and sustainable production practices of Indonesian coffee can attract environmentally conscious consumers.

Forming partnerships and collaborations with Chinese partners can also improve market access and competitiveness. Building relationships with local distributors, retailers, and industry associations can provide valuable insights into market dynamics and consumer behavior. Leveraging local expertise and networks can facilitate smoother market entry and help navigate regulatory and logistical challenges. In China, a joint venture is typically comprised of a foreign entity and a local Chinese partner who collaborate to establish a new enterprise. This partnership combines resources, knowledge, and expertise to facilitate mutual development. These ventures can take on a variety of forms, such as joint sales and marketing efforts or shared manufacturing facilities, with the objective of navigating the intricacies of the local market and accessing the extensive Chinese consumer base [25].

While there are significant opportunities for Indonesian agricultural and processed food products in the Chinese market, realizing this potential requires addressing various challenges. By improving product quality, conducting comprehensive market research, and forming strategic partnerships, Indonesian exporters can enhance their competitiveness and successfully penetrate the Chinese market. Green beans, coffee, and porang are key products with substantial growth potential, provided that exporters can meet the stringent regulatory requirements and navigate logistical hurdles effectively. The dynamic and rapidly growing Chinese market offers immense possibilities, and with the right strategies, Indonesian agribusinesses can capitalize on these opportunities to drive growth and economic development.

4 Conclusion

The burgeoning trade relationship between Indonesia and China presents significant opportunities for the export of Indonesian agricultural and processed food products. Products such as green beans, coffee, and porang have shown substantial potential due to favorable production conditions in Indonesia and growing demand in China. However, to fully capitalize on these opportunities, Indonesian exporters must navigate several challenges, including stringent market entry barriers, logistical issues, and intense competition.

To address these challenges and enhance the competitiveness of Indonesian products in the Chinese market, several policy recommendations are essential. Firstly, government support plays a crucial role in facilitating trade. Policy measures that streamline export processes, reduce bureaucratic hurdles, and provide financial incentives for exporters can significantly bolster the export sector. Additionally, negotiating favorable trade agreements with China can help secure better market access and reduce tariff and non-tariff barriers. Strengthening diplomatic and economic ties through bilateral and multilateral trade

agreements will be pivotal in ensuring that Indonesian products remain competitive in the Chinese market.

Capacity building is another critical area that requires attention. Providing training and development programs for farmers and processors can enhance their skills and knowledge, enabling them to adopt best practices and improve product quality. Government and industry stakeholders should invest in technological advancements and innovations to boost productivity and ensure that agricultural practices meet international standards. This includes promoting the use of high-quality seeds, modern farming techniques, and sustainable agricultural practices. Enhancing the processing capabilities of Indonesian agribusinesses is also vital. Investments in state-of-the-art processing facilities and technologies can help maintain product quality and consistency, meeting the stringent requirements of the Chinese market.

Furthermore, implementing comprehensive quality control measures and obtaining relevant certifications such as GlobalGAP, ISO, and HACCP can enhance the credibility and marketability of Indonesian products. Ensuring that products adhere to international food safety and quality standards will build consumer trust and preference, facilitating smoother market entry and acceptance. Forming strategic partnerships and collaborations with Chinese counterparts can also improve market access and competitiveness. Building relationships with local distributors, retailers, and industry associations can provide valuable insights into market dynamics and consumer behavior, facilitating more effective market entry strategies. Collaborative ventures, such as joint ventures or strategic alliances with Chinese companies, can enhance market presence and expand distribution channels, leveraging local expertise and networks to navigate regulatory and logistical challenges.

Based on this study, it can be argued that the potential for Indonesian agricultural and processed food products in the Chinese market is immense. By implementing targeted policy measures, investing in capacity building, and forming strategic partnerships, Indonesian exporters can overcome the challenges they face and enhance their competitiveness. The dynamic and rapidly growing Chinese market offers vast opportunities for growth and economic development. With the right strategies, Indonesia can significantly increase its export volumes, contributing to economic prosperity and strengthening its trade relationship with China.

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