

ANALYSIS OF MARKET STRUCTURE, CONDUCT, AND PERFORMANCE OF THE LEMURU FISH IN MUNCAR DISTRICT, BANYUWANGI REGENCY, EAST JAVA

ANALISIS STRUKTUR, PERILAKU, DAN KINERJA PASAR IKAN LEMURU DI KECAMATAN MUNCAR, KABUPATEN BANYUWANGI, JAWA TIMUR

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ABSTRACT

In general, the marketing of fishery products is potentially inefficient. This study aims to analyze the structure, conduct, and performance of the Lemuru fish market in Muncar District, Banyuwangi Regency. The method used to analyze the data obtained at the research site is descriptive qualitative quantitative. The results showed that the structure of the Lemuru fish market formed a tight oligopoly market and concentrated on fish collectors. The CR4 value is 90% for collectors, 30% for retailers, and 18% for fishers. The shape of the market structure affects market conduct where traders are in the price-makers position while fishers are price-takers. The form of vertical business integration in the Lemuru fish market is a cooperation between collectors and retailers to increase profits and dominate the market. The causal relationship between market structure and market conduct forms an efficient market performance with share values in both marketing channels exceeding the standard efficiency values set at 47.37% in channel I and 52.94% in channel II. The results of this study indicate the importance of the role of local governments in carrying out fish auctions according to their functions, providing counseling on fishery capital loan programs, and processing added value to fishers. In addition, this research is also helpful for fishers related to loans for fishing businesses, prices, market needs, and added value of Lemuru fish.

Keywords: Lemuru fish market, market structure, market conduct, market performance.

ABSTRAK

Pada umumnya pemasaran hasil perikanan berpotensi tidak efisien. Penelitian ini bertujuan untuk menganalisis struktur, perilaku, dan kinerja pasar ikan Lemuru di Kecamatan Muncar, Kabupaten Banyuwangi. Metode yang digunakan untuk menganalisis data yang didapatkan di lokasi penelitian adalah deskriptif kualitatif kuantitatif. Hasil penelitian menunjukkan bahwa struktur pasar ikan Lemuru membentuk pasar oligopoli ketat dan terkonsentrasi pada pengepul. Nilai CR4 adalah 90% untuk pengepul, 30% untuk pengecer, dan 18% untuk nelayan. Bentuk struktur pasar mempengaruhi perilaku pasar dimana pedagang berada pada posisi *price-maker*, sedangkan nelayan sebagai *price-taker*. Bentuk integrasi bisnis vertikal di pasar ikan Lemuru antara lain kerjasama antara pengepul dan pengecer untuk meningkatkan keuntungan dan menguasai pasar. Hubungan kausal antara struktur pasar dan perilaku pasar membentuk kinerja pasar yang efisien dengan nilai pangsa di kedua saluran pemasaran melebihi nilai efisiensi standar yang ditetapkan sebesar 47,37% di saluran satu dan 52,94% di saluran dua. Diharapkan pemerintah daerah menjalankan pelelangan ikan sesuai fungsinya, memberikan penyuluhan program pinjaman modal perikanan dan pengolahan nilai tambah. Diharapkan para nelayan menemukan sumber informasi terkait pinjaman untuk usaha penangkapan, harga, kebutuhan pasar, dan nilai tambah ikan Lemuru.

Kata kunci: pasar ikan lemuru, struktur pasar, perilaku pasar, kinerja pasar.

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INTRODUCTION

Based on data from Statistics Indonesia, Banyuwangi Regency (2020), capture fisheries production in Banyuwangi Regency has excellent potential, amounting to 61,826.90 tons in 2019. Thus, this potential is useful for the government to determine policies to increase the utilization of this potential. This is in accordance with Pratama et al. (2016), that to increase economic growth in the fisheries and marine sector, the government must fix deficiencies in coastal areas to continue to maintain good economic growth.

Capture fisheries production areas in Banyuwangi Regency are spread over several sub-districts, and one of them is the coastal port of Muncar in the coastal waters of the Bali Strait in Kedungrejo village, Muncar district, Banyuwangi Regency, and the many types and sizes of fishing vessels operating in this area (Perkasa et al., 2016). Capture fisheries production in this port is obtained from fishers' catch who use fishing gear such as Ring Net or Purse Seine, lift net, and Gill Net. The fish caught include Lemuru, Skipjack Tuna, Mackarel Tuna, Mackerel, Mackerel Scad, Ariid Catfish, Hairtail, Anchovy, Petek, Squid, and others (Saputra, 2018). This is in line with the opinion Purwaningsih (2015), wherein 2009, the number of fish landed at the coastal fishing port (PPP) Muncar was 34 thousand tons of fish, of which 28 thousand tons were Lemuru. In general, marketing of fishery products is potentially inefficient because fishery commodities have distinctive characteristics, namely Perishability, Seasonal, Bulkiness (requires ample and refrigerated space for fresh fish storage), and Non-homogeneity (Abidin, 2017). This fish characteristic causes many intermediary traders to be involved and results in a total increase in marketing costs which allows for a disproportionate share of the costs incurred by market participants.

In addition, another problem that occurs in the capture fisheries business is the weak position of fishermen due to limited capital and their lack of information on the market price of Lemuru. Fishers with limited capital borrow capital from collectors agreeing that their catch must be sold to fish collectors. From this relationship pattern, fishers are in a low position as price takers and cause fishers' income in Muncar District to be low. Data from the Maritime Affairs and Fisheries Ministry (2020) shows that the average price margin between producers and consumers is more than 50% which theoretically indicates the size of the share received by fishermen. The smaller the value of farmers, the less the marketing channel is inefficient (Sustiyana & Iswahyudi, 2019). Therefore, there is a need for research related to analyzing the Lemuru fish market in Muncar District, Banyuwangi Regency. This study aims to analyze the structure, conduct, and performance of the Lemuru fish market in Muncar District, Banyuwangi Regency.

The structure, conduct, and performance (SCP) approach can be used to analyze the inefficiency of the marketing system in terms of the causal relationship that is formed. Company conduct in the market is influenced by market structure and affects the performance of companies in the market (Nendissa et al., 2018). One of the proposed conceptual frameworks Azhara (2016), shows the market structure is formed by market supply and demand conditions. While the market's conduct is influenced by market structure, and market performance is further influenced by the

conduct of the market simultaneously. Asmarantaka et al. (2017), also argues that there is a causality relationship between the variables SCP. Several studies of inefficient marketing system analysis using the SCP approach include Azhara (2016) related to milkfish market analysis, Abubakar (2016) examining Cocoa beans marketing channels, Roy (2018) related to cattle market analysis in East Nusa Tenggara. Their research analysis shows that inefficiencies in market performance consist of causality of market structure and influencing market behavior.

A common problem faced by fishermen is the imperfect competition market with traders where fishermen do not have market power to determine the price of their catch products when compared to traders. The market power of traders comes from mastering market information, and cooperation with retailers with the aim of increasing profits and market share. There are many studies on the causal relationship between the inefficiency of the marketing system in the fisheries sector, including Azhara (2016) a study on milkfish marketing in West Java, Asmarantaka (2017) a study on marketing concepts, Abidin (2017) a study on fishery product marketing, and Abubakar (2016) study on the marketing of cocoa beans.

From previous studies, the correlation between the characteristics of perishable food in fishery products, especially Lemuru fish, on price fluctuations, structure, and conduct of marketing agency, and market performance has not been carried out. There is a possibility that the nature of perishable food in fishery products affects the characteristics of marketing agencies. In previous studies, there has been no analysis of business integration related to the conduct of business integration to increase profits and control marketing channels. These two studies become the basis for achieving the research purposes, analyzing the market structure, conduct, and performance of the Lemuru fish market in Muncar District, Banyuwangi Regency.

RESEARCH METHODS

Research Sites and Samples

The research location is in Muncar District, Banyuwangi Regency, East Java, Indonesia. The study was conducted in January-March 2021. There were two groups of respondents, namely fishers (61 people) and marketing agencies (25 people). A sampling of fishers is selected by using a random sampling method with Slovin calculation. According to Nugraheni et al. (2018), the Slovin formula is $n = N/(N.d.d+1)$ where n = sample size, N = population size, d = sampling error (10%, and marketing agencies are using snowball sampling method.

Data Analysis

In this study, the researcher uses primary and secondary data. Primary data are obtained from interviews with respondents and direct observation at the research site, while the collection of secondary data was taken from Statistic Indonesia (East Java and Banyuwangi), Banyuwangi Regional Revenue Agency, and the Department of Fisheries and Food Banyuwangi.

This research uses descriptive qualitative, and quantitative methods. In the market structure, there are four indicators of analysis: quantitative descriptive analysis on market share and market

concentration, as well as qualitative descriptive analysis on the ratio of the number of sellers and buyers, and product differentiation. In market conduct, descriptive qualitative analysis is carried out, such as pricing, marketing functions, business integration, marketing strategies of a marketing agency. While on market performance, quantitative descriptive analysis was carried out, namely marketing margin, farmer's share, and marketing efficiency.

Market concentration can be analyzed with market share and CR4. Here is the formula of market share:

$$MS_n = \frac{S_i}{S_{tot}} \times 100\% \quad (1)$$

Where MS_n is market share n (percent), S_i is the sale of the Lemuru trade n (kg/month), S_{tot} is total sales of Lemuru fish at the fish landing port (kg/month) while the CR4 formula is:

$$CR4 = \frac{\sum MS_4}{\sum MS_{tot}} \times 100\% \quad (2)$$

Where, $\sum MS_4$ is the total market share of the four largest buyers, and $\sum MS_{tot}$ is the total market share in all markets.

On market performance, fishers' marketing margin analysis can be done by using the formula:

$$MP = H_k - H_n \quad (3)$$

Where, MP is marketing margin, H_k is the price at the consumer level (Rp/kg), and H_n is price level in the fisher (Rp/Kg). Whereas the marketing agencies use the formula:

$$MPL_i = H_j - H_b \quad (4)$$

Where, MPL_i is the Marketing margin at the marketing agency level, H_j is selling price at marketing agency level i , and H_b is the purchase price at the agency level marketing number i . In the farmer's share analysis, market performance can be analyzed using the formula:

$$Fs = \frac{P_f}{P_r} \times 100\% \quad (5)$$

Where, F_s : farmer's share, P_f is the price of Lemuru fish at the fishers, and P_r is Lemuru fish price at the consumer level (Januwia et al., 2014). While market performance analysis, the formula is:

$$MEI = \frac{FP}{BP + MP} \quad (6)$$

Where, MEI is Marketing Efficiency Index of Lemuru fish, FP is Farmer's price, BP is Marketing costs, and MP is marketing margins.

RESULT AND DISCUSSION

Market Structure

Comparison of Sellers and Buyers

From the research data, there are three marketing agencies in Lemuru fish marketing in Muncar District: fishers, collectors, and retailers. The comparison of sellers and buyers in the Lemuru fish market is presented in Table 1.

Table 1. Comparison of the Number of Sellers and Buyers of Lemuru Fish in Muncar District

Marketing Channel	Market Level	Number of Seller (Person)	Number of Buyers (Person)
1	Fisherman-Chopper	50	5
	Collector-Retailer cooperation	5	7
	Consumer-cooperation retailer	7	Many
	Fisherman-Chopper	50	5
	Collector-retailer	5	13
	Retailer-Consumer	13	Many
	Fisherman-Chopper-Factory	5	Many
2	Fisherman-Retailer	11	13
	Retailer-Consumer	13	Many

Source: Primary Data Processed, 2021.

Based on Table 1, the number of sellers of Lemuru fish in each marketing channel is more than the number of buyers except at the market level of collectors to retailers. From the description of these conditions, it can be seen that market concentration tends to occur at the market level of fishermen to collectors because the ratio between the number of fishermen as sellers is more than the number of buyers, namely collectors. While at the market level from collectors to retailers there is market concentration because the number between sellers, namely collectors, is less than the number of buyers, namely retailers.

Market Concentration

In the analysis of market concentration, from 61 respondents of fishers, there is not a single market share value that exceeds 10%. It means that the market structure formed at the fisherman level is a tight oligopoly market. The highest value of the market share at the collector's level is 40%, while the retailer level is 8.75%. From the two market shares resulting from collectors and retailers, CR4 is applicable to detect the market competition.

CR4 analyses were conducted at the level of fishers, collectors, and retailers. It showed that CR4 value of fishers was 18%, and the collectors were 90%. Thus, from the calculation, the market formed in the level of collector is a tight oligopoly (Sinaga et al., 2014). Meanwhile, at retailers, the calculation result of the CR4 value was 30%.

Product Differentiation

Product differentiation analysis is carried out to determine whether competitive markets are formed among fishers, collectors, and retailers. From the results, the absence of product differentiation efforts made by fishermen, collectors, and retailers causes the competitive market formed at retailers to be a perfectly competitive market. The condition of the absence of product differentiation in the Lemuru fish market is in line with research conducted by Apriono et al. (2014) related to catfish marketing, Azhara (2016) related to milkfish marketing in West Java, Nendissa et al. (2018), related to marketing of beef cattle in East Nusa Tenggara.

Barriers to Entry

There were two types of market barriers, natural and non-natural barriers. Based on the interviews and observations, it could be seen that there were non-natural and natural barriers to entry into the market at the level of fishers. Non-natural obstacles were regulations from the government regarding capture fisheries business permits and limited fishing capital. Meanwhile, the natural obstacle for fishers is erratic weather changes that affect fishers looking for fish in the sea, and they cannot enter the market without marine products.

For collectors, non-natural barriers were found in the Lemuru fish market. This barrier shapes a tight oligopoly in the market concentration levels of collectors, which inhibits new collectors of Lemuru fish enter the market. In addition, there is a cooperative relationship between collectors and fishers through fishing capital loans on the condition that fishers' catch must be sold to collectors. This makes it difficult for new collectors to enter the Lemuru fish market. For retailers, a form of non-natural obstacle in the Lemuru fish market is the collaboration between collectors and retailers. The retailer gives some money to the collectors to get top priority regarding the sale of Lemuru fish. This condition becomes an obstacle for new retailers to enter the market because they are constrained by the availability of product sales (Lemuru fish) that they can get.

Market Conduct

Pricing Process

Based on the results of a survey conducted at the research location, the determination of the price of Lemuru fish is carried out through a bargaining process, but the dominance of the monopoly market structure formed by the collectors has a significant influence on the structure of the perfectly competitive market at the fisher's level. Collectors and retailers are more aware of price information from supply and demand conditions on the Lemuru fish marketing channel when compared to fishers. This condition occurs because collectors and retailers spend more time trading in the market and have direct contact with consumers, while fishers spend more time at sea, which impacts their lack of knowledge regarding the information on Lemuru fish prices at the consumer level.

The collectors have higher bargaining power than fishers since they know more about the price and quantity of Lemuru demanded in the market as well as capital cooperation with fishers. In comparison, fishers have lower bargaining power due to limitations of price information and market needs, fishing capital, and the perishability of Lemuru fish related to quality and price. This condition makes the position of fishermen to be price takers while collectors are price makers (Baloch, 2017).

Implementation of Market Functions

The collectors are the most dominant agent carrying out marketing functions, such as exchanging, physical, and facilitating marketing. Meanwhile, the fishers do not carry out the exchange marketing function, namely purchasing, because fishers are producers of Lemuru and do not serve the facilitating function, namely storage. Fisher's role only sells their fish directly after fishing to get profits. The retailers also do not do storage and sorting facilitating functions.

Business Integration

Analysis of business integration at the fisherman level, the business integration formed is vertical and horizontal. There are two types of vertical integration, forward and backward. The backward vertical integration relationship occurs between fishers and traders. Vertical integration of fishers and collectors is in the form of fishing capital loans for fishers. For the collectors, the backward vertical integration is found in the business relationship between the collectors and fishers. The backward vertical integration is the existence of fishing capital loan agreements from the collectors to fishers. The next backward vertical integration, where the retailers guarantee the collectors, sells the Lemuru fish only to the retailers. The form of vertical forward business integration found in fishers and collectors is sorting fishers' catches by type of fish.

In addition, fishers and marketing agencies at the Lemuru fish market also carry out horizontal integration, for example, selling other types of marine fish, such as skipjack fish, mackerel, yellow tail, red snapper, white snapper, baronang fish, and other marine fish species. The background of the diversification of the fishing effort and marketing agencies is based on the variety of fish types caught by fishers. When fishers catch fish during the Lemuru fishing season, other types of fish are caught. When fishermen carry out fishing activities outside the Lemuru fishing season, they catch other fish types to maintain their income from marine fishing.

Marketing Strategy

There are two points of view in the analysis of marketing strategies at the fisher's level. First, fishers have the advantage, such as a guarantee to sell out fish to the collectors. In these conditions, the fishers did not have a specific strategy to market their product. The next view point, the fishermen could not sell their catch to other merchants since they are bonded by the collector's capital. This condition is in line with Suroyya *et al.* (2014), where the marketing of caught fish is carried out directly.

Marketing strategies at the level of the collector are shown in the form of capital cooperation with fishers to get Lemuru fish and collaboration with retailers who provide security deposits to get a priority for selling Lemuru fish. In this condition, the collectors get additional capital benefits to provide loans to fishers and consumers of Lemuru fish. These two marketing strategies were being the formation of a tight oligopoly market at the collector level. The last, marketing strategy at the level of retailers is a collaboration carried out by several retailers to collectors in the form of advances or signs. This cooperation aims to get the highest priority on the sales of Lemuru fish from the collectors. The retailers carry out this strategy to maintain the continuity and quality of Lemuru fish obtained from collectors.

Market Performance

Marketing Margin

Marketing margin analysis is divided into two parts, institutional margin, and farmer's share. According to the research data, it is known that there are two marketing channels. The first channel consists of fishers, collectors, and retailers. While the second channel includes fishers and retailers.

In the first channel, the margin value of marketing agency one is IDR 3,000, and marketing agency two is IDR 2,000. While in the second channel, the margin value of the formed marketing agency is IDR 4,000. There is a difference in marketing margin between channel-I and channel II, and the amount is IDR 1,000. The difference comes from the length of the channel-I compared to the channel-II. This finding is relevant to previous research conducted by Pratiwi and Lukytawati (2013), where the longer the marketing channel, the higher the marketing margin formed.

In addition, the difference in marketing margins happens to the difference in the purchase price received by retailers in channels I and II. In channel I, the retailer gets a higher price than retailers in channel II. The channels-I retailers buy Lemuru fish from collectors, while the retailers in channel II are from the fishermen. The lack of price information obtained by fishermen impacts the high profit of retailers in the marketing channel II, which is IDR 4,500. It happens because the retailers have higher bargaining power in the market. Bargaining power is related to the market price information of Lemuru fish from marketing activities to consumers. The retailers got high profits because there is no special treatment carried out by retailers to sell Lemuru fish to consumers.

Farmer's Share

From the calculation of the farmer's share analysis carried out on both marketing channels, it can be seen that the farmer's share value in channel-I is 47.37%, while in the channel-II is 52.94%. The difference in the value of the farmer's share can occur because channel II is shorter than channel I. This finding is in line with the research by Sukayana *et al.* (2013), where the larger the share received by fishermen comes from, the shorter the marketing channel formed. In addition, the value of the farmer's share of fishers in the marketing channel is more than 40%, and it can be concluded that marketing channels I and II in marketing Lemuru fish can be said to be efficient. This conclusion is based on the reference from the previous research by Muslim and Darwis (2012), where the efficient marketing channel can be identified from the farmer's share value that was more than 40%.

While, based on the analysis of agency share carried out on channel I, the share value of marketing agency I is 31.58%, while the share of agency II is 21.05%. These calculations indicate that channel I in Lemuru fish marketing was not efficient because the share value is below 40%. In channel II, the share value of the agency was 47.06%, and it means that channel II of Lemuru fish marketing was efficient. In addition, the value of the farmer's share formed by fishermen and marketing agencies was different to the length of the marketing channel, market structure and conduct, and implementation of marketing functions. This conclusion is based on the reference from the research that has been done by Downey and Erickson (1992), where the marketing channel can be said to be efficient if it has a farmer's share value of more than 40%.

Marketing Efficiency

The calculation of marketing efficiency of Lemuru fish in Muncar based on Marketing Efficiency Index (MEI) can be seen in Table 2.

Table 2. Marketing Efficiency Value of Lemuru Fish in Muncar District

Marketing Agency	Marketing Channel-I			Marketing Channel-II		
	Value (IDR/Kg)	Margin (IDR)	MEI (%)	Value (IDR/Kg)	Margin (IDR)	MEI (%)
Fisherman						
Production cost and marketing	2,750			3,050		
Selling price	4,500			4,500		
Profit	1,750			1,450		
Collector						
Purchase price	4,500					
Marketing costs	500					
Selling price	7,500	3,000	0.51			0.6
Profit	3,500					
Retailer						
Purchase price	7,500			4,500		
Marketing costs	500			500		
Selling price	9,500	2,000		8,500	4,000	
Profit	2,500			4,500		
Total		5,000			4,000	

Source: Primary Data Processed, 2021.

From Table 2, it can be seen that MEI value on the channel I is 0.51, while on the channel II is 0.60. Based on the MEI, marketing channel II is more efficient than channel I. Although the Lemuru fish marketing channel II is more efficient than the marketing channel I, the difference in the MEI value of the channel II was small (0.09). There are some differences in both marketing channels of Lemuru fish. Some notable differences were found in both marketing channels that include differences in production and marketing costs incurred by fishermen and marketing agencies, the difference in the selling price of Lemuru fish on marketing channels-I and II, as well as significant differences in the purchase price received by retailers.

CONCLUSIONS AND SUGGESTION

Conclusions

The structure of the Lemuru fish market in Muncar District was a tight oligopoly market where the market was concentrated on fish collectors. The CR4 value is 90% for collectors, 30% for retailers, and 18% for fishers. While the fishermen, the market structure formed was a perfectly competitive market. The market conduct of marketing agencies formed from the market structure of Lemuru fish was: (1) being the price maker, (2) conducting vertical integration relationships to control the market, and (3) the number of marketing functions carried out. Meanwhile, the market conduct is formed by fishers, where fishers were positioned as price takers. This condition was formed from the low market power of fishers because they did not get information on fish market prices, and there was a capital cooperation relationship. Based on the value of the marketing margin, the farmer's share, and Marketing Efficiency Index (MEI) indicated that the performance of Lemuru fish market in Muncar District was inefficient. In addition, MEI, showed that another marketing channel II was more efficient than marketing channel I because marketing channel II was shorter than marketing channel I.

Suggestion

Local authorities should implement fish auctions in the fishing port of Muncar according to its function to increase the selling price Lemuru and as a price information center to overcome the limitations of price information and fishing. It is expected that local government programs to reach fishers, for example, related to the capital limitations on fishing, handling, and processing fish to increase the value of Lemuru fish.

Fishers need to know information related to price and fishing capital loans to be freer to sell the fish. This aims to increase their income. The importance of handling and the fish processing process aims to increase the value of selling Lemuru fish. For future study, the researcher suggests the upcoming study to focus on the relation to the handling and post-processing of Lemuru fish in Muncar District to increase the market power of fishers in terms of improving the value of the catch.

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