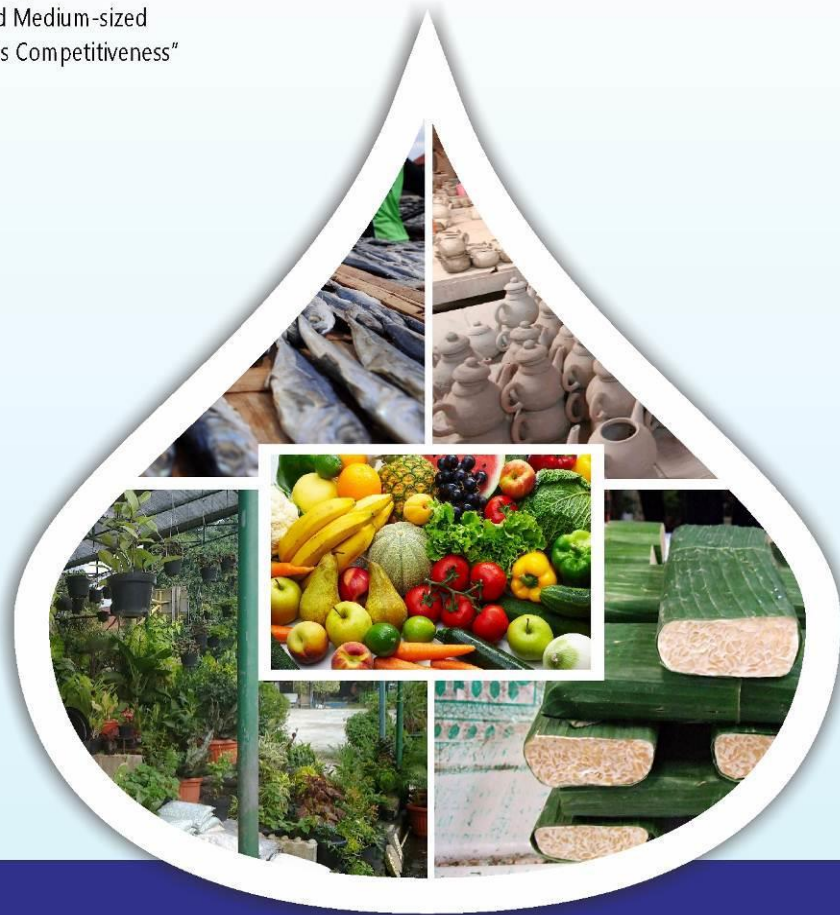




2016

"Small and Medium-sized
Enterprises Competitiveness"

ISBN 978-602-7577-70-1



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Agribusiness Development for Human Welfare



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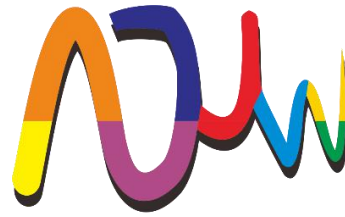
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AGRIBUSINESS
DEVELOPMENT FOR
HUMAN WELFARE

*“Small and Medium-sized
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EDITOR FOREWORD

The economic integrations by ASEAN certainly have given a major influence on Small and Medium-sized Enterprises (SMEs). Beside economic integration in the form of free trade area (FTA) that has been going on since the early 2000s, economic integration in the form of ASEAN Economic Community (AEC) has been ongoing since the beginning of 2016. Through this integration, SMEs have opportunity to expand access to markets, technology, and capital. But at the same time SMEs are required to improve their competitiveness in order to survive in the market.

In order to explore ideas, concept, and innovations related to the competitiveness of SMEs, International Conference on Agribusiness Development for Human Welfare (ADHW 2016) was held in Yogyakarta on May 14, 2016. The conference organized by Department of Agribusiness Universitas Muhammadiyah Yogyakarta, in collaboration with Department of Agribusiness and Information System Universiti Putra Malaysia, Department of Agro-Industrial Technology Kasetsart University, Department of Agriculture Socio-Economics Universitas Gadjah Mada, Department of Agriculture Socio-Economics of Universitas Brawijaya, Indonesian Society of Agriculture Economics, Agribusiness Association of Indonesia. Hopefully proceedings of ADHW 2016 provide stimulus for increasing competitiveness of SMEs in ASEAN, especially in Indonesia.

Furthermore, we are grateful to Allah, the Sustainer of all word, who always makes it easy for our affairs. We would like to acknowledge with thanks to all the institution and individual who joined with resources and efforts in organizing the conference that resulted in the papers which are published in this proceeding. Special thanks to all authors and discussants who contributed with their intellectual capital and responded to our call papers. Thanks and acknowledgment are also due to all reviewers of the conference who helped in evaluating submitted papers; and to the members of the Organization Committee, who ensured smooth execution of the event.

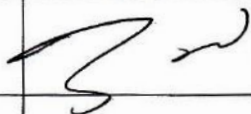
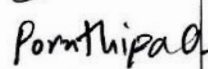

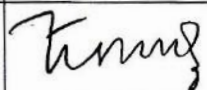
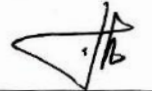
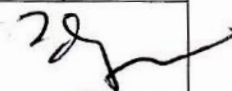
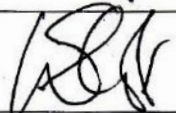
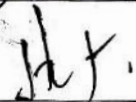
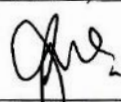

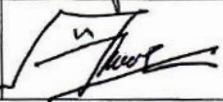
May 30, 2016

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11	Ir. M. Kismuntono	LIPI	

PREFACE

Assalaamualaikum, Warahmatullaahi., Wabarakaatuh.
Dear Honorable Governor of Yogyakarta Special Province
Dear respectable Prof. Dr. Zainal Abidin Mohamed
Dear respectable Asist. Prof. Pornthipa Ongkunaruk
Dear respectable Rector of UMY Prof. Dr. Bambang Cipto, MA.
Dear all invited Guests, Speakers, and Participants of International seminar of ADHW 2016.

Alhamdulillah, all praise be to the Almighty God, so that we can be gathering here today at Muhammadiyah University of Yogyakarta in order to attend the Conference on Agribusiness Development for Human Welfare (ADHW) 2016.

Ladies and Gentlemen,

On behalf of the committee, I would like to say welcome to this International Conference on ADHW 2016 and thank you for attending our invitation.

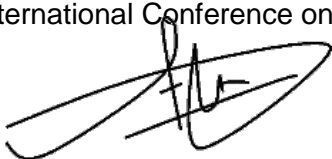
Especially, we are grateful to invited speakers, Prof. Zainal Abidin Mohamed and Asist. Prof. Pornthipa Ongkunaruk, for their willingness to share information and thoughts in this conference. As a bit report, that this conference has been attended by 85 speakers coming from five countries.

This conference entitled "Small and Medium-sized Enterprise Competitiveness". ASEAN Economic Community is the largest economic integration that is going to be implemented at the beginning of 2016 (December 31, 2015). Through this integration, SMEs will have opportunity to expand access to markets, technology, and capital. But at the same time SMEs are required to improve their competitiveness in order to survive in the market. We expect that this seminar is capable of producing thoughts building SMEs within ASEAN, especially Indonesia, to face the free trade.

This event can be done by support and efforts from all sides. Therefore, I would like to say thank you to all committee members having worked hard to conduct this event. We, as the organizer committee, do apologize when there is a shortage in conducting this event.

Wassalamualaikum, Warahmatullaahi., Wabarakaatuh.

Chairman
International Conference on ADHW 2016



Dr. Aris Slamet Widodo, SP., MSc.

WORDS OF WELCOME

Assalamu'alaikum warahmatullahi wabarakatuh

Alhamdulillah, all praise be to Allah SWT, who has given us His blessings so that this International Seminar of Agribusiness Development for Human Welfare (ADHW) 2016 entitled "Small and Medium-sized Enterprises Competitiveness" can be conducted. This International Conference is held in cooperation among Agribusiness Study Program of Muhammadiyah University of Yogyakarta with Putra University of Malaysia (UPM), Kasetsart University (KU), Association of Indonesian Agricultural Economy (PERHEPI), and Agribusiness Association of Indonesia (AAI), Universitas Gadjah Mada (UGM) and Universitas Brawijaya (UB).

Countries of ASEAN members like Indonesia, Malaysia, and Thailand have more than 90% Small and Medium-sized Enterprises (SMEs). In general, SMEs play important role in economic developments such as in terms of employment, added value, improve foreign exchange, and economic growth. For Indonesia, the role of SMEs is limited to employment and added value, while the foreign exchange from SMEs is still low. According to the General Director of SMEs of Industrial Ministry, in 2013 the total SMEs being able to pass through export market is just under 5 percent. For that required many breakthrough and innovation so that the role of SMEs becomes real economic development, especially in Indonesia, and generally in ASEAN countries.

On behalf of Agribusiness Department of Universitas Muhammadiyah Yogyakarta, we would like to express our gratitude Putra University of Malaysia (UPM), Kasetsart University (KU), Association of Indonesian Agricultural Economy (PERHEPI), Agribusiness Association of Indonesia (AAI), Universitas Gadjah Mada (UGM) and Universitas Brawijaya (UB) for all supports, sponsors, and all committee members having worked so hard that this International Conference can be conducted.

Hopefully, these synergies coming from various parties can provide contribution for developing SMEs in Indonesia and other ASEAN countries as well.

Wassalamu'alaikum warahmatullahi wabarakatuh

Head of Agribusiness Department
Universitas Muhammadiyah Yogyakarta



Ir. Eni Istiyanti, MP.



Gubernur

Daerah Istimewa Yogyakarta

Sambutan
KONFERENSI INTERNASIONAL
“AGRIBUSINESS DEVELOPMENT FOR HUMAN WELFARE”
Yogyakarta, 14 Mei 2016

Assalamu'alaikum Wr. Wb.

Salam sejahtera untuk kita semua.

Yang Saya hormati :

- Rektor Universitas Muhammadiyah Yogyakarta;
- Para Narasumber;
- Hadirin dan Para Peserta yang berbahagia,

Puji dan syukur marilah kita panjatkan kehadirat Allah SWT karena hanya atas limpahan rahmat serta karunia-Nya, kita dapat hadir pada kesempatan acara **Konferensi Internasional “Agribusiness Development For Human Welfare”** ini dalam keadaan sehat wal’afiat.

Pada kesempatan kali ini, secara ringkas Saya akan menyampaikan mengenai industri kecil menengah nasional yang menjadi tema pada pembukaan Seminar Internasional “Agribusiness Development For Human Welfare” ini.

Hadirin dan Saudara-saudara sekalian yang Saya hormati,

Berdasarkan data BPS, pertumbuhan industri pengolahan nonmigas pada tahun 2015 secara kumulatif sebesar 5,04%; lebih tinggi dari pertumbuhan ekonomi (PDB) pada periode yang sama sebesar 4,79%. Pada periode Januari-Desember 2015, nilai ekspor produk industri pengolahan nonmigas mencapai USD 106,63 Milyar, dan nilai impor mencapai USD 108,95 milyar, sehingga neraca perdagangan industri pengolahan nonmigas pada periode yang sama sebesar USD 2,32 milyar (neraca defisit).

Usaha pemerintah untuk memperkecil defisit di atas, salah satunya dengan cara memberdayakan Industri Kecil dan Menengah (IKM) yang merupakan bagian penting dalam perkembangan industri nasional. Sampai saat ini, Industri Kecil dan Menengah

telah berkontribusi sebesar 34,82% terhadap pertumbuhan industri pengolahan nonmigas secara keseluruhan.

Angka ini dapat tercapai karena dukungan lebih kurang 3,6 juta unit usaha, yang merupakan 90 persen dari total unit usaha insutri nasional. Jumlah unit usaha tersebut telah mampu menyerap tenaga kerja sebesar 8,7 juta orang, yang tentunya berdampak pada meningkatnya ekonomi nasional serta mengurangi kemiskinan.

Industri Kecil dan Menengah (IKM) memiliki peran yang strategis dalam perekonomian nasional. Hal ini sejalan dengan Visi Pemerintah dalam Rencana Pembangunan Nasional Jangka Menengah (RPJMN) 2015-2019 yaitu *“Terwujudnya Indonesia yang berdaulat, mandiri, dan berkepribadian berlandaskan gotong royong”*.

Untuk lebih meningkatkan peran tersebut, Penumbuhan dan Pengembangan Industri Kecil dan Menengah diarahkan untuk memiliki tujuan jangka menengah guna mewujudkan industri kecil dan industri menengah yang berdaya saing, berperan signifikan dalam penguatan struktur industri nasional, pengentasan kemiskinan dan perluasan kesempatan kerja, serta menghasilkan barang dan/atau jasa Industri untuk keperluan ekspor.

Hadirin dan Saudara-saudara sekalian,

Awal tahun ini, kita telah memasuki era Masyarakat Ekonomi ASEAN (MEA). Dengan demikian, perekonomian nasional akan langsung bersaing dengan para pelaku pasar di kawasan ASEAN. Produk dan jasa termasuk investasi negara-negara anggota telas bebas memasuki pasar di kawasan ASEAN.

Dalam rangka menghadapi hal tersebut, Pemerintah mengambil langkah-langkah strategis berupa peningkatan daya saing industri dan mendorong investasi di sektor industri; di mana peningkatan daya saing industri itu sendiri dilakukan melalui penguatan struktur industri dengan melengkapi struktur industri yang masih kosong serta menyiapkan strategi ofensif dan defensif dalam akses pasar.

Pemerintah telah melakukan Penguatan Sektor IKM dengan strategi ofensif dan defensifnya melalui beberapa program pelaksanaan, diantaranya antara lain: Penumbuhan Wirausaha Baru; Pengembangan IKM melalui Pengembangan Produk IKM serta Peningkatan Kemampuan Sentra dan UPT; Pemberian Bantuan Mesin dan Peralatan Produksi; Perluasan Akses Pasar melalui Promosi dan Pameran; Fasilitasi Pendaftaran Hak Kekayaan Intelektual; Fasilitasi Sertifikasi Mutu Produk dan Kemasan; serta Fasilitasi Pembiayaan melalui Skema Kredit Usaha Rakyat (KUR).

Saya berharap agar berbagai program-program pemerintah tersebut dapat didukung secara sinergis oleh seluruh komponen masyarakat. Untuk itu, Saya berpesan kepada Saudara-saudara sekalian agar semua program pemerintah dalam bidang

Industri, khususnya dalam program pemberdayaan Industri Kecil dan Menengah, didukung dengan sepenuh hati, agar dapat lebih bermanfaat bagi masyarakat dalam rangka pengembangan industri kecil menengah.

Hadirin dan Saudara-saudara sekalian yang Saya hormati,

Demikian beberapa hal yang dapat Saya sampaikan. Akhirnya dengan memohon ridho Allah Subhanahu Wata'ala, seraya mengucap "*Bismilahirrahmanirrahim*", **Konferensi Internasional "Agribusiness Development For Human Welfare"** dengan ini secara resmi Saya nyatakan dibuka. Semoga Allah SWT memberikan petunjuk, bimbingan, perlindungan dan kemudahan dalam setiap langkah dan upaya kita. Amien.

Sekian dan terima kasih.

Wassalamu'alaikum Wr. Wb.

Yogyakarta, 14 Mei 2016
GUBERNUR
DAERAH ISTIMEWA YOGYAKARTA



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MARKET STRUCTURE AND ANALYSIS OF SEA FISH MARKETING AT DISTRICT OF JEMBER

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Abstract

Fisherman at District of Jember had not been enjoyed profit yet because there was restrictiveness to access market opportunities, such as low productivity, low quality of product, low price and low support from corporate world. This study purposed: (1) to determine market structure of sea fish; (2) to know performance of marketing channel and to analyze marketing margins of sea fish at Jember. In order to achieve those puposes, we used quantitative and qualitative descriptive through survey techniques, accidental and snowballing sampling according to the type of population being sampled. There were two types of population in this study, they were fisherman and marketing agencies which were involved. Data collected by Indepth interviews and observation techniques and analyzed by descriptive analysis, marketing margins and elasticity of transmission price. The results were: 1) The market structure of sea fish at Jember lead to market Monopolistic Competition (between perfect competition and monopoly); 2) there were five pattern of marketing channel of sea fish at Jember and all were running inefficiently because of elasticity of transmission price was less than one; and 3) Marketing margin of sea fish at Jember reached Rp 14,550, - per kg, which share of marketing costs only 10.96%, share of marketing profit reached 61.79% and share of margin which was received by fisherman 27.25% (<50%), it meaned marketing of sea fish in study area run inefficiently.

Keywords: market structure, marketing margin, and elasticity of price transmission

INTRODUCTION

The phenomenon of rising trend on economic business development at fisheries centers in Indonesia seems have not occurred yet at District of Jember. This is related to the limited fishing access to market opportunities, so fisherman have not much enjoyed profit yet. It because the amount of captured fish still low, quality standards have not been fulfilled yet, price of fish are low and less support from the corpotrare world. The next implication is market structuredoes not stand up to fisherman and last consumer because marketing channel of sea fish at Jember has high enough marketing margin (Department of Animal Husbandry, Fisheries and Marine at District of Jember, 2015). The existence of fish auction place as wholeseller market which is expected to be a center of fish trade is less than optimall functioning.

Pengambek as a financier (skipper) and also middle trader has dominant role that disservice fisherman. Pengambek could organize distribution of fish by elongating marketing chain through collaboration with marketing agency of central region of sea fish at outside of the district even province. The logical consequence are the selling price of sea fish is very disproportionate compared with the high operational costs and high risks of work at the sea to catch fish.

Research results of Suwandi (2014) in fish auction place at Sub District of Puger, Jember revealed that government role on that instution was not categorized as a very good program or superior on increasing sea fish sales. Moreover, the role of pengambek was very strong which could concentrate more than 70% of captured fish and distributed them to large marketing agencies including exporters, there was even an attempt to integrate vertically. The weak role of government

could be indicated by low selling price at fisherman level and the high price at last consumer. This means that sea fish marketing in Jember still can not satisfy last consumer, because of the relatively high marketing margin.

Based on the above phenomenon, the objectives of this study were as follows: 1) Determining market structure of sea fish at District of Jember, 2) Determining performance of marketing channel of sea fish at District of Jember, and 3) Analyzing marketing margin of sea fish at District of Jember.

METHODS

Method, Time and Location of Research

This was descriptive research using survey and continuity descriptive method by panel, accidental and snowballing sampling technique (Nazir, 1985). Research was started at Sub District of Puger Kencong, Gumukmas, Ambulu and Tempurejo as regions of sea fish at District of Jember, continued at traditional main market named Pasar Tanjung and then market at District of Ambulu, Jenggawah, Ajung, Pa-trang, Kaliwates, Summersari until retailer.

Sources, Types and Data Collection Techniques

Based on the source, data in this research included primary and secondary data. Primary data were obtained from the fisherman, traders (marketing institution), last consumer and businessmen at the fish auction place by combining some several techniques of collecting data included: Focus Groups Discussion, indepth interview and observation. Whereas secondary data collected from some institution related to this research.

Determining Population and Sampling

Population type consisted of six groups, named: 1) Fisherman, 2) Marketing institution, 3) last consumer and 4) related institutions. Sample from population of fisherman and marketing institution were taken by snowballing sampling. Sample from last consumer was taken by continuity descriptively with

panel technique and convenience sampling (Accidental). Meanwhile, sample from related institutions was taken by purposive sampling which authorized respondents represented their institution (Singarimbun and Effendi, 1987).

Analysis of Data

The first and second goal were answered by qualitative descriptive analysis for knowing markets structure and marketing channels of sea fish which were formed in District of Jember (Singarimbun and Effendi, 1987). Furthermore, to answer the third goal about which marketing channels that had the highest level of efficiency, using mathematical analysis with following formula:

$$\text{Marketing Efficiency} = \frac{\text{Marketing Cost}}{\text{Selling Price}} \times 100 \quad (1)$$

The lower the Marketing Efficiency value, the more efficient marketing in the marketing channel. Furthermore, to measure marketing efficiency can also be done by transmission price elasticity analysis approach. Price elasticity of most agricultural commodities at farmer level is lower than at retail level, so transmission price elasticity is smaller than one (George, P.S and G.A.King, 1980 in Masyrofi, 1994). Furthermore, for determining marketing margins (MM) was used marketing margin analysis with following mathematical formula (Masyrofi, 1994):

$$MM = \sum_{i=1}^m \sum_{j=1}^n C_{ij} + \sum \pi_j \dots \dots \dots (2)$$

Description: MM = Marketing margin m; Cij = marketing costs to carry out function at i-th by marketing institution at j-th; πj = received profit by marketing institution at-j-th; m = Number of marketing costs type and n = number of marketing institution.

Furthermore, to determine received share of marketing margin by fisherman can be calculated by formula:

$$SMM = \frac{P_p}{\dots} \times 100\% \dots \dots \dots (3)$$

P_k

Description : SMM = Share of marketing margin (%); P_p = received prices by farmers, traders at i -th and price of each component of marketing costs; and P_k = paid price by the end user.

Based on the statement made by Gultom (1996) in Bisuk Son (2009) that generally business administration system for some agricultural products can be judged efficient when fisherman margin share (fisherman Share) is above 50%.

RESULT AND DISCUSSION

Sea Fish Market Structure

Results of this study revealed that market structure in traditional market of sea fish at District of Jember tended to **monopolistic competition market**. This condition was accordance with Teguh and Muhammad opinion (2010) that monopolistic competition market is basically a market between the two types of extremes market, that are perfect competition and monopoly market. Some indications supported the results of this research included:

Based on market structure concentration aspect, there were 6,170 fisherman, but only 157 fisherman per day in average which was recorded sold fish at traditional market such as auction place (TPI). Meanwhile, average number of traders per day at that market was 307 to serve 539 consumers per day in average.

Based on market structure characteristics, there were product differentiation because every fisherman always got more than one type of fish which was sold fresh and preserved, although in specific seasons almost all fisherman obtain same types, such as only swordfish, squid, anchovies and tuna. According to Teguh and Muhammad (2010), this characteristic was the most important thing to distinguish between monopolistic competition with perfect competition.

Based on barrier aspect, there was relatively easy to enter and exit at sea fish traditional market at Jember. Fisherman sold their fish to traders easily at fish auction place (TPI), so did consumer which was free to enter and

exit, especially most of fisherman had skipper which would buy their fish, but not new traders, except they coordinated the skipper. Faced obstacles was not as heavy as in oligopolies and monopolies competitive market, but was not as easy as in perfect competitive market. Meanwhile, there were almost no fish specialization, but there were some kind of fish which being a specific characteristic such as shrimp, bump (*benggol*), Spanish mackerel (*tengiri*), *sulung*, *galumah*, *selingsing*, *dorang*, *janglus*, snapper (*kakap*), grouper (*kerapu*), *pare*, anchovies (*teri*), tuna and mackerel (*lemuru*).

Fish specialization occurred in three seasons: (a) drought season on January to April was dominated by mackerel, tuna, gerongan, grouper and layur; (b) middle season on May - July was dominated by tuna, snapper, shrimp, anchovies, mackerel, squid and *pare*; (c) harvest season on August to December was dominated by swordfish, snapper, *dorang*, *selingsing*, spanish mackerel, and *kenyar* tuna. Anyway, there was no binding rules for selling fish diversification because basically type of fish that could be caught occurred naturally, depended on fish season where fisherman go fishing. But on processed products, shrimp paste (*teras*) was a special characteristic product of research field known as "Terasi Puger".

Based on information distribution aspect on traditional fish market at Jember, there was information apportionment relatively on institution marketing level but maldistribution at fisherman and last consumer level. That caused selling price was very expensive on last consumer level but very cheap on fisherman level. On the contrary to the firm in perfect competitive market that did not have power to influence the price, the skipper in this markets structure could affect prices, even relatively strong when compared with marketing companies in oligopolies and monopolies market.

Marketing channels

Result of the study revealed that there were five patterns of sea fish

marketing channels at research field as follows: First pattern was: fisherman sold to retailers at fish auction place which would sell straight to last consumer (Fisherman ----- Retailers in fish auction place ----- Last Consumers). Generally, these fisherman had limited and no related with the skipper, so they were free to sell to anyone. Second pattern was: fisherman did not sell to fish auction place, but directly sold to the skipper which had given loan as working capital for fishing to them. Pengembek directly sold to middle traders or retailers around fish auction place, furthermore middle traders distributed to retailers at traditional markets at Jember (Fisherman ----- the skipper ----- middle traders and retailers ---- last consumer). These fisherman were powerless to sell directly to retailers and middle traders, because they were ensnared never ending capital loans. Selling price at the skipper level was lower than market price but they had to, beside fisherman had to pay Rp 500 per kg sold fish to the skipper. Third pattern was relatively similar to second pattern, but without involving the skipper, fisherman directly sold to middle traders at auction place (Fisherman ---- middleman --- retailers ----- Last consumer), it because fisherman did not related or had no cooperation with the skipper. This meant fisherman were free to sell to anyone without depended on pengembek.

Fourth pattern was actually extended third pattern by adding one more market institution. Inter-regional traders distributed to retailers at traditional markets outside of Jember, such as

Banyuwangi, Situbondo, Bondowoso, Lumajang, Pasuruan and Probolinggo (Fisherman ----- Middleman ---- Trader of inter-regional ---- End User). Fifth marketing channel pattern is similar to the pattern relatif fourth, only increased by one more marketing agency that pengembek. (Fisherman ---- collector traders----middle traders ----- inter-regional traders ----Traditional market retailers ---- last consumers). Marketing channels pattern of sea fish in reseach field sistimatically can be presented in Figure 3.1 below.

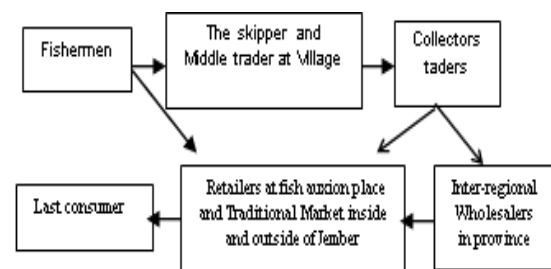


Figure 3.1. Marine Fish Marketing Channels in Jember

Sea Fish Marketing Margin Analysis *Share Margin and Marketing Efficiency*

Share margin discussion would be expalined based on previous formed marketing channels pattern, and so marketing efficiency would to answer hypothesis. Table 1. revealed that first pattern provided share margin 54.42% to fihsermen, it was high enough. It meant that first pattern marketing channel at research field was efficient. This condition was accordance with Gultom (1996) in Putra Bisuk (2009) that generally most of agricultural products were efficient if farmers share margin was higher than 50 %.

Table 1. Sea Fish Marketing Margin Analysis Results of First Pattern Marketing Channel (MC I) at District of Jember 2015

No.	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
1	Price at Fisherman (Pf)	5,000				54.42	
2	Retailers at FAP	5,000	9,188	327	3,861		3.56
3	Share Margin of Marketing (%)				3.56	42.02	
	Marketing Margin (MM)	4,188	Total of Share Margin			100.00	3.56

Source: Processed Primary Data, 2015

Marketing margin of second pattern channel presented in Table 2 showed that marketing margin reached Rp 12,750,- / kg or 72.86% of total price at consumers level. This share margin was very disproportionate because marketing

institution just paid low marketing costs but received high profits, especially the skipper and retailers. Overall in the light of fisherman, 2nd pattern was very inefficient marketing process.

Table 2. Sea Fish Marketing Margin Analysis Results of Second Pattern Marketing Channel (MCII) at District of Jember 2015

No.	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
	Price of Fisherman (Pf)		4,750			27.14	
1	The Skipper	4,750	10,000	416	4,834		4.16
2	Collector taders	10,000	12,500	651	1,849		5.21
3	Retailers at Traditional Markets	12,500	17,500	395	4,605		2.26
	Share Margin of Marketing (%)			8.35		64.50	
	Marketing Margin (MM)	12.750	Total of Share Margin			100.00	3,88

Source: Processed Primary Data, 2015

Marketing efficiency in 3rd marketing channel pattern, was almost same as 2nd pattern (Table 3), but share margin at fisherman level was very low 72% and 71.82% at Tegal. Low share margin at fisherman level in 3rd pattern (27.14%). On the contrary, Pamungkas (2013) revealed that fisherman share margin on marketing of tuna, *layang* and *kembung* respectively reached 79.7 %, was caused by the strong role of skipper

on sea fish distribution. In the light of marketing efficiency, 3 rd pattern had lower average than 2 nd pattern. The highest marketing efficiency was at retailers level and the lowest at collector traders, because marketing cost was highest than other marketing institution. This condition caused fisherman motivation getting weaker and weaker to go fishing.

Table 3. Sea Fish Marketing Margin Analysis Results of Third Pattern Marketing Channel (MC III) at District of Jember 2015

No.	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
Price of Fisherman (Pf)			5,000			27,03	
1	Middleman	5,000	9,500	418	4,083		4.39
2	Collectors	9,500	12,500	651	2,349		5.21
3	Retailers in Traditional Markets	12,500	18,500	400	5,600		2.16
Share Margin of Marketing(%)				7.94	65.04		
Marketing Margin (MM)		13.500	Total of Share Margin		100,00	3,92	

Source: Processed Primary Data, 2015

Table 4 was 4th marketing channels out look, which had marketing efficiency lower than the pattern II and III, so it could be said that sea fish marketing process in this pattern went more inefficient. Although fisherman enjoyed higher prices,

but price changing at consumer level was also higher. It meanted that retailers at this pattern achieve the highest efficiency level, but this condition was just pseudo efficiency because fisherman only received share margin less than 50%.

Table 4. Sea Fish Marketing Margin Analysis Results of Fourth Pattern Marketing Channel (MC IV) at District of Jember 2015

No.	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
Price of Fisherman (Pf)			6,500			32.50	
1	Middle trader	6,500	10,000	418	3,083		4.18
2	Collector trader	10,000	12,000	651	1,349		5.43
3	Traider of Inter-regional	12,000	15,500	785	2,715		5.06
4	Retailers at Traditional Markets	15,500	20,000	415	4,085		2.08
Share Margin of Marketing (%)				11.34	56.16		
Marketing Margin (MM)		13.500	Total of Share Margin		100.00	4.18	

Source: Processed Primary Data, 2015

Marketing channel V pattern which was mentioned in Table 5, showed same performance as pattern IV despite fisherman margin share was lower. In this pattern some fisherman sold fish to middle trader and also to the skipper, it caused fisherman received worse price and last consumers must pay higher, but on the

other side retailers made the most benefit. That condition could be compared with Lopulalan result research (2010) which revealed that fisherman margin share on skipjack (*Katsuwonus pelamis*) marketing on various marketing channels models, both in fish season or not reached more than 50%.

Table 5. Sea Fish Marketing Margin Analysis Results of Fifth Pattern Marketing Channel (MC V) at District of Jember 2015

No.	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
Price of Fisherman (Pf)			6,000			27.27	
1	Middle trader - The Skipper	6,000	10,000	419	3,581		4.19
2	Collector trader	10,000	12,000	651	1,349		5.43
3	Traider of Inter-regional	12,000	16,000	785	3,215		4.91
4	Retailers at Traditional Markets	16,000	22,000	400	5,600		1.82
Share Margin of Marketing(%)				10.25	62.48		
Marketing Margin (MM)		10,500	Total of Share Margin		100.00	4.08	

Source: Processed Primary Data, 2015

Conditions in the study area is quite different when compared with the results of research Pamungkas (2013) on Commodity Chain Analysis Distribution of Marine Fisheries Catch Fish in Tegal. The difference is such that there are three distribution patterns of fish caught, first; fisherman to the traders to wholesaler to retailer to consumer; second, the fisherman to the traders to retailers to consumers; Third, the fisherman to the wholesaler to retailer to consumer. Another difference is that the highest marketing margin on the dominant fish varieties happen to wholesalers by 7.23 percent, 6.75 percent and then retailers,

and traders 6.32 percent of the total catch of fish marketing margins. Table 6 explained that average marketing efficiency of involved marketing institution was 3.98%. This results accepted the hypothesis that sea fish marketing at Jember was inefficient. This fact was supported by result of transmission price elasticity analysis which was only reached 0.46, it meaned marketing was inefficient because less than 1 (Sutarno (2014). On that condition price changing at last consumer level was much higher than at fisherman level.

Table 6. Sea Fish Marketing Margin Analysis Results Based on Marketing Channel Pattern Compilation at District of Jember 2015

No	Type of Sea Fish Marketing Institution	Purchasing price (Rp/kg)	Selling Price (Rp/kg)	Marketing Cost (Rp/kg)	Profit (Rp /kg)	Marketing Share Margin (%)	Marketing efficiency [(Marketing Cost : Sales) x 100%]
1	Fisherman		5,450	500	4,950	27.25	
2	Middle trader-The Skipper	5,450	10,250	419	4,381	24.00	4.09
3	Collector trader	10,250	12,500	687	1,563	11.25	5.49
4	Traider of Inter-regional	12,500	15,500	711	2,289	15.00	4.59
5	Retailers at Traditional Markets	15,500	20,000	350	4,150	22.50	1.75
Marketing Margin (MM) (Rp)		14,550	Transmission Price Elasticity ($\eta = (1/b) \times (Pf/Pr)$)		0.46	100.00	3.98

Description:

b = regression coefficient between Marketing Margin and Retailer Price (Pr)

Source: Processed Primary Data, 2015

CONCLUSION

Formed sea fish market structure at research field was monopolistic competition markets, which was between perfect competition and monopoly competition market.

Formed Sea fish marketing channels at District of Jember consist of five patterns, and the most efficient was channel I (first channel). Generally all kind of marketing channels patterns was inefficient because of the price transmission elasticity reached 0.46 ($\eta = Et < 1$); and

Sea fish marketing margin at District of Jember reached Rp 14,550, - per kg, which marketing cost share was only 10.96% and marketing profits share was 61.79%. Fisherman margin share was

27.25% of price which was paid by last consumer.

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DISCUSSION FROM PARALLEL SESSION

PAPER TITLE	Market Structure and Analysis of Sea Fish Marketing at District of Jember
AUTHOR	Syamsul Hadi, Edy Sutiarto, dan Henik Prayuginingsih
DISCUSSION	
QUESTION	- No Questions
ANSWER	-
SUGGESTION	<ul style="list-style-type: none"> - How do you determine (making conclusion) about market structure of sea fish in Jember? Explain the analistic tool for making conclusion. - Tabel 4, explain more if the result is different



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