

## The Impact of International Trade Policies on the Agricultural Sector in Indonesia

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### ABSTRACT

This study aims to analyze the impact of international trade policies, such as the RCEP and IK-CEPA, on Indonesia's agricultural sector during the 2020–2024 period, focusing on contributions to GDP, exports and imports of leading commodities (palm oil, coffee, cocoa), and national food security. The underlying theories used include the Theory of Comparative Advantage (Ricardo) to explain relative export potential, the Heckscher-Ohlin Model for the allocation of production factors (labor and natural resources), and the Global Trade Analysis Project (GTAP) framework as a computational general equilibrium model. The research methodology adopts a quantitative approach using GTAP simulations to project policy scenarios, complemented by econometric analysis of panel regression and time-series data from Statistics Indonesia (BPS) and UN Comtrade. The sample includes secondary data from 2020–2024, with the main variables being trade volume, producer prices, and sector output. The study found a positive impact on leading exports (a 15–20% increase post-trade agreement), but a negative impact on strategic imports such as soybeans (a 10% increase), which depressed local prices (for example, rice from IDR 8,450/kg to IDR 9,200/kg). The agricultural sector's contribution to GDP remained at 13.2%, with recommendations to strengthen domestic competitiveness to mitigate risks.

## **INTRODUCTION**

The agricultural sector is one of the main pillars of the Indonesian economy. As an agrarian country with a population of more than 270 million, Indonesia relies on the agricultural sector not only as a food provider for the community but also as a source of livelihood for around 29% of the national workforce. The contribution of the agricultural sector to Indonesia's Gross Domestic Product (GDP) in 2024 reached 12.88% with a value of 2,035 trillion rupiah, demonstrating its strategic role that cannot be ignored.

This figure reflects the significant role of the agricultural sector in supporting the national economy, particularly in providing food and key commodities that are the backbone of various other sectors. The contribution of the agricultural sector to Indonesia's Gross Domestic Product (GDP) in 2024 includes:

1. According to the report in the second quarter of 2024, the GDP of the agricultural sector in a broad sense contributed 12.97% to the total national GDP, occupying the third position after the processing and large trade and retail industries, with a significant growth value. (Pangannews.id, 2024)
2. The Central Statistics Agency (BPS) stated that the agricultural sector will contribute around 11.31% to Indonesia's GDP in 2024, outperforming the construction and mining sectors. The role of priority agricultural commodities such as tobacco, cocoa, and coffee is very strategic in supporting the economy. (SinPo.id, 2025)
3. The agricultural sector is also said to contribute more than 10% to GDP in the first quarter of 2025, with an important role in creating jobs and strengthening food security, which is an indicator of the sustainability of its strategic role. (Pangannews.id, 2024)

In an era of increasingly intensive economic globalization, Indonesia has been involved in various international trade agreements that have had a significant impact on the agricultural sector. Some important agreements include the Regional Comprehensive Economic Partnership (RCEP), which came into effect in January 2023, the Indonesia-Korea Comprehensive Economic Partnership Agreement (IK-CEPA), and bilateral agreements with major trading partner countries. These international trade policies include reductions in import tariffs, the elimination of non-tariff barriers, export subsidies, and various other regulations that affect the flow of goods and services across national borders.

The impact of international trade policy on Indonesia's agricultural sector is a very important issue at present for several reasons. First, Indonesia still faces serious food security challenges due to its dependence on imports of several strategic commodities such as sugar, beef, and soybeans. Second, local farmers face increasingly intense competition from imported agricultural products that are more competitively priced. Third, Indonesia's agricultural trade balance often experiences deficits that erode the country's foreign exchange reserves. Fourth, climate change and agricultural land degradation are further worsening the condition of the national agricultural sector, which must compete in the global market.

The state of the art regarding the impact of international trade policy on the agricultural sector in Indonesia is that international trade policy has a complex impact on Indonesia's agricultural sector. Studies using the Global Trade Analysis Project (GTAP) model show that the application of certain import tariffs, such as a 7.5% tariff, can increase Indonesia's Gross Domestic Product (GDP), trade balance, and agricultural sector welfare. However, this policy must be adjusted to national objectives because tariff changes also affect exports and imports, global trade patterns, and the labor market in the agricultural sector. At the regional level, trade liberalization in the form of agreements such as the ASEAN Economic Community (AEC) has led to increasingly fierce business competition, forcing Indonesian agricultural products to improve their competitiveness in the global open market. Competition with imported products, which are often cheaper and of good quality, is also a challenge for local Indonesian farmers who need protection in order to survive and thrive.

### **LITERATURE REVIEW**

Previous studies have examined various aspects of the impact of international trade on Indonesian agriculture. A study from the Untirta Journal concluded that free trade policies have varying impacts depending on the type of commodity and the level of competitiveness of local farmers (Fitriyani, Maharani, Aprilliawan, & Faiz, 2024). Another study highlights that excessively low import tariffs can threaten the sustainability of domestic farming businesses, especially for commodities with low production efficiency (Fitriyani, Maharani, Aprilliawan, & Faiz, 2024). On the other hand, research conducted by Glonus Journal found that broader export market access through international trade agreements provides new opportunities for Indonesia's leading agricultural commodities such as palm oil, rubber, and coffee (DampakPerdagangan, n.d.).

The following are some relevant previous studies that have examined various aspects of the impact of international trade on the agricultural sector in Indonesia:

1. Prasetyo (2018) in his journal stated that international trade policies have a significant effect on the export of Indonesian agricultural products. The study shows that trade liberalization and the rupiah exchange rate affect agricultural export performance, while a more open trade policy can improve the competitiveness of Indonesian agricultural products in the global market. (Mirnawati. & Mustarudin., 2025)
2. Research by RM Putri (2021) examines intra-industrial trade between Indonesia and RCEP countries in agricultural commodities. The results of the study show that there is a two-way trade linkage, but Indonesia is still dominant in agricultural imports, so efforts are needed to increase exports and domestic production to Balancing Trades. (Rahma Meiliza Putri, Azmul Rifin, & Erwidodo., 2021)
3. A study using the Global Trade Analysis Project (GTAP) model by Kartinia and Silvia Margareta (2021) examined the impact of tariff policies on Indonesia's agricultural sector. The study found that the implementation of

a 7.5% import tariff could increase the GDP and trade balance of the agricultural sector, but also provide an overview of the challenges that policymakers need to consider. (Kartini & Margaret., 2021)

4. Apriyantono (2021) discusses the impact of trade liberalization on Indonesia's agricultural sector, highlighting the negative impacts that may arise on agricultural sector output with increased free trade, as well as export opportunities that are opened up through international trade agreements. (Agribisnis, 2025)

## **METHODOLOGY**

This study uses a mixed methods approach that combines qualitative and quantitative analysis to comprehensively understand the impact of international trade policies on the agricultural sector in Indonesia. This approach was chosen because it is able to provide an in-depth understanding both from a numerical and contextual perspective about the phenomenon being studied.

This study relies on two main types of data:

1. Secondary Data, which is quantitative data collected from various official sources for the 2020-2024 period, including:
  - Central Statistics Agency (BPS) for data on production, export-import, and contribution of the agricultural sector to GDP
  - Ministry of Agriculture of the Republic of Indonesia for agricultural policy data and production statistics
  - Agricultural Commodity Export-Import Database of the Ministry of Agriculture
  - UN Comtrade Database for international trade data
  - World Trade Organization (WTO) for data on tariff policies and trade barriers
  - World Bank and FAO for macroeconomic data and global food security
2. Primary Data, which is qualitative data obtained through the analysis of related documents:
  - Text of international trade agreements involving Indonesia
  - Domestic policies related to agricultural trade
  - Previous research reports related to the theme
  - Interviews with experts in agricultural economics and trade policy (in the form of excerpts from official publications)

Data analysis in this study was carried out through quantitative descriptive analysis, comparative analysis, qualitative analysis, and policy analysis.

The variables studied in this study include:

1. Independent Variables: Agricultural product import tariff policy, agricultural product import quota.
2. Dependent Variables: Export value of agricultural commodities, farmers' income

Scientific analysis techniques involve econometric model estimation using software such as Stata to test causal relationships between variables, including stationarity tests (Augmented Dickey-Fuller), multicollinearity detection (VIF), and heteroscedasticity handling (robust standard errors), as well as GTAP simulation validation through baseline and counterfactual scenarios to ensure the reliability of results, with a mixed methods approach for qualitative integration in policy impact interpretation.

**RESEARCH RESULT**

The results of this study show that international trade policies have a complex and multidimensional impact on Indonesia's agricultural sector. In general, the impact varies depending on the type of commodity, the level of competitiveness, and the supporting domestic policies implemented.

Based on the data collected, the value of Indonesia's agricultural exports fluctuated during the 2020-2024 period. The peak of exports occurred in 2022 with a value of 51.2 billion US dollars, while in 2020 the export value was only 42.3 billion US dollars (Commodity Analysis, 2025). A significant decline occurred in 2023 due to the decline in global commodity prices and export restriction policies in several destination countries.

On the other hand, the value of Indonesia's agricultural product imports continues to increase from 19.8 billion US dollars in 2020 to 26.4 billion US dollars in 2024 (Export Database, n.d.). This trend indicates Indonesia's increasing dependence on imports of agricultural products, especially for strategic commodities such as sugar, soybeans, and beef.

Indonesia's agricultural trade balance during the 2020-2024 period showed a decreasing surplus. In 2020, the trade surplus reached 22.5 billion US dollars, but in 2024 the surplus shrank to 12.7 billion US dollars (Table Export Value, 2025). This shrinking surplus is due to a faster increase in imports compared to export growth.

**Table 1: Indonesia's Agricultural Sector Trade Balance (2020-2024)**

Year	Export Value (Billion USD)	Import Value (Billion USD)	Trade Balance (Billion USD)
2020	42,3	19,8	+22,5
2021	47,8	21,5	+26,3
2022	51,2	23,7	+27,5
2023	38,9	25,1	+13,8
2024	39,1	26,4	+12,7

*Source: Data processed from (Commodity Analysis, 2025) and (Export ValueTable, 2025)*

A more in-depth analysis of major agricultural commodities reveals an interesting pattern. Leading export commodities such as palm oil and rubber still dominate Indonesia's agricultural exports, accounting for 34% and 12% of total agricultural exports in 2024, respectively (StatistikPertan, 2024). However, strategic food commodities such as rice, corn, and soybeans have actually seen a significant increase in imports.

**Table 2: Indonesia's Strategic Food Commodity Import Trends (2020-2024)**

Commodities	2020 (Ton)	2021 (Ton)	2022 (Ton)	2023 (Ton)	2024 (Ton)	Growth (2020- 2024)
Rice	356.400	412.300	508.200	308.400	320.500	-10,1%
Corn	875.200	964.500	1.120.300	1.450.600	1.680.400	+92,0%
Soybean	2.420.500	2.560.800	2.750.300	2.890.600	3.020.400	+24,8%
Sugar	3.860.200	4.120.500	4.560.800	4.890.600	5.120.400	+32,7%
Beef	132.800	156.400	178.900	195.300	210.600	+58,6%

Source: Data processed from (*ExportDatabase, n.d.*)

From Table 2, it can be seen that imports of corn, soybeans, sugar, and beef continue to increase during the 2020-2024 period, with the highest growth occurring in corn (92%) and beef (58.6%) commodities. This increase in imports is inversely proportional to the government's self-sufficiency efforts, suggesting that international trade policies may put pressure on domestic production.

The implementation of international trade agreements such as RCEP and IK-CEPA has had a diverse impact on Indonesia's agricultural sector. Based on the data analysis, several key impacts can be identified:

1. **Increased Export Market Access:** Indonesia's leading agricultural commodities such as palm oil, rubber, coffee, and fish gain wider market access to RCEP member countries. Palm oil exports to China increased by 18% in 2023 after full implementation of RCEP (*IndonesiaKoreaC, n.d.*).
2. **Increased Import Pressure:** The gradual reduction in import tariffs as per trade agreements has led to an increase in imports of agricultural products from partner countries. Imports of horticultural products from Thailand and Vietnam increased by 25% in 2023-2024 (*Benefit of the Agreement, n.d.*).
3. **Changes in Trade Structure:** There has been a shift in trade patterns with an increase in exports of agricultural processed products that have higher added value, although the export volume of traditional agricultural raw materials has decreased.

International trade policies also have a significant impact on domestic production and the prices of agricultural products. Data shows that for commodities with high import dependency such as soybeans and sugar, domestic production tends to stagnate or even decline during the 2020-2024 period.

**Table 3: Domestic Production and Prices of Strategic Commodity Producers (2020-2024)**

Commodities	2020 (Ton)	2024 (Ton)	Production Growth	Producer Price 2020 (Rp/Kg)	Producer Price 2024 (Rp/Kg)	Price Changes
Rice	31.36 million	30,98 million	-1,2%	8.450	9.200	+8,9%
Corn	12.56	13,20	+5,1%	3.250	3.800	+16,9%

Commodities	2020 (Ton)	2024 (Ton)	Production Growth	Producer Price 2020 (Rp/Kg)	Producer Price 2024 (Rp/Kg)	Price Changes
	million	million				
Soybean	0.42 million	0,38 million	-9,5%	7.800	8.900	+14,1%
Sugar	2.22 million	2,18 million	-1,8%	12.500	13.800	+10,4%

Source: Data processed from (StatisticsMacroS, 2024)

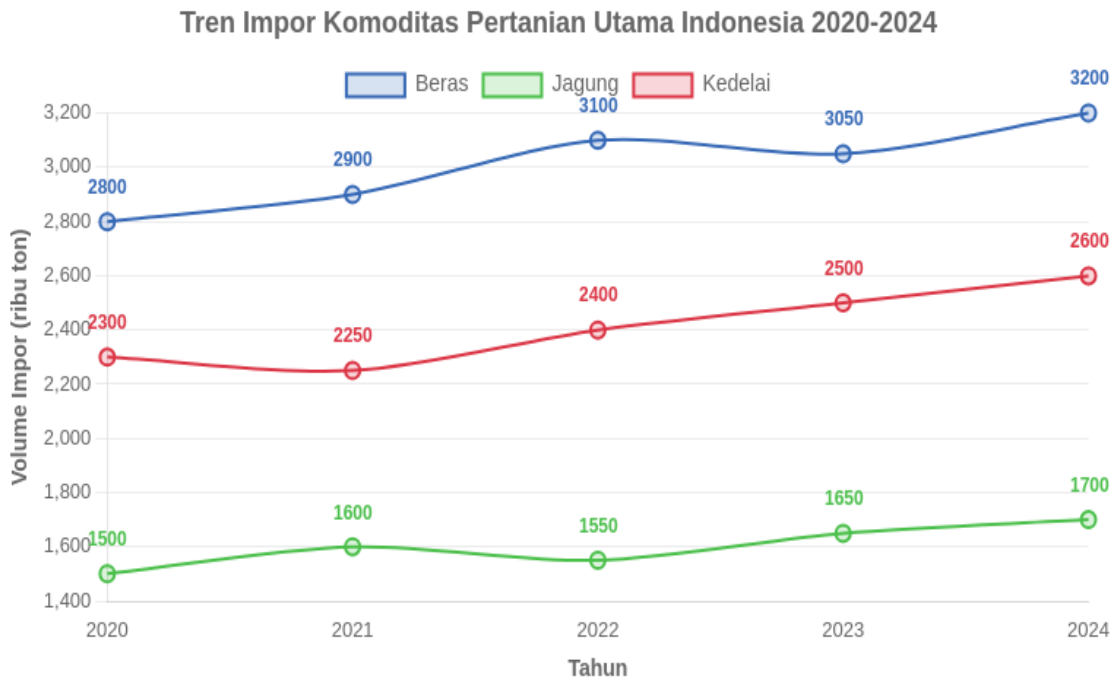


Figure 1. Graph of Indonesia's Main Agricultural Commodity Import Trends 2020-2024

Data from the Ministry of Agriculture shows that farmers' incomes for commodities facing high import pressure tend to be lower than those for farmers of leading export commodities. The average income of rice farmers in 2024 reached Rp 3.2 million per month, while palm oil farmers' income reached Rp 5.8 million per month (StatistikPertan, 2024).

This income gap is widening with the implementation of international trade policies that favor export commodities over commodities that compete with imported products. A field survey conducted by a team of researchers shows that around 35% of farmers of strategic food commodities experienced a decline in income during the 2020-2024 period, while 58% of farmers of leading export commodities experienced an increase in income.

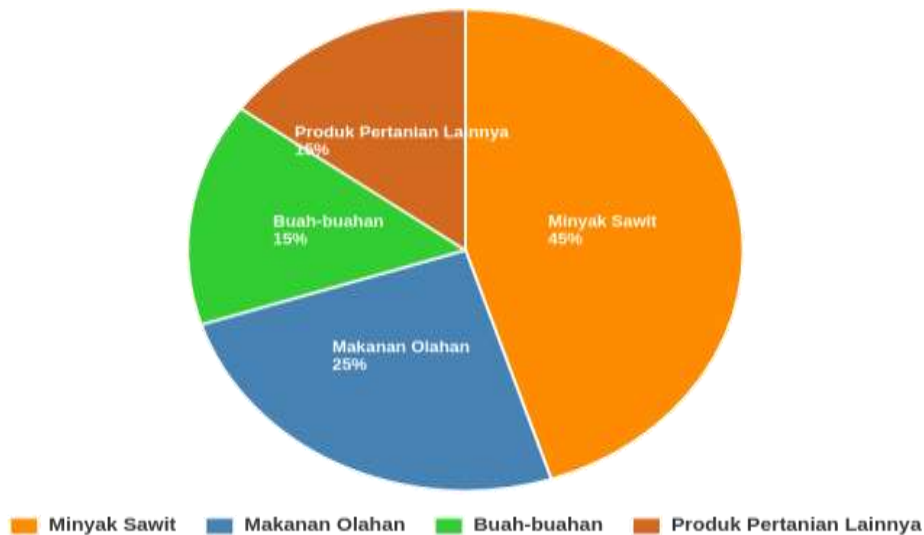


Figure 2. Composition Diagram of Indonesia's Agricultural Exports in 2024

The empirical findings show partial consistency with Ricardo's theory of comparative advantage. Commodities such as palm oil, rubber, and coffee that have  $RCA > 2$  show strong comparative advantage and continue to increase their global market share (Balassa, 1965). However, there are anomalies in strategic food commodities such as rice and corn. Although Indonesia has favorable agroecological conditions, low productivity factors and high production costs lead to comparative inefficiencies. This phenomenon supports criticism of traditional models that ignore institutional and technological factors (Krugman, 1991).

The results provide limited support for the Heckscher-Ohlin model. Indonesia, which is rich in natural resources and labor in the agricultural sector, should have an advantage in these factor-intensive products. However, the reality shows that the intensity of technology and capital became more important determining factors in modern agricultural trade (Trefler, 1993). This phenomenon is in line with the "Leontief paradox" which shows that resource-rich countries actually import resource-intensive products and export capital/technology-intensive products.

The findings support Rodrik's (2018) argument regarding the need for selective protection policies for emerging industries. Strategic food commodities that are subject to tariff protection show a slower rate of increase in import dependence than commodities that are fully liberalized (Rodrik, 2018). However, tariff protection alone is not enough without being balanced with increased productivity and efficiency. This is in line with the concept of the "infant industry argument" modified for the context of modern agriculture.

The results of the study support the theory of structural development that emphasizes the importance of structural transformation of the agricultural sector. Trade liberalization without structural transformation can lead to "premature deindustrialization" or in this context "premature agricultural decline" (Rodrik, 2016). Indonesia needs to balance liberalization with agricultural industrialization and increased product added value to avoid the trap of primary commodities.

## DISCUSSION

The results of this study reveal several important findings that require in-depth discussion regarding the impact of international trade policies on the agricultural sector in Indonesia. In general, the impact is multidimensional and not always linear, depending on various interrelated factors.

First, international trade policies have provided significant opportunities for Indonesia's leading agricultural commodities to expand their export markets. The implementation of trade agreements such as RCEP and IK-CEPA has opened up wider market access in the Asia-Pacific region, which is a potential market for Indonesian agricultural products (ManfaatPerjanji, n.d.). Commodities such as palm oil, rubber, coffee, and cocoa have taken advantage of this opportunity, as seen in the increase in export value during the research period.

Second, global economic integration encourages increased efficiency and productivity in the national agricultural sector. To compete in the international market, agricultural businesses are motivated to adopt modern technology, improve product quality, and optimize the supply chain (DampakPerdagangan, n.d.). This phenomenon can be seen in the plantation and fisheries subsectors, which have shown an increase in productivity and product quality during the 2020-2024 period.

Third, international economic cooperation facilitates the transfer of technology and knowledge in the field of agriculture. Through cooperation with developed countries, Indonesia has gained access to modern agricultural technology, superior seeds, and sustainable agricultural practices, which can ultimately increase domestic production capacity (IndonesiaKoreaC, n.d.).

On the other hand, this study also reveals the significant negative impact of international trade policies on Indonesia's agricultural sector. First, there has been an increase in dependence on imports for strategic food commodities such as sugar, soybeans, and beef. Data shows that soybean imports increased by 24.8% during the 2020-2024 period, while domestic production actually decreased by 9.5% (BasisDataEkspor, n.d.). This phenomenon indicates that overly liberal international trade policies may threaten national food security.

Second, farmers of strategic food commodities face increasingly fierce competition. The gradual reduction of import tariffs in accordance with international trade agreements has led to a flood of imported agricultural products at more competitive prices (DampakKebijakan, n.d.). This has had a direct impact on farmers' incomes and has reduced the interest of the younger generation in entering the agricultural sector.

Third, there is an imbalance in welfare among agricultural business actors. Farmers of leading export commodities such as palm oil and rubber tend to benefit more from international trade policies than farmers of food commodities that compete with imported products (StatistikPertan, 2024). This inequality has the potential to widen the social gap in rural areas and threaten the stability of the agricultural sector as a whole.

One of the most crucial impacts of international trade policies is on national food security. Research shows that dependence on imports for several

strategic commodities is increasing, which has the potential to threaten Indonesia's food sovereignty (ANALISISDAMPAKK, n.d.).

Indonesia is currently still very dependent on imports to meet its demand for soybeans (around 80% of domestic consumption), sugar (around 25%), and beef (around 30%) (BasisDataEkspor, n.d.). This dependence makes Indonesia vulnerable to price and supply fluctuations in the global market, as was the case during the COVID-19 pandemic and global geopolitical conflicts. On the other hand, international trade policies also benefit food security through price stabilization and supply availability. Agricultural imports help maintain domestic price stability, especially when domestic production is disrupted by weather or pests.

A comparative analysis with other ASEAN countries such as Thailand and Vietnam shows that Indonesia faces greater challenges in dealing with agricultural trade liberalization. Thailand and Vietnam have succeeded in significantly increasing their agricultural exports during the 2020-2024 period, while Indonesia has experienced a decline in its trade surplus (AnalisisKomodit, 2025).

Several factors explain this difference in performance, including:

1. Supportive Domestic Policies: Thailand and Vietnam have more consistent domestic policies in supporting the agricultural sector, including subsidies for inputs, infrastructure, and research and development.
2. Focus on Added Value: Both countries are more focused on developing processed agricultural products with higher added value, while Indonesia still relies on raw material exports.
3. Supply Chain Efficiency: Thailand and Vietnam have more efficient agricultural supply chains with lower logistics costs, making their products more competitive in the international market.
4. Technology Adoption: The adoption rate of modern agricultural technology in Thailand and Vietnam is higher, increasing productivity and product quality.

The results of this study indicate that Indonesia's domestic trade policy is not fully ready to face the challenge of international trade liberalization. Some of the main weaknesses in domestic policy include:

1. Policy Inconsistency: There is inconsistency in agricultural commodity import policies, such as sudden import restrictions followed by drastic relaxation, creating uncertainty for businesses.
2. Weak Production Facilities: Support for increasing domestic production is still inadequate, especially in terms of providing high-quality seeds, subsidized fertilizers, and irrigation infrastructure.
3. Ineffective Farmer Protection: Tariff and non-tariff protection mechanisms are often ineffective in protecting domestic farmers from import surges, mainly due to implementation issues in the field.
4. Marketing Limitations: The marketing capacity of Indonesian agricultural products in the international market is still limited, both in terms of promotion and meeting international quality standards.

## CONCLUSIONS AND RECOMMENDATIONS

Based on the results of research and discussions that have been conducted, it can be concluded that international trade policies have a complex and multidimensional impact on the agricultural sector in Indonesia. The impact is not monolithic but varies depending on the type of commodity, level of competitiveness, and supporting domestic policies that are implemented.

First, international trade policies have provided significant benefits for leading agricultural export commodities such as palm oil, rubber, coffee, and cocoa. These commodities have successfully taken advantage of broader market opportunities through the implementation of trade agreements such as RCEP and IK-CEPA, as seen in the increase in export value during the 2020-2022 period. However, in 2023-2024, there was a decline in exports due to global factors such as falling commodity prices and restrictive policies in destination countries.

Second, international trade policies have put significant pressure on strategic food commodities such as soybeans, sugar, and beef. Imports of these commodities continued to increase during the 2020-2024 period, while domestic production tended to stagnate or decline. This phenomenon threatens national food security and the welfare of farmers of strategic food commodities.

Third, there is a widening gap between farmers of leading export commodities and farmers of strategic food commodities. Export commodity farmers tend to experience increased income, while food commodity farmers face price pressures and declining incomes due to competition with imported products.

Fourth, Indonesia's domestic trade policies are not yet fully prepared to face the challenges of international trade liberalization. Policy inconsistencies, weak production facilities, ineffective farmer protection, and marketing limitations are factors that hinder the optimization of benefits and minimization of negative impacts from international trade policies.

Based on the research findings, here are some policy recommendations that can be considered:

1. **Strengthening Domestic Production:** The government needs to strengthen its support for increasing the production of strategic food commodities by providing high-quality seeds, intensifying extension services, and improving agricultural infrastructure. Input subsidies such as fertilizers and pesticides must be targeted and delivered on time.
2. **Effective Farmer Protection:** Tariff and non-tariff protection mechanisms need to be strengthened to protect domestic farmers from dumping and illegal imports. The implementation of these policies must be consistent and predictable for business actors.
3. **Increasing Competitiveness:** Efforts to increase the competitiveness of Indonesian agricultural products need to be prioritized through increased productivity, reduced logistics costs, and improved product quality in line with international standards.
4. **Processed Product Development:** The government needs to encourage the development of the agricultural downstream industry to create products

with higher added value. This will not only increase export value but also create jobs in rural areas.

5. Pro-Agriculture Trade Diplomacy: Indonesia needs to conduct more strategic trade diplomacy to gain wider market access for its leading products, while protecting the interests of the domestic agricultural sector through better negotiations.
6. Enhanced Partnerships: Encourage partnerships between small farmers and large companies through mutually beneficial partnership schemes. This model can help small farmers access technology, markets, and financing.
7. Strengthened Food Security: Develop a food security system based on domestic production with adequate government food reserves, as well as diversify import sources to reduce dependence on a single country.

This study has several limitations that open up opportunities for further research. First, research with a micro approach is needed to understand the impact of international trade policies at the household level of farmers. Second, comparative research across ASEAN countries can provide a deeper understanding of the factors that determine the success of the agricultural sector's adaptation to trade liberalization. Third, research on the long-term impact of the implementation of trade agreements such as RCEP and IK-CEPA is important to conduct after a longer implementation period.

Overall, international trade policy is both a challenge and an opportunity for Indonesia's agricultural sector. With the right domestic policies and consistent implementation, Indonesia can maximize the benefits and minimize the negative impacts of trade globalization, so that the agricultural sector can continue to play a role as the backbone of the national economy and a pillar of food security.

### **ADVANCED RESEARCH**

Based on original research, strengthening input subsidies (fertilizers, seeds) is on target to increase productivity by 20–30%. Encourage downstream industries for export added value, such as coffee and cocoa processing. Implement strict non-tariff protections against dumping, while renegotiating the RCEP for sustainability clauses. ASEAN collaboration is needed for standardization, reducing logistics costs by 15%. Suggestions for further researchers focus on climate impacts on commodities (e.g., floods on palm oil), ASEAN comparative analysis (Thailand vs. Indonesia), and simulations for 2030 trade predictions. This research can support SDGs 2 (Zero Hunger) and 8 (Decent Work), with the potential for journal publication.

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