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Marketing Efficiency, Value Distribution, And Producer Bargaining Power Among Forest Farmer Group Enterprises In Eastern Indonesia

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Abstract

Strengthening the economic resilience of communities around conservation areas requires marketing systems that expand market access while ensuring equitable value distribution. This study analysed the marketing systems of micro, small, and medium enterprise (MSME) products managed by Forest Farmer Groups (KTH), identified opportunities and constraints affecting competitiveness, and formulated strategies to strengthen marketing performance in East Manggarai and Ngada Regencies, East Nusa Tenggara, Indonesia. A mixed-methods approach with a descriptive-analytical design was employed. Primary data were collected through structured interviews using a 37-item questionnaire administered to 40 respondents from 10 active KTH groups. The commodities analysed included local food products, traditional woven textiles, and seaweed. Quantitative analysis covered marketing channels, margins, farmer's share, marketing costs, and efficiency, while qualitative analysis examined pricing, institutional arrangements, promotion, business constraints, and strategic factors using SWOT analysis. Results showed substantial differences in marketing performance. Local food products achieved the highest average farmer's share (85.8%), followed by woven textiles (64.3%) and seaweed (52.8%). Higher shares for food products were associated with direct-to-consumer channels, whereas woven-textile and seaweed producers remained dependent on intermediaries. None of the groups had formal written contracts with buyers, certification remained limited, and social media use was low. The study concludes that stronger marketing performance requires shorter supply chains, cost-based pricing, product standardisation and certification, digital marketing, collective marketing institutions, and direct partnerships with premium buyers and processors.

1. Pendahuluan

Micro, small, and medium enterprises (MSMEs) constitute an important component of the Indonesian economy because of their contribution to employment creation, income distribution, entrepreneurship, and locally based economic development. In rural areas, particularly among communities living near forests and conservation landscapes, MSME development has an additional strategic dimension because it can integrate local economic improvement with the sustainable management of natural resources.

One community-based institution with an important role in this context is the Forest Farmer Group, locally known as *Kelompok Tani Hutan* (KTH). Forest Farmer Groups are community institutions established on the basis of shared interests, socioeconomic conditions, resources, and objectives related to forest-resource management and utilisation. They function as learning platforms, mechanisms for cooperation, and production units that may be further developed into community-based economic institutions (Wulansari et al., 2022).

From a local-development perspective, KTHs can contribute to employment generation, commodity value addition, collective-enterprise development, and the strengthening of sustainable natural-resource management practices (Alimuna & Srifitriani, 2022; Agustina et al., 2024).

The East Nusa Tenggara Natural Resources Conservation Agency (*Balai Besar Konservasi Sumber Daya Alam Nusa Tenggara Timur*—BB KSDA NTT), through the In-Flores Programme, has facilitated a number of Forest Farmer Groups in East Manggarai and Ngada Regencies. The intervention has not focused exclusively on conservation, but has also supported community-based economic activities that utilise locally available resources. Products developed by the groups include processed foods, traditional woven textiles, seaweed, horticultural products, souvenirs, and tourism-related services.

However, improvements in production capacity have not always been accompanied by equally strong marketing systems. Several KTHs continue to face limited market access, strong dependence on intermediary traders, inadequate access to price information, low utilisation of digital-marketing technologies, limited product certification and standardisation, and weak institutional relationships with buyers.

These constraints are economically significant because increased production does not automatically increase producer income when a substantial share of the value created along the marketing chain is captured by intermediaries rather than producers.

Marketing systems in agricultural and community-based enterprises consist of interconnected activities linking producers to consumers through exchange, physical distribution, storage, processing, information, financing, and value creation. Their performance can be evaluated through several indicators, including marketing channels, marketing margins, farmer's share, and marketing costs.

Shorter marketing channels can potentially reduce transaction costs and enable producers to retain a greater proportion of the final consumer price (Panjaitan et al., 2023; Wandira et al., 2025).

One useful measure for evaluating value distribution is **farmer's share**, which represents the proportion of the final consumer price received by the producer. It can be expressed as:

$$FS = P_f / P_r \times 100\%$$

where (P_f) represents the price received by the producer and (P_r) represents the final consumer price.

A higher farmer's share indicates that a greater proportion of the consumer price is retained by producers. Conversely, a lower value may reflect longer marketing chains, relatively large intermediary margins, weak producer bargaining power, or combinations of these factors (Yunita et al., 2021).

Nevertheless, marketing performance in community-based MSMEs cannot be understood solely through price-related indicators. Organisational capacity, continuity of production, product quality, information access, transportation, promotion, market networks, business legality, and contractual relationships also affect competitiveness.

Strong group institutions may improve collective marketing, reduce transaction costs, expand market access, and enhance producers' bargaining position (Laga & Sari, 2022).

The issue is especially relevant in community enterprises located around conservation areas. The sustainability of livelihood interventions depends not simply on whether products can be produced, but on whether those products can be sold consistently and profitably in ways that retain value within producer communities.

Accordingly, this study aimed to: 1). analyse the marketing systems of MSME products managed by Forest Farmer Groups in East Manggarai and Ngada Regencies based on marketing channels, marketing margins, farmer's share, and marketing efficiency; 2). identify opportunities and constraints affecting product competitiveness; and 3). formulate strategies for strengthening marketing performance that may serve as a basis for future KTH development and assistance.

2. Material and Methods

Research Design

The study employed a mixed-methods approach using a descriptive-analytical design.

The quantitative component was used to analyse producer prices, consumer prices, marketing costs, production volumes, revenues, marketing margins, and farmer's share.

The qualitative component was employed to examine marketing-channel characteristics, price-setting mechanisms, promotional practices, institutional arrangements, business constraints, and internal and external strategic factors.

This combination allowed the study to examine both the numerical performance of marketing systems and the institutional processes that shape that performance.

Study Area and Research Period

The research was conducted among Forest Farmer Groups supported by BB KSDA NTT in East Manggarai and Ngada Regencies, East Nusa Tenggara Province, Indonesia. Field data collection was conducted in March 2026 as part of the In-Flores marketing study.

The research locations included KTHs in Rana Mese and Sambi Rampas in East Manggarai Regency and in Bajawa and Riung in Ngada Regency.

Population and Sample

The study population consisted of 11 Forest Farmer Groups supported by BB KSDA NTT. a total of **40 respondents from 10 active KTHs** were successfully interviewed and included in the analysis.One horticultural KTH, Wanggo Werus, had not yet entered the marketing stage because its activities were still limited to seedling preparation and land cultivation. Consequently, it could not be analysed using marketing-performance indicators.

Data Analysis

Marketing Margin
The marketing margin was calculated as:

$M = P_r - P_f$

where:
(M) = marketing margin,
(P_r) = consumer price, and
(P_f) = producer price.

Farmer's Share
Farmer's share was calculated as:

$FS = P_f / P_r \times 100\%$

where:
(FS) = farmer's share,
(P_r) = consumer price, and
(P_f) = producer price.

Marketing Efficiency

Marketing efficiency was assessed by comparing total marketing costs with the total value of marketed products. A smaller proportion of marketing costs relative to product value indicates a lower marketing-cost burden.
However, as discussed later, this indicator was interpreted alongside marketing margins and farmer's share because low distribution costs do not necessarily imply an equitable distribution of value.

SWOT Analysis

A SWOT framework was used to identify strengths, weaknesses, opportunities, and threats affecting the competitiveness and marketing development of each commodity group (Rangkuti, 2015).

3. Results and Discussion

Marketing of Local Food Products
The local-food category exhibited the most diversified marketing-channel structure.

Several groups sold directly to consumers, while others also used local retail stores and online channels. Weki Ndai had the most diversified marketing system, combining direct sales, local retail, and online marketing. Papa Wiu also employed several marketing channels, whereas Dhia Imus and KPUPR relied more heavily on direct-to-consumer sales.

The average farmer's share for local food products reached **85.8%**, the highest among the three commodity categories.

Dhia Imus and KPUPR recorded farmer's shares of **100%** because they sold directly to consumers without intermediary institutions. For Weki Ndai, the producer price was approximately IDR 55,000, while the retail price was around IDR 65,000, resulting in a farmer's share of approximately **84.6%**. Sahabat Alam Rana Mese sold products at approximately IDR 12,500, compared with a retail price of approximately IDR 18,000, generating a farmer's share of **69.4%**. Papa Wiu retained approximately **75%** of the final consumer price.

These results demonstrate the importance of direct selling in increasing the proportion of product value retained by producers. They are consistent with previous findings indicating that shorter marketing channels tend to produce higher farmer's shares because intermediary margins and transaction layers are reduced (Astiti et al., 2022; Wandira et al., 2025).
However, a high farmer's share does not necessarily imply high profitability.

Weki Ndai, for example, recorded the highest gross revenue within the local-food group but incurred approximately IDR 1,250,000 in marketing costs. Its perceived profitability therefore remained relatively limited. KPUPR also faced a comparatively high marketing-cost burden.

This distinction is analytically important. Direct marketing transfers several marketing functions from intermediaries to producers. Producers may receive a larger share of the consumer price, but they must also bear the costs of packaging, transportation, promotion, customer communication, and product delivery.

Consequently, marketing efficiency should not be evaluated exclusively on the basis of channel length or farmer's share.

Another important constraint in the local-food category concerns product legality and standardisation.

Only two of the five food-processing KTHs had obtained PIRT and/or business identification documentation. This limits their ability to enter formal retail networks, hotels, modern stores, and other markets requiring product-safety, labelling, and business-legality standards.

The competitiveness of local food products therefore requires a dual strategy: maintaining the value-retention advantages of direct selling while simultaneously strengthening product quality, packaging, legality, certification, and access to higher-value markets.

Marketing of Traditional Woven Textiles

The marketing structure for traditional woven textiles differed substantially from that of local food products.

All four KTHs relied on intermediary traders as their primary marketing channel. Only Simu Nai also had access to direct consumer sales.

The average farmer's share for woven textiles was **64.3%**. For Simu Nai, the producer price was approximately IDR 400,000 per textile, compared with a retail price of approximately IDR 700,000. This resulted in a farmer's share of approximately **57.1%**. Ghese Berek, Ratu Kelambu, and Nai Di'a each retained approximately **66.7%** of the final price.

The relatively large difference between producer and consumer prices indicates that a substantial portion of product value is captured downstream. Dependence on intermediary traders is closely linked to producers' limited capacity to determine prices. Differences in bargaining power were visible across groups. Ghese Berek and Nai Di'a had greater capacity to set their own prices and experienced comparatively better business conditions.

In contrast, Simu Nai and Ratu Kelambu relied more strongly on price negotiation with buyers, and in some cases buyers had substantial influence over the final price.

These findings indicate that bargaining power is a critical determinant of value distribution within marketing chains. Where producers have only a limited number of buyers and few alternative channels, they are more likely to become price takers.

Marketing challenges in the woven-textile sector are also associated with weak product identity. Three of the four textile-producing KTHs did not yet have adequate branding and packaging. The use of social media was similarly limited, with Ghese Berek being the only group reported to have begun using TikTok as a promotional channel.

This is a significant missed opportunity. Traditional woven textiles are not homogeneous commodities. Their economic value derives not only from material and labour inputs but also from cultural identity, traditional production techniques, symbolic meanings, and unique motifs.

These cultural attributes can serve as strong sources of product differentiation and may support premium pricing when effectively communicated to consumers.

Marketing strategies for traditional woven textiles should therefore not focus only on increasing production volume.

Priority interventions should include:

- collective branding;
- quality curation;
- documentation of product narratives;
- intellectual-property protection for traditional motifs;
- digital marketing;
- improved photography and catalogues;
- access to tourism markets; and
- direct engagement with premium consumers.

The establishment of a shared gallery, cooperative, or collective marketing institution could also reduce dependence on intermediary traders.

By aggregating products across groups, KTHs could offer larger and more consistent volumes while strengthening their bargaining position with buyers.

Marketing of Seaweed

The seaweed enterprise showed a marketing structure that differed from both local foods and traditional textiles. The group produced approximately 2,000 kg of fresh seaweed and 3,000 kg of dried seaweed per production season. Gross revenue reached approximately IDR 38 million per season, making seaweed one of the highest-value enterprises in nominal sales terms among the groups studied. Despite the relatively high production volume and revenue, the producer's bargaining position remained weak.

The average farmer's share for seaweed was approximately 52.8%, the lowest among the three commodity groups. Fresh seaweed was sold at approximately IDR 4,000 per kilogram, while the estimated consumer price was approximately IDR 8,000 per kilogram. Dried seaweed was sold at approximately IDR 10,000 per kilogram, while the estimated consumer price reached approximately IDR 18,000 per kilogram. These differences suggest substantial downstream value formation after the commodity leaves the producer level.n The main marketing channels consisted of intermediary traders and restaurants or hotels. In many transactions, buyers collected the product directly from the production location. Consequently, producers incurred almost no direct marketing costs. At first glance, this arrangement appears highly efficient because the producer bears little or no distribution cost.

However, the low farmer's share reveals a different dimension of marketing performance. This is one of the most important findings of the study: Low marketing costs do not necessarily imply an equitable or economically advantageous marketing system for producers. Two dimensions of efficiency therefore need to be distinguished.

The first is distribution-cost efficiency, referring to the cost required to move products from producer to buyer. The second is value-distribution efficiency, referring to the proportion of the final product value retained by producers.

Seaweed producers incurred almost no distribution costs but received the lowest share of the final value. This indicates that marketing-cost ratios should not be used as a stand-alone indicator of fairness or producer benefit.

Assessment should combine:

- marketing costs;
- marketing margins;
- farmer's share;
- bargaining power;
- access to market information; and
- availability of alternative buyers.

The seaweed group also lacked product certification, branding, packaging, and promotional activities. Dependence on buyers who travel directly to the production site increases vulnerability when intermediary demand declines or commodity prices fluctuate.

Given its relatively large production volume, the group has sufficient economic potential to establish direct contractual relationships with processors or larger-scale buyers.

Product diversification and downstream processing could also increase value added and reduce dependence on the sale of raw materials.

Comparative Marketing Performance across Commodities

The comparative results reveal substantial differences in marketing performance.

Tabel 1 Comparative Marketing Performance across Commodities

Indicator	Local Food	Traditional Woven Textiles	Seaweed
Average farmer's share	85.8%	64.3%	52.8%
Average marketing cost	IDR 418,400	IDR 20,000	IDR 0
Social-media use	3 of 5 KTHs	1 of 4 KTHs	None
Product certification/business legality	2 of 5 KTHs	None	None
Written buyer contracts	None	None	None
Major issue	Certification and packaging	Dependence on intermediaries	Weak bargaining power

The comparison demonstrates a clear association between marketing-channel structure and farmer's share. Local-food products, which more frequently use direct-selling channels, retain the largest proportion of final consumer value. Traditional woven textiles occupy an intermediate position because the majority of products are still marketed through intermediary traders. Seaweed exhibits the lowest farmer's share despite having the largest production volume among the commodity groups. These findings demonstrate that production volume alone is not a sufficient determinant of producer income.

Market access, channel diversity, pricing capability, access to information, and institutional bargaining arrangements are equally important.

Institutions, Contracts, and Bargaining Power

One of the most important cross-commodity findings was the complete absence of written contracts between the analysed KTHs and their buyers. Commercial relationships were primarily characterised by spot transactions or informal verbal agreements.

This creates several risks. First, producers have no certainty regarding future purchasing volumes. Second, groups lack predictable pricing arrangements or mechanisms for price adjustment. Third, there are no formal guarantees regarding product-quality standards, payment schedules, delivery arrangements, or dispute-resolution mechanisms.

Formal contractual relationships need not initially involve complex legal documents.

Simple memoranda of understanding or supply agreements could establish:

- indicative prices;
- purchasing volumes;
- quality specifications;
- delivery schedules; and
- payment procedures.

Institutional strengthening is also needed to ensure that contractual arrangements operate at group rather than solely individual level. Collective selling can aggregate supply, improve quality consistency, strengthen bargaining power, and distribute marketing costs across members.

Digital Marketing and Product Legality

The utilisation of digital marketing remained limited across all commodity categories. Only three of the five food-processing KTHs and one of the four textile-producing KTHs actively used social media. The seaweed group did not use social media for marketing. This suggests considerable potential for marketing transformation.

Digital platforms can function not only as promotional media but also as tools for:

- product catalogues;
- branding;
- direct consumer communication;

- market-information gathering;
- demand assessment; and
- reducing dependence on local intermediaries.

However, digitalisation should not be treated as a stand-alone intervention. Increasing online visibility without improving production consistency, packaging, quality control, logistics, and legal compliance could generate demand that producers are unable to fulfil.

Product legality is particularly important for processed foods. Entering formal retail channels requires compliance with food-safety, labelling, packaging, and business-registration requirements. Facilitation of NIB, PIRT, halal certification where applicable, packaging standardisation, and good production practices should therefore form part of an integrated competitiveness strategy.

Strategies for Strengthening Marketing Performance

Based on the quantitative results and SWOT synthesis, marketing strengthening can be organised into three strategic phases.

Short-Term Strategy: Strengthening Basic Business Capacity

Immediate priorities should include:

- production-cost calculation;
- cost-based pricing;
- basic financial record keeping;
- good production practices;
- packaging standardisation;
- product photography;
- social-media marketing; and
- product legality.

For textile-producing groups, labour valuation should be explicitly incorporated into pricing calculations so that weaving labour is not systematically undervalued.

Medium-Term Strategy: Collective Marketing Institutions

In the medium term, stronger collective-marketing institutions are required.

The four textile-producing KTHs could establish an association, cooperative, or shared marketing platform responsible for:

- product aggregation;
- quality standardisation;
- joint promotion;
- collective purchasing of inputs;
- catalogue development; and
- price negotiation.

For seaweed, direct partnerships with processors or larger buyers should be developed to create alternative marketing channels. Collective institutions can also facilitate market information sharing and reduce the asymmetry of information between producers and buyers.

Long-Term Strategy: Building a Market Ecosystem

Long-term interventions should aim to build an integrated market ecosystem.

Priority areas include:

- partnerships with the tourism sector;
- stronger digital and transport infrastructure;
- development of value-added products;
- intellectual-property protection for woven-textile motifs;
- integration with tourism markets across Flores;
- stronger market intelligence;
- development of direct premium-market channels; and
- more formal buyer–producer partnerships.

This implies that marketing-strengthening programmes cannot rely solely on one-off marketing training. Interventions must integrate production, institutions, product quality, legality, technology, finance, logistics, market intelligence, and buyer networks.

4. Policy and Managerial Implications

The findings generate several practical implications.

First, programmes supporting Forest Farmer Groups should move beyond production-oriented assistance. Increasing equipment, inputs, or production capacity without strengthening marketing systems may simply increase inventories rather than producer income.

Second, direct-to-consumer channels should be strengthened where feasible because they allow producers to retain a larger proportion of final product value.

Third, collective marketing institutions are particularly important for traditional textile producers and other groups that currently depend heavily on intermediaries.

Fourth, product legality and certification should be treated as market-access instruments rather than merely administrative requirements.

Fifth, marketing-performance evaluation should distinguish between low marketing cost and equitable value distribution. The seaweed case demonstrates that producers can incur almost no marketing costs while still retaining a relatively small proportion of the final value.

Sixth, the tourism economy of Flores represents a potentially important market for local foods, textiles, handicrafts, and other KTH products. Stronger linkages between community enterprises and hotels, restaurants, tourism operators, souvenir outlets, and visitor centres could create higher-value local markets.

Finally, institutional capacity to negotiate contracts, obtain market information, and collectively manage supply should become a major component of future KTH empowerment programmes.

5. Conclusion

The marketing systems of MSME products managed by Forest Farmer Groups in East Manggarai and Ngada Regencies exhibit substantial differences across commodity categories.

Local food products achieved the highest average farmer's share at **85.8%**, largely because direct-to-consumer channels were widely used. Traditional woven textiles recorded an average farmer's share of **64.3%**, but producers remained highly dependent on intermediary traders and several groups had limited control over price determination. Seaweed generated relatively high production volumes and gross revenues but recorded the lowest average farmer's share at approximately **52.8%**, indicating a relatively weak producer bargaining position.

A central finding of this study is that marketing-cost efficiency is not equivalent to value-distribution efficiency. Seaweed producers incurred almost no direct marketing costs because buyers collected products at the production site, yet they retained the smallest proportion of final market value. This finding indicates that marketing performance should be evaluated using a combination of marketing costs, margins, farmer's share, channel structure, bargaining power, and access to alternative buyers. Cross-commodity constraints included the absence of formal written buyer contracts, limited product certification and business legality, weak digital-marketing utilisation, limited alternative marketing channels, and underdeveloped collective marketing institutions.

Accordingly, strategies to strengthen KTH competitiveness should focus on shortening marketing chains, improving cost-based pricing skills, strengthening product standardisation and certification, expanding digital marketing, establishing collective marketing institutions, developing formal buyer relationships, diversifying products, and accessing premium markets directly.

Overall, improving the welfare of Forest Farmer Group members requires more than increasing production volume. The capacity of producers to control marketing functions, retain value added, strengthen economic institutions, access market information, and improve bargaining power ultimately determines the proportion of economic benefits retained within producer communities.

Study Limitations

This study has several limitations.

First, it covered only 10 Forest Farmer Groups that had already entered production and marketing activities. One horticultural group could not be analysed because it remained at the early production stage.

Second, the study employed a cross-sectional design and therefore could not capture seasonal changes in prices, production, and marketing performance.

Third, some consumer-price data were obtained from respondent information and online market searches. Consequently, some marketing-margin and farmer's-share values should be interpreted as indicative rather than as continuously observed transactional values.

Fourth, financial recording practices among several KTHs were not yet systematic. Some revenue and cost data therefore relied partly on respondent estimates.

Future research should employ longitudinal transaction records, compare costs and profits across each marketing institution, and statistically examine relationships among bargaining power, institutional capacity, marketing-channel structure, and net producer income.

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