

ANALYSIS OF PALM OIL PRODUCTION CONDITIONS IN INDONESIA IN 2024

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Abstract

Palm oil is a strategic plantation commodity that serves as a main pillar of the Indonesian economy and supports the achievement of sustainable development goals. Despite Indonesia dominance in the global market, a wide production gap and anomalous non linear relationships persist between economic input factors and actual output across major producing provinces. This study analyzes palm oil production conditions in the ten largest producing provinces in Indonesia in 2024 using the Crisp Set Qualitative Comparative Analysis or csQCA method with TOSMANA software. Four causal conditions are examined including average worker wages, number of workers, domestic investment realization, and non-oil export value. The findings reveal three regional characteristics which are optimal, non-optimal, and contradictory. The optimal cluster includes Central Kalimantan which relies solely on human resource quality as well as North Sumatra which achieves optimal production through a combination of average worker wages, number of workers, and exports. In addition, Riau is also included in this cluster as it possesses all four optimal conditions simultaneously. The non-optimal cluster includes South Sumatra which fails to achieve optimal production despite optimal numbers of workers and investment, South Kalimantan which remains non-optimal despite optimal wages and exports, and East Kalimantan which falls short due to insufficient labor despite three other optimal conditions. A contradictory cluster is identified in Bengkulu, Jambi, West Kalimantan, and West Sumatra which share identical causal configurations yet produce different outcomes. This phenomenon indicates the significant role of structural factors outside the model such as plantation area size and tree age distribution. This study affirms that palm oil production improvement cannot be uniformly applied but must be tailored to the specific condition configurations and structural characteristics of each region.

Keywords: *palm oil production, Qualitative Comparative Analysis, worker wages, domestic investment, non-oil exports*

ANALISIS KONDISI PRODUKSI KELAPA SAWIT DI INDONESIA TAHUN 2024

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Abstrak

Kelapa sawit merupakan komoditas perkebunan strategis yang menjadi pilar utama perekonomian Indonesia sekaligus mendukung pencapaian tujuan pembangunan berkelanjutan. Meskipun Indonesia mendominasi pasar global, terdapat disparitas volume produksi yang lebar serta anomali hubungan non linear antara ketersediaan faktor input ekonomi dengan tingkat output aktual antarprovinsi penghasil utama. Penelitian ini menganalisis kondisi produksi kelapa sawit di sepuluh provinsi penghasil terbesar di Indonesia pada tahun 2024 menggunakan metode Crisp Set Qualitative Comparative Analysis atau csQCA berbantuan perangkat lunak TOSMANA. Empat kondisi kausal yang dianalisis meliputi rata-rata upah pekerja, jumlah pekerja, realisasi investasi Penanaman Modal Dalam Negeri, dan nilai ekspor non-migas. Hasil penelitian menunjukkan tiga karakteristik wilayah yaitu optimal, tidak optimal, dan kontradiktif. Klaster optimal mencakup Kalimantan Tengah yang hanya mengandalkan kualitas sumber daya manusia serta Sumatera Utara yang mencapai produksi optimal melalui kombinasi rata-rata upah pekerja, jumlah pekerja, dan ekspor. Selain itu, Provinsi Riau juga masuk dalam klaster ini karena memiliki seluruh kondisi optimal secara simultan. Klaster tidak optimal mencakup Sumatera Selatan yang gagal mencapai produksi optimal meskipun jumlah pekerja dan investasinya optimal, Kalimantan Selatan yang tetap tidak optimal meskipun upah dan eksportnya optimal, serta Kalimantan Timur yang gagal mencapai target akibat keterbatasan jumlah pekerja meskipun tiga kondisi lainnya optimal. Klaster kontradiktif ditemukan pada Bengkulu, Jambi, Kalimantan Barat, dan Sumatera Barat yang memiliki konfigurasi kondisi identik namun menghasilkan outcome berbeda. Hal ini mengindikasikan peran faktor struktural di luar model seperti luas areal perkebunan dan distribusi umur tanaman. Penelitian ini menegaskan bahwa peningkatan produksi kelapa sawit tidak dapat diseragamkan melainkan harus disesuaikan dengan konfigurasi kondisi dan karakteristik struktural masing masing wilayah.

Kata Kunci: produksi kelapa sawit, *Qualitative Comparative Analysis*, upah pekerja, investasi PMDN, ekspor non-migas