

ANALYSIS OF THE POTENTIAL INCREASE IN DRIED GRATED COCONUT EXPORTS TO POLAND IN 2022-2024

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Volume: 5

Number: 3

Page: 602 - 612

Article History:

Received: 2025-06-08

Revised: 2025-06-29

Accepted: 2025-07-17

Abstract:

Indonesia, as the world's second-largest coconut producer, holds significant potential for exporting desiccated coconut to international markets, particularly Poland. However, Indonesia's market share in Poland remains behind the Philippines, which dominates desiccated coconut imports. The demand for this product in Poland continues to rise, driven by trends in healthy, plant-based food consumption and traditional food processing. This study aims to analyze the potential for increasing Indonesian desiccated coconut exports to Poland and to formulate appropriate strategies to optimize this market during 2022-2024. The research employs qualitative and quantitative methods, analyzing export data within the theoretical frameworks of John Stuart Mill's international trade theory and Porter's Diamond Model of competitive advantage. Findings indicate significant opportunities for export growth through improvements in product quality, diversification of value-added products, and strengthening distribution networks in Poland. Indonesia needs to overcome limitations in modern processing and adopt quality standards aligned with the European Union market. In conclusion, the development of innovative products and adaptive marketing strategies are crucial to enhancing the competitiveness of Indonesian desiccated coconut exports to Poland, supporting sustainable national economic growth.

Keywords: Desiccated Coconut, Export, Poland, Competitive Advantage, International Trade

INTRODUCTION

Export is one of the activities in international relations in the economic field (Moenardy, 2021) One of the export products with a competitive advantage is coconut tree. The coconut tree is a plant with high economic value because every part of it can be actively utilized and used. It is a commodity in high demand on the international market and a driver of international trade. The high concentration of coconut production in Asia and the Pacific region makes it a strategic commodity, including for Indonesia, which is the world's largest coconut producer with a total production reaching 17,051,987.58 (Azhar A et al., 2023). With a coconut plantation area of 3,391,993 hectares, of which 99.09 percent are smallholder plantations, coconut is one of the nation's leading commodities. More than six million farming households in Indonesia depend on this commodity for their livelihoods to drive domestic economic growth.

The Ministry of Trade reported that primary industrial goods and manufactured goods accounted for 81.2% of Indonesia's exports, in line with the Ministry of Agriculture's 2020-2024 strategic plan, which focuses on downstreaming the agricultural industry to increase employment, added value, industrialization, and investment in the real sector (Ministry of Trade of the Republic of Indonesia, 2024). This indicates that Indonesia has the potential to increase exports of coconut products. Coconut trees not only have high and consistent productivity, but are also more resistant to unusual climatic conditions, and are able to produce various derivative products including fresh and dried coconut, dried grated coconut, copra, coconut oil (CPO), coconut oil (VCO), coconut meal



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(Coir), and other processed products, one of which is the primary coconut derivative product, namely dried grated coconut (HS Code 080111) which can be utilized in economic activities (Azhar A et al., 2023).

The economy is crucial to today's society. Therefore, it is no surprise that economic growth is a crucial indicator of a nation's success (Sulasmiyati and Larasati Sarah, 2018). According to Todaro (Silaban and Rejeki, 2020), economic growth measures the extent to which a country's economic activity generates additional income for the public over a given period. International trade is a crucial factor in determining economic growth. According to Tambunan (Mahendra and Kesumajaya, 2015), international trade encompasses both exports and imports. Indonesia is a major exporter to both developed and developing countries. The development of supply chains in recent decades has made the trade of input goods, including semi-finished goods, increasingly important. With the growth of international trade, the World Trade Organization (WTO) emerged, playing a role in regulating and facilitating global trade to ensure fairness and transparency. The goal of exporters is to profit from their activities (Windarto, 2017).

Table 1. List of countries supplying dried grated coconut by Poland (HS Code 080111) from ITC calculation data

Exporters	Imported value in 2022	Imported value in 2023	Imported value in 2024
Philippines	17,521	10,380	14,739
Indonesia	6,151	5,009	6,826
Germany	1,055	1,010	774
Sri Lanka	559	339	674
Netherlands	619	276	151

Poland was chosen as a potential focus for increasing Indonesian desiccated coconut exports based on the Philippines' dominant market share, with a 62.3% share, far surpassing Indonesia's 28.8% share. Meanwhile, other countries, such as Germany, Sri Lanka, and the Netherlands, only accounted for between 0.6% and 3.3%. This high GAP indicates a highly concentrated market dominance in two key countries, the Philippines and Indonesia, with other suppliers playing a relatively minor role. Indonesia, while also a major producer, still lags in terms of direct export volume to Poland and may face challenges in terms of distribution and a more limited marketing network than the Philippines. European countries, such as Germany and the Netherlands, while contributing less to direct imports, play a larger role as distribution and processing hubs for desiccated coconut for the broader European market.

Although Indonesia ranks second as a supplier of desiccated coconut to Poland after the Philippines, the Polish market is experiencing quite challenging dynamics, with Indonesia beginning to lose market share due to the Philippines' dominance as a major importer. Indonesia has a comparative advantage and substantial export capacity, but market development in Poland has not been optimal. It is evident in the stagnant or declining growth of Indonesia's export market share, while the Philippines still dominates the market. This situation reflects both opportunities and challenges for Indonesia to increase its penetration and market share in Poland.

Furthermore, Poland has specific market characteristics, where desiccated coconut is widely used as a raw material in traditional and modern food processing industries, such as the production

of Polish biscuits and desserts. Demand for desiccated coconut in Poland continues to grow, primarily due to its use in the processed food industry, such as the production of traditional Polish sweets like "kokosanki" and "ciastka kokosowe." These products are gaining popularity amidst the growing trend of healthy, plant-based foods in Poland.

This focus on Poland is strategic for identifying potential increases in Indonesian desiccated coconut exports. Market development efforts in Poland can be achieved through improving product quality, diversifying value-added products, and strengthening partnerships with industry players and local distribution networks. It can be concluded that although Indonesian exports to Poland continue to increase annually, Indonesian supply is not yet sufficient to meet the entire demand for desiccated coconut imports in the Polish market.

Framework. The framework for increasing Indonesian desiccated coconut exports to Poland is based on the understanding that coconut is a strategic national commodity with high economic value, with the majority of production coming from smallholder plantations that support the livelihoods of millions of farming households. With Indonesia's position as the world's largest coconut producer and consistent production capacity, the opportunity to increase exports of derivative products such as desiccated coconut is vast. However, the reality in the Polish market shows that Indonesian exports are still suboptimal, reflected in their market share lagging far behind that of the Philippines, the main supplier. At the same time, demand in Poland continues to grow with the development of the processed food industry and the trend towards healthy eating.

The structure for increasing exports must begin with identifying internal factors, including productivity and continuity of raw material supply, product processing capabilities, and readiness to meet quality standards and regulations of destination countries. Furthermore, strengthening the export structure is carried out through diversification of value-added products, innovation in packaging and meeting Polish consumer preferences, and the integration of sustainability certification and international standards into the production process. These efforts must be supported by the development of an effective distribution network, partnerships with food industry players in Poland, and the utilization of distribution centers in European countries such as Germany and the Netherlands to expand market access. Furthermore, it is important to optimize the government's role in facilitating export policies, encouraging downstream coconut industry development, and providing incentives for business actors to improve export quality and volume. Thus, the structure for increasing Indonesian desiccated coconut exports to Poland is an integrated process that includes strengthening production capacity, product diversification, meeting international standards, developing distribution networks, and supporting policies oriented towards sustainable export growth, thereby adding value to the national economy and the welfare of coconut farmers. Production Conditions: Raw materials are abundant, but processing is still traditional (exports of desiccated coconut to Poland from Indonesia).

This research is based on the fact that although Indonesia is the world's largest coconut producer, its contribution to dried grated coconut exports to Poland remains suboptimal. Indonesia's market share reaches only 28.8%, far behind the Philippines' dominant 62.3%. However, the Polish market shows a significant increase in demand for this product, particularly as a raw material for the growing traditional and modern food industries.

To answer these problems, this study aims to identify and formulate export increase strategies through the approach of international trade theory and competitive advantage theory. The international trade theory proposed by John Stuart Mill is used as a supporting theory to explain how differences in needs and specialization between countries drive exports and imports, including, in this case, the high demand from Poland that has not been balanced by optimal supply from



Indonesia. Meanwhile, the competitive advantage theory from Michael Porter through Porter's Diamond model is used as the main analytical framework to identify factors that can support and strengthen the potential for increasing Indonesian dried grated coconut exports. The Porter model is used as the main analytical tool that includes four elements: (1) conditions of production factors such as the availability of raw materials and labor, (2) demand conditions that reflect the needs and preferences of Polish consumers, (3) the existence of supporting industries and logistics networks, and (4) strategies and rivalries, especially in comparing Indonesia's competitiveness with the Philippines.

Thus, this research is based on the phenomenon of Indonesia's market share gap, which still lags behind the Philippines, despite increasing demand in the Polish market. To address this situation, International Trade Theory is used to understand the dynamics of supply and demand, while Porter's Diamond Model of Competitive Advantage serves as the primary framework for formulating a strategy to increase Indonesian desiccated coconut exports to Poland.

This framework is designed to generate applicable strategic recommendations to maximize the potential for increasing Indonesian desiccated coconut exports to the Polish market. With the right strategy, particularly through product innovation and diversification of coconut products, Indonesia is expected to expand its market share and strengthen its contribution to the global coconut product supply chain.

METHODS

Research Design. This research uses a qualitative approach. Qualitative research is an integrative and more conceptual analysis method for finding, identifying, processing, and analyzing documents in order to understand their meaning, significance, and relevance (Bungin, 2003). This study uses a qualitative approach to analyze the phenomenon of Indonesia's suboptimal exports of desiccated coconut to Poland, despite Indonesia being a major producer.

Research Object. The research object of this study is Indonesian desiccated coconut exports to Poland, analyzed from the perspective of potential increases in export volume and value in the 2022–2024 period. This research focuses on desiccated coconut with HS code 080111, which is a coconut derivative product with high economic value and is in increasing demand in the Polish market, particularly as a raw material for the processed food industry.

Data Collection Techniques. The data collection techniques used in this qualitative research were documentation and literature review. This research utilized entirely secondary data without primary data collection, as the focus of the study was on analyzing export trends and improvement strategies based on official documents, statistical data, and previous research findings.

Data Analysis. Data analysis in this study was conducted descriptively and comparatively, utilizing secondary data obtained from reliable sources, such as reports from the Ministry of Trade, the International Trade Center (ITC), and relevant previous research.

Validity. In this study, confirmability testing was applied because, in a qualitative approach, this testing places a significant emphasis on checking the quality and relevance of research findings. Therefore, if research results are approved or accepted by others, the research can be considered objective. Furthermore, confirmability can be enhanced by addressing negative issues that contradict previous research findings. Furthermore, confirmability is also based on the premise that each researcher has their unique perspective in guiding their research (Sugiyono, 2019).

RESULT AND DISCUSSION



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Desiccated Coconut Exports to Poland. In the 2022-2024 period, the dynamics of the desiccated coconut (HS Code 080111) market in Poland present significant opportunities and competitive challenges for Indonesia. As the world's largest coconut producer, Indonesia consistently ranks second as the main supplier to Poland. However, data shows a significant market share gap between Indonesia and the Philippines. The Philippines dominates the market with 62.3%, while Indonesia trails far behind with only 28.8%. Other countries such as Germany, Sri Lanka, and the Netherlands have much smaller market shares, ranging from 0.6% to 3.3%, often acting more as distribution hubs than primary suppliers (ITC, 2024).

Table 2. List of countries supplying dried grated coconut by Poland (HS Code 080111) from ITC calculation data

Exporters	Imported value in 2022	Imported value in 2023	Imported value in 2024
Philippines	17,521	10,380	14,739
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Netherlands	619	276	151

The trade in desiccated coconut between Indonesia and Poland is driven by significant demand from Poland, primarily driven by the needs of the processed food industry and the country's growing trend of healthy, plant-based foods, which cannot be fully met by Polish domestic production. Meanwhile, Indonesia has abundant desiccated coconut production capacity, making it a potential supplier to meet this demand. However, this situation indicates that although Indonesia's export volume to Poland may be increasing year-on-year, its competitive position remains suboptimal and vulnerable. Indonesia's export growth trend is expected to stagnate or decline in the 2022-2024 period. It indicates a serious challenge in expanding distribution networks and increasing the competitiveness of Indonesian products in the Polish market.

Competitive Advantage Analysis Using Porter's Diamond Model. To comprehensively analyze the root causes of Indonesia's suboptimal desiccated coconut exports to Poland, Porter's Diamond Model analytical framework is used as the primary tool. This model allows for systematic identification of potentials and constraints through four key determinants: production factor conditions, demand conditions, related and supporting industries, and company strategy, structure, and competition (Porter, 1990).

In terms of production factors, Indonesia has a comparative advantage in the form of abundant and consistent availability of coconut raw materials, supported by its status as the world's largest coconut producer and extensive smallholder plantations. However, this raw material advantage has not been fully supported by modern and efficient processing. Many production centers still use traditional methods, resulting in inconsistent product quality and falling short of the high standards required by European markets such as Poland. Limited technology adoption and the lack of uniform quality standards are significant obstacles to Indonesia's export competitiveness.

In terms of quality, desiccated coconut that European markets, such as Poland, can accept must meet very specific quality standards. The required export quality for desiccated coconut includes a very low water content (around 3–5%) to prevent damage or mold during shipping, a minimum oil



content of 68%, a bright white appearance without brownish spots, a natural aroma and taste, and freedom from bacterial, fungal, or harmful chemical contamination. In addition, the product must be hygienically processed, meet international food safety standards (such as HACCP, ISO 22000, or organic and Fairtrade certification), and have consistent size and texture controlled by modern machines, not manually or traditionally. Suppose the desiccated coconut is still processed traditionally, or there are quality differences between batches. In that case, the product will have difficulty passing tests in European laboratories and is prone to rejection by importers because it does not meet the demands for high quality, continuity of supply, and food safety as per European Union industry standards (Husainahmad, 2025).

Furthermore, demand in Poland is highly promising, driven by the growing trend of healthy and plant-based food consumption. Desiccated coconut is a key ingredient in the processed food industry and in various popular traditional products, such as "kokosanki" and "ciastka kokosowe." The demand for healthy and plant-based food consumption trends can be seen from data on Polish imports of desiccated coconut (HS Code 080111) from various supplier countries, which showed fluctuating but significant dynamics in the 2022-2024 period. The total value of Polish imports was recorded at \$25,905 in 2022, decreased to \$17,014 in 2023, and then increased again to \$23,164 in 2024 (ITC, 2024). Despite these fluctuations, the persistently high level of imports indicates sustained and significant demand in the Polish market.

However, the characteristics of this market demand very high food safety and quality standards, manifested in strict European Union regulations and mandatory international certification requirements. Indonesian producers do not yet fully understand Polish consumer preferences and expectations due to a lack of in-depth market research. Organic or Fairtrade-certified products are a primary need for Polish middle-class consumers, but this segment is underdeveloped by Indonesian exporters, leaving ample growth opportunities (Ministry of Trade, 2024).

Indonesia's position in related and supporting industries, particularly those impacting exports, is severely hampered by weak logistics infrastructure and international distribution networks. This fundamental weakness not only complicates the efficient distribution of Indonesian products, both in terms of cost, delivery time, and consistency of supply to Poland, but also significantly impacts Indonesia's ability to meet the Polish market's stringent quality and food safety standards. For example, the Indonesian coconut processing industry faces serious limitations in the use of laboratories for product quality and safety testing. Observations at several coconut processing companies indicate that only 30–40% of companies have their laboratory facilities adequate to ensure that product quality meets international standards. The remainder rely heavily on external facilities, which are sometimes suboptimal or delayed. It directly leads to delays and inconsistencies in product testing, ultimately negatively impacting the export competitiveness of Indonesian desiccated coconut products, particularly in markets demanding high standards like Poland.

Furthermore, strategic partnerships with local distributors in destination markets are also suboptimal. As a result, countries like Germany and the Netherlands often serve as distribution hubs for Asian products to Europe, while Indonesia's direct exports to Poland remain suboptimal. It adds layers of costs and time, reducing the efficiency and competitiveness of Indonesian products in the Eastern European market. Indonesia's position in related and supporting industries, particularly those impacting exports, is severely hampered by weak logistics infrastructure and international distribution networks. This fundamental weakness not only complicates the efficient distribution of Indonesian products, both in terms of cost, delivery time, and consistency of supply to Poland, but

also significantly impacts Indonesia's ability to meet stringent quality and food safety standards in the Polish market. (Ministry of Industry of the Republic of Indonesia, 2022).

In determining company strategy, structure, and competition, Indonesia faces strong rivalry from the Philippines. The Philippines has advanced further with product innovation, strong branding, and a solid distribution network in Europe. In contrast, Indonesia's export strategy tends to be oriented towards primary commodities that lack innovation and added value. The lack of new product development and minimal branding activities makes Indonesian products easily replaceable and compete solely on price. To be able to compete and gain market share, Indonesia must move towards a more innovative business strategy, ranging from product development and certification to strengthening brands and business networks in the Polish market. As seen from Polish import data, the Philippines dominates the Polish desiccated coconut market with a market share of approximately 62.3%, while Indonesia only has around 28.8%.

By integrating the analysis of the four main determinants of the Diamond Model in an integrated manner, the roots of the suboptimal export of Indonesian dried grated coconut to Poland can be comprehensively mapped. Indonesia needs to optimize the strength of raw materials with technology and innovation, understand and adapt to changes in market tastes, improve the distribution chain, and strengthen business and branding strategies in order to compete sustainably in the international market.

Key Opportunities and Constraints. Based on Diamond Porter's analysis in the previous chapter, the opportunities and constraints for increasing Indonesian desiccated coconut exports to Poland can be detailed as follows. The opportunity to increase Indonesian desiccated coconut exports to Poland is supported by market demand, which continues to grow year after year. The Polish food and beverage industry is increasingly using desiccated coconut as a primary ingredient for new products and innovative takes on traditional recipes, such as "kokosanki" and "ciastka kokosowe." The trend toward healthy, plant-based foods is also driving increased demand, particularly from young and middle-class consumers seeking natural food alternatives. It not only creates opportunities for Indonesia as one of the world's largest producers but also opens up room for expansion into the higher-value premium and organic market segments. It aligns with the growth of the organic and premium market segments in Poland, where certified products with higher added value tend to be more sought after (Rinaldi, 2024).

Furthermore, these opportunities also stem from a strong supporting industry, in the form of strategic partnerships with distribution players in Poland and other European countries. Support from international certifications such as HACCP, ISO 22000, or European organic certification can increase market confidence and provide added value that strengthens the position of Indonesian products in Polish modern retail. In terms of strategy and rivalry, although the Philippines still dominates the market, this situation is a trigger for Indonesia to increase its competitive advantage through product innovation, quality improvement, branding enhancement, and strengthening its direct distribution network to reduce dependence on other distribution centers (Ministry of Trade, 2024). Furthermore, opportunities for product diversification are also wide open, both in terms of flavor variants, packaging sizes, and derivative products such as ready-to-use grated coconut, coconut cream, and coconut flour.

However, there are a number of significant obstacles that must be overcome. The Philippines' dominance in the Polish market, with a market share of over 60%, poses a major challenge for Indonesia. The Philippines has excelled in product innovation, branding, and consistent supply and quality. In contrast, Indonesian exports tend to be standardized and not fully adapted to the specific

needs of Polish consumers, such as low-sugar, gluten-free, or organic and Fairtrade products (Ministry of Trade, 2024).

Limited processing technology means that the quality of Indonesian desiccated coconut products does not fully meet the high standards set by the European Union. Furthermore, inefficient logistics and distribution infrastructure contribute to high export costs and often suboptimal delivery times. These obstacles are exacerbated by the lack of certification and uniform compliance with international standards in smallholder production centers, hindering the acceptance of Indonesian products in the global market. Limited market research and a lack of in-depth understanding of Polish consumer preferences, which increasingly demand high-quality, organically certified, and sustainably-priced products, are also significant inhibiting factors. Furthermore, the lack of long-term strategic partnerships with importers and distributors in Poland and the weak branding of Indonesian products compared to major competitors further undermine Indonesia's position in the market.

At the production level, the quality of desiccated coconut is also inconsistent, as most production is small- to medium-scale, and the processing technology used is less modern. These challenges cumulatively undermine Indonesia's ability to compete in the desiccated coconut export market, particularly in Poland, where markets and standards increasingly demand superior quality and a consistent supply.

Indonesia's business relations and partnerships with distributor networks in Poland remain limited. The lack of long-term contracts with major importers and limited exposure of Indonesian products in Polish modern retail outlets have resulted in suboptimal market access (Rinaldi, 2024). Furthermore, promotions and branding campaigns for Indonesian products remain incidental and unintegrated, either through digital marketing or active participation in international exhibitions.

Overall, the export opportunities for desiccated coconut to Poland are significant if Indonesia can overcome barriers in innovation, certification, diversification, logistics infrastructure, and strengthening relationships with local distribution and food industry players.

Strategies for Increasing Desiccated Coconut Exports. Based on the identification of key opportunities and constraints outlined previously, several key strategies can be implemented to increase the market share of Indonesian desiccated coconut exports to Poland.

The first crucial strategy is to encourage product innovation. Innovation should focus on developing desiccated coconut variants that meet the needs of the modern food industry and household consumers in Poland. Developing new products with various variants, such as organic, gluten-free, low-sugar, or coconut with specific nutritional content, is crucial, as demand for end-product categories using these raw materials in Poland is showing significant growth. Innova (2025) data on food industry trends in Poland comprehensively indicates a strong shift in consumer preferences toward products that support health, sustainability, and special diets. The data highlights that Polish consumers are increasingly seeking "functional ingredients" in their food and beverage choices, prioritizing "organic, locally sourced, and environmentally friendly" products. Specifically, in the snack category, "reduced sugar and fat, high protein sources, and functional ingredients" are the main health claims consumers seek (INNOVA MARKET INSIGHTS, 2025).

This data directly demonstrates the urgent need for Indonesian desiccated coconut producers to diversify their products. European markets, including Poland, are showing rapid growth in the plant-based product category, which often uses shredded coconut as a raw material. GFI Europe's analysis of Nielsen IQ data reveals that sales of plant-based products in European countries grew by approximately 21% between 2020 and 2022, reaching a record €5.8 billion (Alina YAKYMCHUK, 2023).



cooperation, long-term supply contracts, and focused strategic partnerships. Optimizing the role of Trade Attachés and the Indonesia Trade Promotion Center (ITPC) in European countries is also crucial to support product promotion, open market access, and bridge the interests of Indonesian businesses with Polish trading partners (Karina Nilu Fari, 2020). Furthermore, efforts should be made to develop efficient distribution channels, for example, through direct exports to Poland without relying on other distribution countries. This approach can reduce logistics costs and increase the speed of response to the Polish market demand for Indonesian desiccated coconut products.

With the consistent and integrated implementation of the above strategies, it is hoped that Indonesia's dried grated coconut exports to Poland will increase both in terms of volume and added value, and strengthen Indonesia's position as one of the main players in the dried grated coconut industry in the international market.

CONCLUSION

In the 2022-2024 period, the desiccated coconut market in Poland was dominated by the Philippines with a 62.3% market share, while Indonesia, the world's largest coconut producer, controlled only 28.8% and tended to stagnate. Demand in Poland is high due to the healthy food trend and the coconut-based processing industry, but Indonesia has not yet fully capitalized on this opportunity due to weaknesses in product innovation, quality standards, certification, production technology, and distribution networks. The Philippines excels in innovation, branding, and market share, leaving Indonesia lagging. The main limiting factors are the incompatibility of Indonesian products with high-quality demands and European regulations, as well as inefficient logistics infrastructure and distribution networks. Indonesia's export opportunities remain significant due to the growing market for plant-based and premium organic foods in Europe. However, to capture the potential Polish market, Indonesia needs to accelerate production modernization, improve market research and certification (HACCP, ISO 22000, halal, Fairtrade), strengthen distribution partnerships, and adopt innovative branding strategies to compete and increase the volume and added value of desiccated coconut exports to Poland and the EU market as a whole.

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