

Global Value Chain and International Alliance Strategy: Analysis of Local Cocoa Commodities from West Sulawesi in the International Market

Wandi Abbas* & Zainuddin Losi

Universitas Sulawesi Barat, Jl. Baharuddin Lopa, Majene 91412, Indonesia

Abstract

The lower cost of trade between countries has led to increased trade activities with the Global Value Chains (GVC) scheme and the International Alliance Strategy which have been proven to provide many benefits for countries, including accelerated industrialization, technology transfer, employment absorption, and increased industrial value. Participation in GVC consists of two components, forward and backward participation, which have different characteristics. This study aims to identify the analysis of GVC strategies for primary commodities of West Sulawesi cocoa in the international market. The study was conducted using qualitative methods and international trade theory and the Global Value Chain approach using literature studies and interviews. The location of the study was Polewali Mandar Regency, West Sulawesi, one of the provinces with the largest cocoa production in Indonesia. The results of this study indicate that in the supply chain, collaboration and cooperation are very significant from various stakeholders, both from the government, entrepreneurs in this case Barry Callebaut, Cocoa Horizon, PT Bumi Surya Selaras.

Keywords: Barry Callebaut, Global Value Chain, International Market, PT Bumi Surya Selaras, West Sulawesi Cocoa.

1. Introduction

To build a strong nation-state, it requires the integration of politics and economics so that the state must actively involve itself in regulating the economy to increase national power. Therefore, to maintain a strong economy, the country must establish economic relationships through trade surpluses by limiting imports and boosting exports as much as possible. This relationship can be concluded as a zero-sum game (conflict is not harmonious) (Shandri & Afrizal, 2017). One of the focal points of economic relationships is the agricultural sector, particularly in cocoa commodities.

The agriculture, forestry, and fisheries sectors play a significant role in the economic activities of Indonesia. This can be seen from its contribution to the Gross Domestic Product (GDP), which was quite large at around 12.40% in 2022, ranking third after the manufacturing industry at 18.34% and wholesale and retail trade; motor vehicle and motorcycle repair at 12.85% (BPS, 2024).

One of the subsectors with significant potential is the plantation subsector. The plantation subsector contributed 3.76% to the total GDP in 2022 and 30.30% to the agriculture, forestry, and fisheries sector, making it the largest contributor in that sector. This subsector serves as a supplier of raw materials for the industrial sector, a labor absorber, and a foreign exchange earner. Cocoa is one of the plantation commodities that plays a crucial role in Indonesia's economy. Cocoa is also one of Indonesia's important export commodities that generates foreign exchange for the country, along with oil and gas. According to data from the International Cocoa Organization (ICCO) in 2021/2022, Indonesia ranks as the 7th largest cocoa producer in the world. In addition to expanding export opportunities, the domestic market for cocoa beans is still substantial. The potential market for cocoa beans includes the cocoa processing industry in Java Island.

* Corresponding author.

E-mail address: wandi@unsulbar.ac.id

Indonesia, being located on the equator, offers various benefits due to its geographic location. This location supports the growth of various types of plants, both tropical plants and those with high potential in terms of quality and quantity (Cintia Alifita Riyanisa, 2022). For Indonesia, the cocoa industry is considered an important industry. The International Cocoa Organization (ICCO) mentions that Indonesia is the third-largest cocoa producer globally, contributing 15% of the total global cocoa consumption. Unfortunately, the quality and grade of Indonesian cocoa rank fifth after Ivory Coast, Ghana, Nigeria, and Cameroon. Although the competitiveness of cocoa products is not yet optimal, Indonesia has contributed to the Global Value Chain (GVC). However, this contribution has not been optimal, particularly in terms of the value-added cocoa export products, which remain low (Wijayati, 2022).

The cocoa produced by farmers contributes significantly to the global value chain and is exported to various countries around the world. In fact, the majority of Indonesia's cocoa products are targeted for the global market, with only a small portion sold domestically. The main export markets for Indonesian cocoa include Malaysia, the United States, China, India, and the Netherlands (BPS, 2017:14). The high export value of cocoa indicates that Indonesia's contribution to the global value chain is substantial (Wijayati, 2022).

Indonesia's contribution to the Global Value Chain (GVC) for cocoa products is mostly in the form of semi-processed raw materials, such as cocoa butter, cocoa powder, and other industrial raw materials. These raw materials are sent to cocoa processing industries in importing countries to increase their added value (Shandri & Afrizal, 2017). This shows that Indonesia's role in the global value chain or Global Production Networks (GPN) is still reliant on cocoa processing industries in other countries (Wijayati, 2022). This GVC process can also be seen in Indonesia, particularly in the province of West Sulawesi, where cocoa management plays an important role.

The provincial government of West Sulawesi continues to encourage the increase in cocoa production. This is a commitment from the government regarding the potential of cocoa, which is a regional mainstay. It is targeted that cocoa production in West Sulawesi will reach 140 to 150 thousand tons. In West Sulawesi, cocoa is one of the major agricultural export commodities (Disbun, 2018). The total cocoa plantation area in West Sulawesi in 2018 was 144,971 ha, with a production of 71,787 tons (BPS Sulbar, 2019).

The development program for increasing cocoa production and quality in West Sulawesi continues to be implemented by the provincial and district governments. This program focuses on expanding plantation areas and intensification (rehabilitation and rejuvenation of old cocoa trees). The number of cocoa plantations continues to increase every year. Among the regions in West Sulawesi, Polewali Mandar, Mamuju Tengah, Mamasa, and Mamuju are known for having the best quality and quantity of cocoa.

In terms of GVC management, West Sulawesi has cooperated and partnered with several multinational companies (MNCs) such as Barry Callebaut and Cocoa Horizon Foundation. Barry Callebaut Group, headquartered in Zurich, Switzerland, was formed through a merger in 1996 between the iconic Belgian chocolate maker Callebaut and the French company Cacao Barry. Over the past quarter-century, Barry Callebaut Group has become the world's leading producer of high-quality chocolate and cocoa products, controlling every step of the value chain, from raw material sourcing to the production of the finest chocolate. The company's mission is to become number one in all segments of the customer base, with a fully integrated business model in cocoa origin countries and a unique global footprint.

2. Literature Review

GVC (Global Value Chain) is a concept that describes the series of activities undertaken by companies and workers to increase the added value of a specific product in order to optimally meet the needs of end-use consumption (Gereffi & Stark, 2011). The GVC chain involves research and development, design, production, sales, marketing, consumption, and recycling. The GVC approach refers to the global economic model as a complex network involving suppliers and buyers integrated into multinational companies. In the global economy, GVC becomes an integral part of the economy, forming specific patterns in the production and international trade chains (Wijayati, 2022).

The global value chain is defined as "a fragmented supply chain, with tasks and activities spread internationally, coordinated by lead firms" (UNCTAD, 2013). Typically, GVC studies aim to explore 1) the types of relationships between local firms and lead firms (i.e., GVC governance), and 2) the relationship between GVC governance and types of upgrading. Specifically, upgrading is defined as "making products better, making them more efficient, or moving to higher-skill activities" (Giuliani et al., 2005).

Studies on GVC show that the focus in GVC is more on global buyers than on multinational companies. In other words, the contribution to the GVC refers to efforts made to meet global consumer needs. However, policies related to the development of multinational companies can also enhance the potential role of a country in the GVC. The development of GVC can be implemented through functional upgrading for production business management. For example, local companies actively engage in pre-production activities such as marketing research, options, technology development, and production design, as well as post-production activities such as advertising and marketing. However, in GVC, global companies that dominate the market for certain raw materials generally seek to maintain managerial positions. Local businesses prevent large companies from participating in pre-production and post-production activities. This is because the most valuable activities in the main industry are considered the core of the GVC (Murakami & Otsuka, 2017).

In this regard, GVC becomes a multi-stage structure. At this stage, businesses implement outsourcing at all levels. Head companies set their own standards so they can control the behavior of the chain in the controlled sectors and other chain players (Mayer & Gereffi, 2010). This allows the industry to rely on managers in the field. If large companies are suspended, it will affect the entire global supply chain, which involves other stakeholders in the industry. Global value chains influence several macroeconomic indicators. Macroeconomics presents several challenges because the increase in value creation affects the growth of trade. The impact of global value chains on a country's macroeconomy can be interpreted in three main indicators: the effective exchange rate, export market content, and the elasticity of global trade demand (Giuliani et al., 2005), (Wijayati, 2022).

The theoretical foundation used in this GVC study is expected to be an analytical tool for understanding the patterns of relations produced by GVC in an industry, especially during global crises like the current pandemic. This study is also part of a series of previous GVC studies related to the global competitiveness of Indonesian cocoa products. GVC is an important instrument in analyzing international trade. GVC is also stated to be able to increase added value in the goods and services industry sector. Market openness that facilitates the exchange of goods and services between countries can increase competitiveness and added value of a product owned by a country. Therefore, GVC governance structure should be a critical concern for economic actors in the country (Yunita, 2021).

According to Burhan, in his article on the Role of Government and Private Sector in Improving Cocoa Competitiveness (Global Value Chain Analysis), 2021, he explains that in GVC analysis, the focus is on the added value generated at each link in the chain. Improving the added value at each link will enhance the competitiveness of the product. This enhancement can be done through Upgrading and Governance. Currently, Indonesia is in the third position as the world's largest cocoa producer, with South Sulawesi as the largest producing region, producing high-quality cocoa beans. However, in terms of management, the products produced still have not gained a significant share in the international market. This indicates that the competitiveness of cocoa from Sulawesi is still weak (Burhan & Surani Haliq, 2021).

3. Research Method

This research uses a descriptive-analytical method, which explains the events and facts obtained during the study. In descriptive research, the researcher attempts to describe the strategy related to local commodities in the international market using the Global Value Chain and International Alliance Strategy approaches in West Sulawesi.

This qualitative research process involves essential efforts, such as asking questions and procedures, gathering specific data from participants, and analyzing the data (Creswell, 2014). The type of research used is descriptive research. Descriptive research aims to describe, record, analyze, and interpret current conditions (Moleong, 1989).

To understand the object being studied, the researcher uses qualitative data consisting of primary and secondary data. In obtaining primary data, the researcher conducted face-to-face interviews with sources including cocoa farmers, cocoa entrepreneurs in Polewali Mandar, Barry Callebaut, and the West Sulawesi government. These interviews required open-ended and unstructured questions, designed to elicit views and opinions from the participants (Moleong, 1989).

4. Results and Discussions

4.1. Price Channel of Indonesian Cocoa Industry

In recent years, Indonesia’s cocoa commodity has seen positive development. The government continues to improve various policies to boost cocoa productivity in Indonesia and increase its contribution to the global value chain. This can be seen from the government's efforts to reduce the export of unprocessed cocoa products and encourage the development of cocoa bean processing. These efforts have had a positive impact and strengthened Indonesia’s cocoa industry in the global market. Over the past 25 years, Indonesia’s cocoa sector has made significant progress, with massive growth. One of the strengths of Indonesia’s cocoa industry is the expansion of markets from small farmers. About 90% of Indonesia’s cocoa is produced from cocoa trees managed by farmers, leading to a significant increase in cocoa plantation areas. Indonesia currently has about 1.5 million hectares of cocoa plantations. The largest cocoa-producing region in Indonesia is Sulawesi, contributing about 75% of Indonesia’s total cocoa production (Wijayati, 2022).

Price fluctuations in international cocoa markets also affect the cocoa industry in Indonesia, as the majority of Indonesian cocoa products are targeted for export markets. This means that changes in cocoa product prices in the global market significantly influence Indonesia's GDP derived from the cocoa industry. In 2020, the value of Indonesia's cocoa export GDP decreased to USD 1,198,735, down from the previous year’s USD 1,244,209. This shows how the global pandemic has impacted the performance of the cocoa industry and its contribution to Indonesia’s GDP.

4.2. Supply Chain Channel of Global Cocoa Industry

Indonesia’s cocoa industry is widely integrated into the global value chain. Indonesia contributes to the global cocoa industry through intensive international trade with various countries. Indonesia exports raw cocoa as a primary ingredient for cocoa processing industries in other countries. In this context, international trade is considered a parameter to measure the economic output of a country. International trade influences the contribution to GDP, foreign exchange reserves, and inflation rates on the exchange rate. This condition allows countries to maximize exports and minimize imports by relying on their competitive advantages (Priyono, 2021).

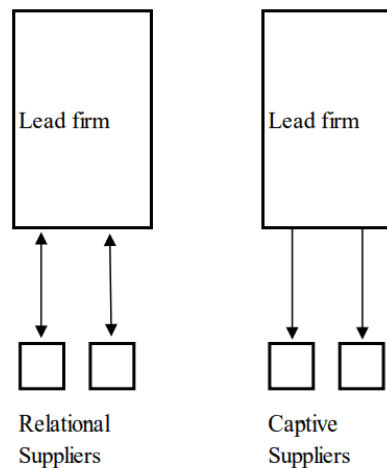


Figure 1. Two Types Of GVC Governance: Captive And Relational Value Chains, (Gereffi et al., 2005), (Murakami & Otsuka, 2017)

For Indonesia, the cocoa industry possesses competitive advantages that are attractive. Cocoa itself is a key raw material for chocolate production and several luxury food products. However, during the global pandemic, the demand for chocolate and its derivatives declined. This decline also affected Ivory Coast and Ghana, the first and second largest global cocoa suppliers (Statista, 2021).

4.3. Financial Channel of the Cocoa Industry

In GVC, there is an increasingly close relationship between raw material prices and global liquidity cycles. This allows for the management of complex macroeconomics in relation to raw materials. In the cocoa industry, global macroeconomics also affects financial channels. Like other agricultural products, Indonesia's cocoa exports have been inconsistent due to various factors. Research has shown that several factors impact agriculture, processing, production, and exports. These factors are linked to products, industries, governments, or exports. Overall, these factors can affect the quantity and quality of Indonesia's cocoa exports each year (Priyono, 2021).

From a financial perspective, Indonesia's cocoa industry companies are also potentially impacted by the global pandemic. An example of this can be seen with one of Indonesia's major cocoa producers, COCO. COCO, a chocolate producer from PT Wahana Interfood Nusantara, experienced financial changes due to the cocoa crisis. The company saw its sales drop by half due to the lockdown measures. This resulted in a 47% year-over-year decrease in revenue, reaching IDR 47.6 billion (USD 3.2 million) in the first half of 2020. A key factor contributing to this decline was the closure of malls, which restricted customer access to COCO's outlets (Alifiaberizky, 2021).

From an export perspective, Indonesia's cocoa export value to global markets also declined. Below is a graph showing the change in the value of Indonesia's cocoa exports, which demonstrates a decrease from 2019 to 2020. However, between 2018 and 2019, there was an increase in export value.

4.4. Global Value Chain in West Sulawesi Cocoa Commodities

The agriculture, forestry, and fisheries sectors play a significant role in Indonesia's economic activities. This can be seen from its contribution to the Gross Domestic Product (GDP), which was substantial at 12.40% in 2022, making it the third-largest contributor after the manufacturing industry at 18.34% and wholesale and retail trade; motor vehicle and motorcycle repair at 12.85% (BPS, 2024).

One of the subsectors with significant potential is the plantation subsector. In 2022, the plantation subsector contributed 3.76% to total GDP and 30.30% to the agriculture, forestry, and fisheries sector, making it the largest contributor in this sector. This subsector serves as a raw material supplier for the industrial sector, a labor absorber, and a foreign exchange earner. Cocoa is one of the plantation commodities that plays a significant role in Indonesia's economy. Cocoa is also one of Indonesia's important export commodities, contributing foreign exchange to the country alongside oil and gas. According to the International Cocoa Organization (ICCO) in 2021/2022, Indonesia ranks 7th as the largest cocoa producer in the world. In addition to increasingly open export opportunities, the domestic market for cocoa beans is still substantial. The potential market for cocoa beans includes the cocoa processing industry in Java Island.

According to the HS classification of cocoa, in 2022, the largest cocoa export volume was Cocoa Butter (HS 18040000) with 153.75 thousand tons, representing about 39.89% of total cocoa exports. This was followed by Cocoa Powder (HS 18050000) with 112.28 thousand tons (29.13%), Cocoa Paste (HS 18032000) with 49.23 thousand tons (12.77%), Cocoa Beans (Not Fermented) (HS 18010090) with 23.38 thousand tons (6.07%), Food Products (HS 18069090) with 11.38 thousand tons (2.95%), and the rest of the HS codes accounted for 32.39 thousand tons (8.4%) (BPS, 2024).

Both the volume and value of cocoa exports have fluctuated over the past five years. In 2018, the export volume was 380,827 tons with a total value of about USD 1.25 billion. In 2019, it decreased to 358,481 tons, valued at around USD 1.20 billion. Export volume continued to rise, reaching 385,421 tons with a total value of about USD 1.26 billion in 2022. However, in 2021, the increase in export volume was not matched by export value, which decreased by 3.01% compared to 2020 (BPS, 2024).

The cocoa produced by farmers contributes significantly to the global value chain and is exported to various countries worldwide. In fact, most of Indonesia's cocoa products are aimed at global markets, with only a small portion marketed domestically. The main markets for Indonesian cocoa products include Malaysia, the United States, China, India, and the Netherlands (BPS, 2018). The high export value of cocoa indicates that Indonesia's cocoa commodity contributes significantly to the global value chain.

The West Sulawesi provincial government continues to encourage an increase in cocoa production, demonstrating the government's commitment to the potential of cocoa as the region's mainstay commodity. It is targeted that cocoa production in West Sulawesi will reach 140 to 150 thousand tons. Cocoa is one of West Sulawesi's major agricultural

export commodities (Disbun, 2018). In 2018, the cocoa plantation area in West Sulawesi covered 144,971 hectares, with a production of 71,787 tons (BPS Sulbar, 2018). The distribution of cocoa plantations in West Sulawesi includes Majene (13,171 ha, 8,128 tons), Polewali Mandar (49,930 ha, 33,259 tons), Mamasa (15,386 ha, 7,743 tons), Mamuju (39,832 ha, 10,452 tons), and Mamuju Utara (12,802 ha, 5,637 tons) (BPS Sulbar, 2019).

The development program to improve cocoa production and quality continues to be implemented by the provincial and district governments in West Sulawesi. This program includes expanding plantation areas and intensifying efforts (rehabilitation and rejuvenation of old cocoa plants). The increase in cocoa production continues every year. Some regions in West Sulawesi, such as Polewali Mandar, Mamuju Tengah, Mamasa, and Mamuju, have the best quality and quantity of cocoa.

In the management of cocoa related to GVC, West Sulawesi has partnered with multinational companies such as Barry Callebaut and the Cocoa Horizon Foundation. Barry Callebaut Group, headquartered in Zurich, Switzerland, was formed by the merger of two iconic chocolate makers, Belgium's Callebaut and France's Cacao Barry, in 1996. Over the past quarter-century, Barry Callebaut has become the world's leading producer of high-quality chocolate and cocoa products, controlling every step of the value chain, from sourcing raw materials to producing the finest chocolate. The company aims to be number one in all customer segments, with a vertically integrated business model and a strong position in cocoa origin countries, alongside a unique global footprint.

4.5. *Barry Callebaut*

Barry Callebaut Group sets innovation standards in the cocoa sector. The company has an annual sales volume of approximately CHF 7.2 billion (EUR 6.6 billion / USD 7.9 billion) in the fiscal year 2020/21. Barry Callebaut is a leading global producer of high-quality chocolate and cocoa products, involved in sourcing and processing cocoa beans to produce the finest chocolates, including fillings, decorations, and flavorings. The group operates more than 60 production facilities worldwide and employs over 13,000 diverse and dedicated workers globally (Barry Callebaut, 2025).

Barry Callebaut serves the entire food industry, from industrial food producers to artisanal and professional chocolate users, such as chocolatiers, pastry chefs, bakers, hotels, restaurants, or caterers. Global brands serving specific customer needs in the gourmet segment include Callebaut®, Cacao Barry®, Carma®, and decoration specialists Mona Lisa®. Barry Callebaut is committed to making sustainable chocolate the norm by 2025 to ensure future cocoa supplies and improve farmers' livelihoods. This supports the Cocoa Horizons Foundation's mission to shape the future of sustainable cocoa and chocolate, especially in West Sulawesi's cocoa sector.

4.6. *Cocoa Horizons*

Cocoa Horizons Foundation is a third-party verified nonprofit organization based in Switzerland, supported by Barry Callebaut. It is an impact-based program with a vision to drive the well-being of cocoa farmers by creating self-reliant communities that protect the environment and children. The foundation supports the Sustainable Development Goals (SDGs) (Cocoa Horizon, 2025).

Cocoa Horizons Foundation enhances its impact and drives change in cocoa farming communities with the help and support of its partners. Cocoa Horizons has made significant progress this year, expanding its program to reach more cocoa farming communities and achieving positive outcomes, including +63% of farmers sending cocoa, +39% of farmers moving out of poverty, 99% of farming groups covered under child protection activities, and the achievement of 168,348 tons of carbon removal. Productivity improvements are helping cocoa farmers become more prosperous (Cocoa Horizon, 2025).

Cocoa Horizons focuses on key supporting factors—crop yield, price, and farm size—that enable higher investments in farming and increased income. These include providing access to planting materials and land management, offering labor services to support fieldwork before harvest, ensuring farmers' knowledge of good agricultural practices through certification and personalized coaching, providing additional premiums to farmers, supporting income diversification, and securing land rights to enable higher agricultural investments. Cocoa Horizons is currently present in Côte d'Ivoire, Ghana, Cameroon, Nigeria, Brazil, Indonesia, and Ecuador.

5. Conclusion

The declining trade costs between countries have led to an increase in trade activities through Global Value Chains (GVC) and international alliance strategies, which have proven to provide many benefits for countries, including accelerated industrialization, technology transfer, labor absorption, and increased added value in industries. Participation in GVC consists of two components: forward participation and backward participation, each with its distinct characteristics. The Cocoa Horizons Foundation has made a significant impact and driven change in cocoa farming communities, expanding its program to reach more cocoa farmers and achieving notable outcomes such as increased cocoa deliveries and reductions in poverty among farmers.

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