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Market Structure And Behavior Analysis Swallow's Nest In Parigi Moutong District Central Sulawesi Province

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Abstract

The swallow nest business in Parigi Moutong Regency has only started to develop in the last ten years. Although still relatively new, this area has become one of the export centers for swallow's nest commodities in Central Sulawesi. This study aims to analyze the structure, behavior, and performance of the swallow's nest market in Parigi Moutong Regency. The method used in this research is quantitative descriptive analysis using survey method. The data taken were primary data through direct interviews with the help of questionnaires and observations. Secondary data were obtained from literature. The results showed that the swallow nest market structure formed at the entrepreneur level is perfect competition. The market structure formed at the level of village traders and large traders is monopolistic. Swallow nest entrepreneurs sell their crops to village traders and large traders. Prices are determined by traders based on quality, quantity, and market conditions. However, entrepreneurs often have limited market information, resulting in a weak bargaining position. Village traders and large traders have better access to market price information, making them the price setters for entrepreneurs. The selling price of swallow's nest varies, with entrepreneurs selling to village traders at around IDR 6,000,000 per kilogram, while large traders offer prices between IDR 8,000,000 and IDR 9,000,000 per kilogram. The marketing function involves entrepreneurs, village traders, and wholesalers, each with a role in distribution and pricing. Marketing channel I, where entrepreneurs sell directly to large traders, provides higher prices than marketing channel II, which involves village traders as intermediaries.

Keywords: **Swallow's Nest, Market Structure, Market Behavior.**

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INTRODUCTION

Indonesia is known as the largest swallow's nest exporter in the world, followed by countries such as Malaysia, India, Thailand, Singapore, Myanmar, Vietnam, and Sri Lanka (Sari & Sudiana, 2022) . According to data from the Ministry of Trade of the Republic of Indonesia, swallow's nest exports are expected to reach US$590 million in 2022, an increase of 14.21% compared to the previous year. This is a record high export value for Indonesian swallow nests, thanks to the contribution of entrepreneurs in the sector (Kementerian Perdagangan RI, 2023). Data from the Central Statistics Agency (BPS) shows that in 2023, Indonesia's swallow's nest exports reached US$633.24 million, equivalent to IDR10.24 trillion, with China as the main market absorbing 75.65% of total exports (Badan pusat statistik, 2024). The high demand for swallow's nest products provides a great opportunity for the development of aquaculture businesses. In addition to meeting domestic needs, the sector also offers promising export opportunities, contributing to Indonesia's economic growth (Muliati & Dawiya, 2022). Swallow nests, which are made from swallow saliva, have significant social and economic value. Currently, interest in swallow cultivation technology is increasing, allowing cultivation to take place in specially designed high-rise buildings, replacing traditional methods that rely on natural nests in remote locations (AR et al., 2023).

Parigi Moutong District, located in Central Sulawesi Province, has an area of 5,089.91 km² and a population of approximately 444,513 people. The swallow nest business in this area has only developed in the last ten years, but has become one of the export centers for swallow nest commodities in Central Sulawesi. In 2023, swallow's nest exports from Parigi Moutong Regency reached around 2,971 kg (Karantina Hewan Ikan dan Tumbuhan, 2024). There are approximately 1,009 swallow houses in this area, showing great potential for business development. In Parigi Moutong District, the swallow nest business is not just a side job, but also a golden opportunity to increase community income. Many traders have begun to look at the bright prospects of this business. With great potential, the swallow's nest business in Parigi Moutong Regency has the opportunity to develop further. However, entrepreneurs still face various obstacles, especially in the marketing aspect. Based on the background description above, this study aims to analyze swallow's nest marketing using the market structure and behavior approach in Parigi Moutong District, Central Sulawesi Province.

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METHODS

A. Market structure

This type of research adopts a quantitative descriptive approach using a survey method (Sugiyono, 2018) . The data analysis used is Market Share, *Hirschman Herfindahl Index* (IHH), *Concentration Ratio For Then Biggest Four* (CR_4) and *Minimum Efficiency Scale.* This can be seen as follows (Anindita & Baladina, 2017).

1. Market Share

Market share is the proportion of the market measured in units or revenue, and is calculated based on *specific entry* (Panagiotou, 2006).

$$MSi = \frac{si}{stot} x100\%$$

Description:

MSI : Market share of swallow nest entrepreneurs (%)
Si : Swallow nest entrepreneur sales (Rp)
Stot : Total sales of all swallow nest entrepreneurs (IDR)

2. Market Concentration

Market concentration can be interpreted as the proportion of market share controlled by the company compared to the total market share (Novita et al., 2021) .

a. *Hirschman Herfindahl Index*

$$IHH=(Kr_1)^2+(Kr_2)^2+....+(Kr_n)^2$$

Description:

IHH : *Index Hirschman Herfindahl (IHH)*
n Number of marketing institutions in a Swallow's Nest market area
Kr_1 : buyer share of the Ith trader (I=1,2,3...n)

Criteria:

IHH=1, leads to monopoly/monopsony
IHH=0, leading to perfect competition
0<IHH<1, leading to oligopoly/oligopsony

b. CR_4 (*Concentration Ratio For Then Biggest Four*)

$$CR_4 = \frac{the\ most\ correct\ number\ of\ market\ 4\ buyers\ (wholesalers)}{number\ of\ stores\ in\ all\ markets} x100$$

Testing Criteria:

1) $CR_{(4)}$ < 40% indicates a market structure that is perfectly competitive or monopolistic competition (need to see whether there is product differentiation or not).
2) 40% ≤ CR_4 80% then the market structure tends to be oligopoly/oligopsony

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3) CR_4 > 80%, then the market structure tends to lead to a monopolistic market

3. *Barrier To Entry*

Market entry barriers include all those that result in reduced opportunities for new competitors to enter the market (Abubakar et al., 2016).

$$MES = \frac{Bird's\ Nest\ Sales\ by\ wholesalers/collectors\ (kg)}{Total\ Bird's\ Nest\ Sales\ in\ the\ subdistrict\ (kg)} x100$$

Measurement Criteria:

a. *Minimum Efficie ncy Scale (*MES) > 10%= Difficult
b. *Minimum Efficiency Scale (*MES) value < 10% = easy

Market behavior

The analysis method used to analyze market behavior is descriptive analysis, which aims to collect information about market behavior (Dewi et al., 2018) . This research evaluates market behavior through: 1) pricing mechanisms to understand price formation in the marketing system, and 2) identification of collusive practices or other strategies among marketing institutions, as well as relationships between institutions in controlling the market (Dahl & Hammond, 1977).

RESULTS

Market Structure

Market share

a. Market share of swallow entrepreneurs

This study identified the number and volume of swallow nest sales in various marketing institutions, focusing on the market share of farmers, village traders, and large traders. The results show that the highest market share of entrepreneurs reached 6.11% with a concentration ratio of 0.06, while the lowest was 0.1% with a concentration ratio of 0.20. The CR4 value of 21% indicates that the market tends to be perfectly competitive, supported by the IHH value of 258.461 which indicates the bargaining position of entrepreneurs is very low. Of the 68 respondents, 50 entrepreneurs stated that the price of swallow's nest is determined by traders, and there is no significant product differentiation, so the products offered are homogeneous.

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b. Market Share of Village Vendors

Table 1. Calculation Results of *Market Share*, Concentration Ratio, CR4 and IHH of Village Merchants

Merchant	Production Capacity (kg)	Market Share (%)	Concentration Ratio	CR4 (%)	IHH
A	25	31,25	0,313	100	976,56
B	20	25	0,250		625
C	20	25	0,250		625
D	15	18,75	0,188		351,56
Total	**80**	100	**1,000**		**2578,13**

Source: Primary Data 2024

Based on the description of the table above, it can be seen that the market share of swallow nests in Parigi Moutong District at the village trader level is the highest at 31.25% with a concentration ratio of 0.313, while the lowest is 25% with a concentration of 0.250. The results of the CR4 calculation show a value of 100% with the CR4>80 criterion, which indicates that the market formed is monopolistic. This is reinforced by the IHH value of 2,578.13, which is within the IHH criteria of 1,000-1,800. Data obtained from the research location shows that there are few buyers, while the number of sellers is quite large. In addition, the calculation of market concentration also shows that the bargaining position held by traders in the village is quite strong.

c. Market Share of Village Vendors

Table 2. Calculation Results of Market Share, Concentration Ratio, CR4 and IHH of Wholesalers

Merchant	Production Capacity (kg)	Market Share(%)	Concentration Ratio	CR4	IHH
A	200	14,29	0,143	100	204,20
B	600	42,86	0,429		1836,98
C	300	21,43	0,214		459,24
D	300	21,43	0,214		459,24
Total	**1400**	**100**	**1,000**		**2959,67**

Source: Primary Data 2024

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Based on the table above, it can be seen that the market share of swallow nests in Parigi Moutong Regency at the wholesaler level is the highest at 42.86% with a concentration ratio of 0.429, while the lowest is 14.29% with a concentration of 0.143. The results of the CR4 calculation show a value of 100% with the CR4>80 criterion, which states that the market formed is monopolistic. This is reinforced by the IHH value of 2,959.67, which is within the IHH criteria of 1,000-1,800. The facts at the research location show that the number of buyers is small, while the number of sellers is large. The results of the market concentration calculation also state that the bargaining position held by large traders is high.

1. Market Entry Barriers

Barriers to market entry include all factors that reduce the opportunities for new competitors to enter the market. The analytical tool used for this purpose is called MES (*Minimum Efficiency Scale*), which serves as an indicator to evaluate the ability of new entrants to enter an industry based on firm output.

a. Swallow Entrepreneur

Market entry barriers at the entrepreneur level are 42.77% with criteria (MES) > 10% or difficult, meaning that there are barriers to market entry and exit because MES is more than 10%. The high MES can be a barrier to the entry of new entrepreneurs into the swallow's nest market in Parigi Moutong district. According to the research results, this is caused by several factors. First, there is a need for specialized knowledge and skills to cultivate swiftlets. Understanding how birds behave, how to build a good swallow house, and how to properly care for them are complex and take time to master. Secondly, large initial capital is a major obstacle. Building a swallow house, purchasing equipment, and paying for daily operational costs require a considerable amount of money. In addition, natural factors such as climate change can affect swallow nest production.

b. Village Trader

Market entry barriers at the village trader level are 100% with criteria (MES) > 10% or difficult, meaning that there are barriers to market entry and exit because MES is more than 10%. Based on the research results, market entry barriers for village traders are caused by large capital. Limited capital makes it difficult to buy swallow's nest in large quantities. In addition, the high and unstable price fluctuation is also a constraining factor. This situation risks causing losses if the market price suddenly drops dramatically.

c. Wholesaler

Market entry barriers at the large trader level are 100% with criteria (MES) > 10% or difficult, meaning that there are barriers to market entry and exit because MES is more

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than 10%. Based on the results of the study, market entry barriers for large swallow nest traders are caused by the need for large capital, high price fluctuations, and high operational costs, including transportation costs and labor costs.

Based on the results of the *Minimum Efficiency Scale* (MES) of entrepreneurs, village traders and large traders of swallow nests in Parigi Moutong District in line with research (Muliati & Dawiya, 2022) capital to build a swallow house is quite large, which consists of land and buildings or swallow houses, equipment costs, business licensing costs, costs of supporting facilities. The capital required in the swallow nest cultivation business is between Rp.50,000,000 to Rp. 2 billion.

Market Behavior

Market behavior is the behavior of marketing institutions that adjust to the market structure. In this study, market behavior includes pricing systems, collusion, market power and market institutions.

1. Pricing System

a. Swallow businessman

The pricing system in market behavior is the method used by marketing institutions to determine the price of goods or services based on the interaction between demand and supply. In Parigi Moutong District, the pricing system for swallow nests is generally simple and dominated by traditional market mechanisms. Entrepreneurs sell their harvest directly to village traders or large traders, with prices determined by traders based on quality, quantity, and market conditions. However, entrepreneurs often have limited market information and a weak bargaining position, so prices received tend to be lower than market value. Factors such as distance, transportation costs, and social relations also affect the selling price. The selling price of entrepreneurs to village traders is around IDR 6,000,000 per kilogram, while prices from large traders range from IDR 8,000,000 to IDR 9,000,000 per kilogram. Payment is usually made in cash, which entrepreneurs prefer to support further production capital.

b. Village Trader

The pricing of swallow nests by large traders to village buyers in Parigi Moutong District is influenced by factors such as quality, size, and market conditions. Larger, high-quality nests are usually priced higher, while high demand and limited supply may increase prices. The relationship between wholesalers and buyers also affects prices through negotiation. The selling price that village traders receive from large traders ranges from IDR 8,000,000 to IDR 9,000,000 per kilogram. Payment is made in cash or

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direct transfer, which village traders prefer to use as business capital, such as buying new nests or paying operational costs.

c. Wholesaler

Swallow nest pricing between companies and wholesalers in Parigi Moutong District is influenced by several factors, including the quality of the nest, the quantity sold, the origin of the nest, and the reputation of the trader. The company applies strict standards regarding the cleanliness, color, shape, and texture of the nests. Market demand, both local and global, is also influential; prices tend to rise when demand is high. The selling price of large traders to the company ranges from IDR 9,500,000 to IDR 10,000,000 per kilogram. Payment is made via transfer as agreed, usually when the nest arrives at the company or is in transit. Prompt payment allows the wholesaler to fulfill business needs, such as buying new nests and paying operational costs

2. Practice Marketing Function

The marketing function is a series of activities carried out by entrepreneurs and marketing institutions to distribute from entrepreneurs to large traders (Sinaga et al., 2023) . In this study, the swallow's nest marketing function includes the exchange function, physical function, and facility function.

Table 3. Swallow Nest Marketing Functions

Marketing institutions	Marketing function	Description	
Entrepreneur	Exchange function	Buy	√
		Sell	-
	Physical function	Transport	-
		Save	√
		Pack	-
	Facility function	Sorting	√
		Information	√
		Price	√
		Cost	√
		Risk	√
Village Trader	Exchange function	Buy	√
		Sell	√
	Physical function	Transport	√

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Marketing institutions	Marketing function	Description	
		Save	√
		Pack	-
	Facility function	Sorting	√
		Information	√
		Cost	√
		Price	√
		Risk	√
Wholesaler	Exchange function	Sell	√
		Buy	√
	Physical function	Transport	√
		Save	√
		Pack	√
	Facility function	Sorting	√
		Information	√
		Cost	√
		Price	√
		Risk	√

Source: Primary Data 2024

a. Marketing Function at the Entrepreneur Level

Swallow nest entrepreneurs act as producers in Parigi Moutong District, harvesting based on the volume produced with varying frequency, from weekly to a maximum of four months. After harvesting, nests are sold to village traders and large traders. Sorting is done to remove nests that do not contain eggs or chicks, maintaining the swallow population and the sustainability of the farm. Entrepreneurs face production risks, such as weather and pests, and often low prices. They also bear production costs and seek pricing information, which is often non-transparent and variable, making it difficult to set prices in line with market values.

b. Marketing Function of Village Traders

Village buyers function as intermediaries between swallow nest producers and upper-level buyers. They buy the nests from the farmers at an agreed price and resell them at a higher price. Transporting the nests requires clean, dry and strong vehicles and

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containers to prevent damage. Village buyers also conduct sorting to sort the nests by quality, size and type, so well-sorted nests have a higher selling value. The selling price is determined based on quality, quantity, and market conditions, with price negotiation being an important part of the process. Village buyers must understand market prices and hive characteristics to provide accurate information to buyers. They also face risks such as price fluctuations, changes in demand, and product damage.

c. Marketing Function at the Wholesaler Level

Swallow nest wholesalers serve as a link between mid-level buyers and producers or exporters. They purchase nests in large quantities, requiring larger transport vehicles and storage warehouses with refrigeration facilities to maintain quality. Purchased nests often come in different packaging, so wholesalers repackage them into uniform packaging according to standards. They also sort by quality, such as color and cleanliness. With greater access to market information, wholesalers are aware of consumer trends and preferences, and provide information to producers and village traders. They bear operational costs and play an important role in determining selling prices, which take into account quality, production costs, demand and competition to ensure profitability.

3. Marketing Institution

a. Marketing Channel I

This marketing channel is the shortest, with swallow nest entrepreneurs selling their products directly to large traders. There are 42 entrepreneurs involved in this channel, with 3 of them selling by going to large traders and 32 being visited by large buyers. Entrepreneurs who sell swallow's nest directly to large traders incur transportation costs of IDR 150,000. This cost is used to transport the product to the wholesaler in Palu City, which is located approximately 112 km from the research location and takes approximately 2 hours to travel. On average, entrepreneurs who sell swallow's nest directly to large traders produce between 1 and 3 kg per month. The quality of the swallow's nest is very good and can be sold for IDR 8,500,000 to IDR 9,000,000, which is higher than the price offered by village traders, which is IDR 6,000,000.

b. Marketing channel II

This marketing channel is the longest in this study. Swallow nest entrepreneurs sell their nests to village traders, with 26 people involved in this channel. 15 people went to village traders to sell their nests. 11 went to the trader to sell their nests. The cost incurred by entrepreneurs to sell swallow nests to village traders is between Rp.15,000,000-Rp.25,000,000. they sell their swallow nests to village traders who are

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around the location where they live. in this study there were 8 village traders. Village traders then sell the nests they buy to large traders. In this study there were 4 large traders traders. Large traders then sell their nests to companies that have agreed on a price agreement or bargaining.

Based on the results of the study, two marketing channel patterns were analyzed, namely marketing channel I and marketing channel II. Of the total respondents, 42 followed marketing channel pattern I, while 26 followed marketing channel pattern II. The results of the analysis show that marketing channel I dominates, due to the higher price of swallow's nest received by producers in channel I compared to the price in channel II, which can be seen in the following figure.

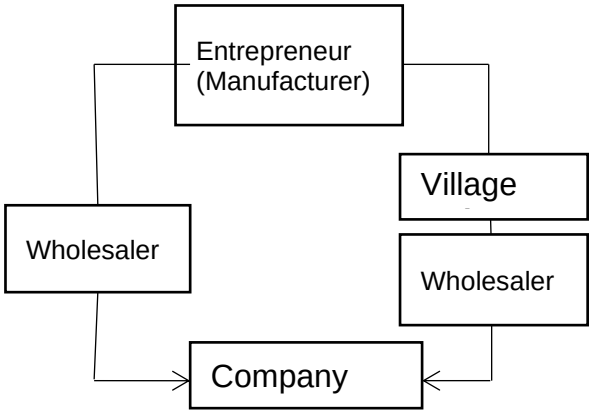


Figure 1. Marketing Channels

Description
Marketing channel 1 : Entrepreneur - Wholesaler - Company
Marketing channel 2: Entrepreneur - Village Trader - Wholesaler – Company

Market Structure

The highest market share of entrepreneurs reached 6.11% with a concentration ratio of 0.06, and the lowest share was 0.1% with a concentration ratio of 0.20, reflecting that entrepreneurs have a very low bargaining position in this market. The CR4 value of 21% indicates that the market tends to be perfectly competitive, where no single actor can dominate, while the IHH value of 258.461 confirms that entrepreneurs operate in a highly competitive environment. In contrast, the analysis at the village trader level shows the highest market share reaching 31.25% with a concentration ratio of 0.313, and CR4 reaching 100% indicating a monopolistic market. The IHH value of 2,578.13 indicates that

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village traders have a strong bargaining position, which can be attributed to the smaller number of buyers compared to the number of sellers. This creates a situation where village traders can set prices and market conditions that are more favorable to them. Similarly, at the large trader level, the highest market share reached 42.86% with a concentration ratio of 0.429 and CR4 also showing a value of 100%. The IHH value of 2,959.67 indicates that large traders have significant market power. The fact that the number of buyers is small while the number of sellers is large strengthens the bargaining position of large traders, allowing them to control prices and market conditions.

The results of this study show that there are significant barriers to the entry of new entrepreneurs into the swallow's nest market in Parigi Moutong Regency, which is reflected in the high Minimum Efficiency Scale (MES) value. At the entrepreneur level, the MES reached 42.77%, while at the village trader and large trader level, the MES reached 100%. This high MES indicates that the swallow's nest market is difficult to access, with several factors being the main causes. First, the need for specialized knowledge and skills in swallow cultivation is a barrier for potential entrepreneurs. The process of understanding bird behavior, building a suitable swallow house, and caring for the birds properly requires a significant amount of time and experience. Secondly, large initial capital is a major obstacle, with the cost required to build a swallow house. This capital constraint is also felt by village traders, who find it difficult to buy nests in large quantities, as well as large traders who have to bear high operational costs. High and volatile price fluctuations are also a significant constraining factor for all levels of market actors. Price uncertainty can lead to a large risk of loss, especially for village traders and large traders who have to operate in uncertain market conditions. This is in line with research (Muliati & Dawiya, 2022) which states that the capital to build a swallow house is quite large, consisting of equipment costs, business licensing costs, costs of supporting facilities. The capital required in the swallow nest cultivation business is between Rp. 50,000,000-Rp. 2 billion. Overall, the high market entry barriers in the swallow nest sector indicate the need for attention from the government and relevant agencies to create a more favorable environment for new entrepreneurs. Reducing these barriers is expected to improve the competitiveness of the swallow nest industry and boost local economic growth.

Market Behavior

The dynamics of the pricing system and marketing function of swallow's nest in Parigi Moutong District, involving entrepreneurs, village traders, and large traders. The

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simple pricing system dominated by traditional market mechanisms shows that the price of swallow's nest is determined by traders based on quality, quantity, and market conditions. Entrepreneurs are often in a weak bargaining position, resulting in lower selling prices compared to market value. This creates a challenge for entrepreneurs to get a fair return for their product. At the village trader level, pricing is influenced by nest quality and size, as well as market conditions. This is in line with research (Ansari & Rifani, 2024) which states that farmers often have limited information that causes them to be unable to set prices that match the actual market value.

Village traders serve as middlemen who buy nests from entrepreneurs and sell them to large traders. This process involves sorting to ensure quality, which in turn affects the selling price. Wholesalers, as the link between mid-level buyers and producers, have greater access to market information, which allows them to determine selling prices based on demand and operational costs. The two patterns of marketing channels identified-marketing channel I (entrepreneurs directly to large traders) and marketing channel II (entrepreneurs to village traders, then to large traders)-show that channel I is more profitable for entrepreneurs. By selling directly to large traders, entrepreneurs can obtain higher prices, reflecting the importance of efficiency in the distribution chain. Overall, this study highlights the need for entrepreneurs to improve their market knowledge and build better relationships with other marketing institutions. By understanding price dynamics and marketing functions, entrepreneurs can improve their bargaining position and maximize profits. In addition, support from the government and related agencies in the form of training and access to market information can help create a more supportive environment for swallow nest entrepreneurs.

CONCLUSION

The market structure at the entrepreneur level shows perfect competition, while at the village trader and wholesaler levels it is monopolistic. Entrepreneurs have a weak bargaining position due to limited market information, so the selling price is determined by traders. Swallow nest prices vary, with entrepreneurs selling to village traders at around IDR 6,000,000 per kilogram, and large traders offering prices between IDR 8,000,000 and IDR 9,000,000 per kilogram. There are significant barriers to market entry, mainly related to large start-up capital and the need for specialized knowledge in cultivation. The study emphasizes the need for support from the government and relevant agencies to create a more enabling environment for new entrepreneurs, as well as improving market knowledge so that entrepreneurs can improve their bargaining position.

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