

An Analysis of Strategies for Enhancing Market Share in the West Java Tissue Industry: A Case Study of PT XYZ

¹Josse Carnoven Simangunsong, ²Santi Novani

^{1,2}Master of Business Administration, Institut Teknologi Bandung, Bandung, Indonesia

¹josse.carnoven@gmail.com, ²snovani@sbm-itb.ac.id

ABSTRACT

PT XYZ, the market leader in West Java's dry tissue industry, faces market share growth stagnation due to intensifying competition and consumer price sensitivity. This study aims to analyze the internal and external factors causing this stagnation and to formulate effective business strategies to enhance PT XYZ's market share and penetration. This research employed a qualitative approach with a case study design focusing on PT XYZ. Data were collected through semi-structured interviews with key management personnel, supported by secondary data. Data were analyzed using VRIO, Porter's Five Forces, STP, Perceptual Mapping, and Competitor Analysis frameworks, then synthesized through SWOT analysis and the TOWS Matrix. The findings identified the company's main internal strengths (such as production facilities and product quality), weaknesses (value growth stagnation and potential cannibalization), external opportunities (eco-friendly products and distribution gaps), and threats (price sensitivity and competitive pressure). Based on this analysis, key strategies were formulated, including developing innovative eco-friendly products, expanding and optimizing the distribution network, and repositioning brands for specific market segments. The implementation of these strategies is expected to sustainably enhance PT XYZ's competitiveness and market share.

Keywords : Business Strategy, Market Share, Tissue Industry, Competitive Advantage

INTRODUCTION

The Fast-Moving Consumer Goods (FMCG) industry in Indonesia shows promising growth potential, in line with the projected population increase to an estimated 288 million people by 2025 (World Population Review, 2024). This sector provides various daily necessities, from food and beverages to personal care and household products, which are consumed en masse by the public. The growth of the FMCG market in Indonesia is also driven by increased consumer purchasing power, the convenience offered by modern retail including e-commerce, and rising awareness of personal hygiene. One prominent segment within the FMCG sector is the tissue products market, whose demand is expected to continue growing in line with increasing public awareness of healthy lifestyles. The pulp and paper industry, as a supplier of raw materials for tissue, is also a reasonably developed industry in Indonesia, with 89 paper-producing companies mostly spread across Java and Sumatra (Kementerian Perindustrian Republik Indonesia, 2023). Overall, Indonesia's tissue and hygiene paper industry is projected to reach a revenue of US\$10.67 billion in 2025, with an expected annual growth rate of 4.53% from 2025 to 2029 (Statista, 2025).

West Java Province, as one of the most populous provinces in Indonesia, represents a significant market share for tissue products. Research from a global market research company indicates that West Java is among the top four market share contributors for dry tissue, with a value share of 11% (Internal Company Source, 2025). PT XYZ (hereinafter referred to as the Company) is one of the main players in Indonesia's FMCG industry, with broad product diversification, including tissue and hygiene paper. In West Java itself, the Company holds the position of market leader in dry tissue, commanding a market share of 63% (Internal Company Source, 2025). Nevertheless, as illustrated in Figure 1, in recent years (2022-2024), the Company's market share growth has tended to stagnate. This phenomenon is attributed to increasing competitive intensity, both from local companies and the entry of foreign products capable of dominating certain market segments, as well as heightened consumer price sensitivity.

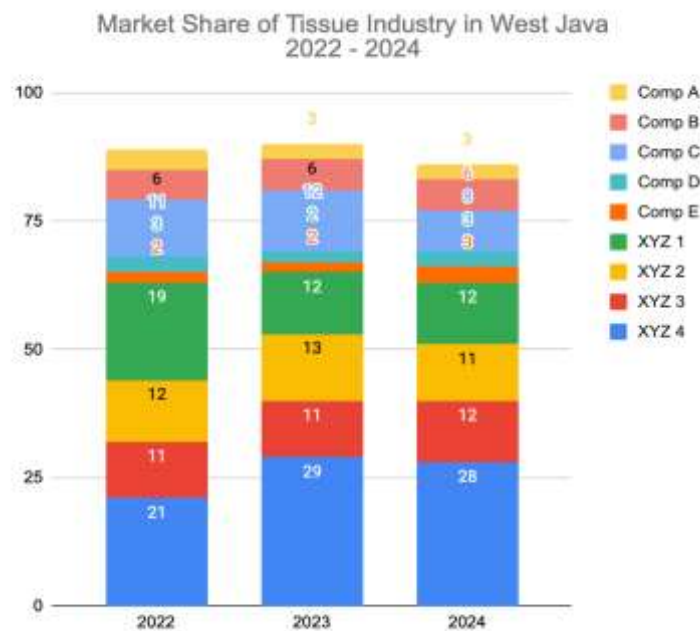


Figure 1 Tissue Industry Market Share in West Java 2022 - 2024

Facing the challenge of stagnant market share growth amidst significant remaining market potential and increasingly fierce competition, the Company needs to conduct an in-depth evaluation of the internal and external factors affecting it. Therefore, this research is crucial to comprehensively identify the root causes hindering this growth and subsequently to formulate the most appropriate and effective business strategies for the Company to regain market share and penetration in the tissue industry, particularly in the West Java region. The primary focus of this research is to answer questions regarding what factors contribute to the Company's stagnant market share growth and market penetration, what business strategies are suitable for overcoming these challenges and capitalizing on existing opportunities, and how a strategy implementation plan can be designed to achieve these objectives.

Thus, this research aims to conduct a comprehensive analysis of the internal and external factors causing the Company's stagnant market share and penetration, to formulate effective business strategies to address identified challenges and capitalize on market expansion opportunities, and to develop an outline of an implementation plan detailing tactical steps to achieve the desired improvement in market share and penetration. The practical benefit of this research is the provision of strategic recommendations that can be implemented by the Company's management to strengthen its competitive position. Furthermore, this research is expected to make an academic contribution by providing a deeper understanding of competitive dynamics and the application of growth strategies in the FMCG industry, particularly the tissue sector in Indonesia, which can serve as a reference for similar future studies. The scope of this research is exclusively focused on the analysis of business strategies for the Company's dry tissue products in West Java Zone 3.

THEORETICAL FRAMEWORK

Business Strategy and Competitive Advantage

In a dynamic and competitive business environment, a company's ability to formulate and implement appropriate strategies is a crucial factor in achieving superior performance and business sustainability. Business strategy can be defined as an integrated set of commitments and actions designed to exploit core competencies and achieve competitive advantage (Hitt, Ireland, & Hoskisson, 2015). Competitive advantage is central because it enables a company to create more value for its customers compared to competitors,

ultimately impacting market share and profitability. Therefore, an in-depth analysis of the company's internal factors and the dynamics of the external environment becomes an essential foundation for effective strategy formulation (Permana et al., 2023) .

Resource-Based Internal Environment Analysis

The analysis of a company's internal environment aims to identify its resources and capabilities, and how both can be developed into core competencies that provide a competitive advantage . One commonly used approach is the Resource-Based View (RBV), which states that sustainable competitive advantage derives from resources that are valuable, rare, inimitable, and well-organized (VRIO framework) (Barney, 2001; Barney & Hesterly, 2019) . The identification and management of these strategic resources allow a company to understand its strengths and weaknesses more objectively . Research by Rachmawati and Hidayat (2021) on strategies to enhance the competitiveness of SMEs in East Java also emphasizes the importance of utilizing unique resources to achieve excellence .

External Environment and Market Dynamics Analysis

Besides internal analysis, a comprehensive understanding of the external environment is also vital . The external environment includes industry analysis and competitor analysis, which can affect a company's profitability and sustainability . Porter's Five Forces framework provides a systematic analytical tool to evaluate the competitive structure within an industry, covering the threat of new entrants, bargaining power of suppliers, bargaining power of buyers, threat of substitute products, and intensity of rivalry among existing players (Porter, 2008) . This analysis helps companies identify key opportunities and threats in their industry . A study by Widyasari and Kaltum (2020) analyzing the competitiveness of the creative fashion industry in Bandung using Porter's framework demonstrates how understanding industry structure can guide strategy formulation . Furthermore, Segmenting, Targeting, Positioning (STP) analysis, perceptual mapping, and in-depth competitor analysis, as detailed in this thesis, provide a detailed understanding of market dynamics and the company's relative position against its competitors .

Integration of Internal-External Analysis and Strategy Formulation

The integration of findings from internal and external analyses is often realized through the SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis framework . SWOT analysis serves as a tool to identify the key strategic factors a company faces (Ghazinoory, Abdi, & Azadegan-Mehr, 2011) . However, SWOT analysis alone is not sufficient to generate actionable strategies . Therefore, the TOWS (Threats, Opportunities, Weaknesses, Strengths) Matrix was developed as a subsequent step to systematically formulate strategic alternatives by matching internal factors (strengths and weaknesses) with external factors (opportunities and threats) (Wehrich, 1982) . This approach ensures that the resulting strategies are not only reactive to the environment but also proactive in leveraging internal capabilities . Research by Pramudita and Sukaatmadja (2019) on marketing strategies for SME products in Bali shows the effectiveness of using SWOT analysis followed by the TOWS matrix to generate concrete strategic recommendations .

Conceptual Framework of the Research

Overall, the conceptual framework of this research is based on a comprehensive strategic management approach. It begins with an in-depth understanding of the company's internal environment (through VRIO) and the external environment (through Porter's Five Forces, STP analysis, perceptual mapping, and competitor analysis) . Findings from both analyses are then synthesized to identify the Strengths, Weaknesses, Opportunities, and Threats (SWOT) faced by PT XYZ . Based on this SWOT analysis, the TOWS Matrix is used to formulate various alternative strategies aimed at increasing the Company's market share and penetration in the West Java tissue industry . This line of thinking ensures that the proposed strategies have a strong analytical basis and are relevant to the company's specific context . The integrated use of these various analytical tools is also consistent with views in strategic management literature that emphasize the importance of a holistic

approach (see also Grant, 2021; Hitt, Ireland, & Hoskisson, 2015). Several national studies, such as those conducted by Handayani et al. (2022) concerning business development strategies, also frequently combine these analytical tools to obtain a complete picture. The article by Afandi and Pradekso (2021) discussing marketing communication strategies also shows how market situation analysis forms the basis for strategy formulation. Lastly, research by Setiawan and Najib (2020) on strategies to enhance the competitiveness of agricultural products demonstrates the relevance of internal and external analysis in the context of specific products in the Indonesian market.

METHODOLOGY

This research employed a qualitative approach with a case study design focusing on PT XYZ. The qualitative approach was chosen because it aims to deeply understand the phenomenon of market share stagnation experienced by the company and to explore the various complex internal and external factors underlying it (Creswell, 2014). The case study design allows researchers to conduct an intensive investigation of the Company as a unit of analysis within its real business environment context, thereby generating a holistic and contextual understanding of the researched problem and the proposed strategies (Saunders, Lewis, & Thornhill, 2023). This study is cross-sectional, with data collection conducted within a specific period to analyze the current situation.

Data collection in this study involved two types of data sources: primary and secondary data. Primary data were obtained directly through semi-structured interviews with three key informants from within PT XYZ. These informants were selected based on the relevance of their positions and strategic authority, consisting of representatives from top management of the West Java Region, the Marketing Director, and the Sales Director. The selection of these informants aimed to obtain a comprehensive perspective on operations, marketing strategies, market conditions, as well as the challenges and opportunities faced by the company. The research instrument used was a pre-prepared interview guide, which included a list of open-ended questions designed to elicit information related to VRIO analysis, Porter's Five Forces, Segmenting, Targeting, Positioning (STP), Perceptual Mapping, and competitor analysis. Meanwhile, secondary data were collected from various sources such as internal company documents, industry reports, official publications, journal articles, books, and other relevant sources to support and complement the primary data.

The data analysis technique used in this study was thematic analysis, which was applied to identify, analyze, and report patterns (themes) in the qualitative data obtained from the interviews (Braun & Clarke, 2006). The data analysis process was carried out through several systematic stages, including: (1) organizing the interview data (transcription and classification); (2) thoroughly reading and understanding the data to get a general overview; (3) coding or categorizing the data to identify significant information segments; (4) presenting data in narrative form and analysis matrices; and (5) interpreting the findings to draw conclusions that answer the research questions (Miles, Huberman, & Saldaña, 2014). The thematically analyzed data were then integrated into relevant business environment analysis frameworks: VRIO analysis for internal aspects, and Porter's Five Forces, STP, Perceptual Mapping, and competitor analysis for external aspects. The results of this analysis were subsequently synthesized using SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to map the company's internal and external strategic factors. Based on this SWOT mapping, the TOWS Matrix was used to formulate alternative business strategies recommended for PT XYZ.

RESULTS AND DISCUSSION

Research Findings

1. Internal Environment Analysis of PT XYZ (VRIO)

VRIO analysis was conducted to identify PT XYZ's internal resources and capabilities that could potentially become competitive advantages. The analysis results indicate that the Company possesses several Sustainable Competitive Advantages. The Company's

established and large-scale production facilities and supply chain network, supported by vertical integration from raw material processing to finished products, provide cost efficiency, quality control, and supply security. Competent human resources, product quality that has been tested and accepted by the market for many years, product diversification capable of reaching various market segments, and extensive marketing channels and programs also constitute the Company's main strengths. However, it was also found that the Company's significant reputation as part of a well-known conglomerate has not been fully utilized (Unused Competitive Advantage) in the specific context of its tissue product brands, as consumers tend to recognize its product brands more than PT XYZ as the parent company. A summary of the VRIO analysis results is presented in Table 1.

Table 1 PT XYZ VRIO Analysis Results

Variable	V	R	I	O	Implication
Production facility and supply chain	✓	✓	✓	✓	Sustainable Competitive Advantage
Human Resources	✓	✓	✓	✓	Sustainable Competitive Advantage
Product quality	✓	✓	✓	✓	Sustainable Competitive Advantage
Product diversification	✓	✓	✓	✓	Sustainable Competitive Advantage
Marketing channels and program	✓	✓	✓	✓	Sustainable Competitive Advantage
Company reputation and brand image	✓	✓	✓		Unused Competitive Advantage

2. External Environment Analysis of the West Java Tissue Industry

Understanding the external environment was obtained through several analyses: Porter's Five Forces, Segmenting, Targeting, and Positioning (STP), Perceptual Mapping, and Competitor Analysis.

Porter's Five Forces Analysis

This analysis identified that the threat of new entrants in the West Java tissue industry is medium; despite being capital-intensive, small local players and foreign products still emerge. The threat of substitute products is rated low due to the specific function of tissue and the lack of a comprehensive equivalent replacement. Rivalry among existing competitors in the market is high, characterized by intense price and promotion competition. The bargaining power of suppliers is generally medium, but for PT XYZ, which has an integrated supply chain, this power becomes low. Conversely, the bargaining power of buyers is high due to the many brand choices in the market and high price sensitivity, especially in the lower segment. A summary of the Porter's analysis is presented in Table 2.

Table 2 Summary of Porter's Five Forces Analysis for the West Java Tissue Industry

Threat of New Entrants	Threat of Substitute	Rivalry among competitors	Bargaining Power of Suppliers	Bargaining power of buyers
Medium	Low	High	Medium	High

Segmentation, Targeting, and Positioning (STP) Analysis

In-depth interviews with the Company's marketing and sales teams revealed different purchasing behaviors for each variant of PT XYZ's tissue products. Premium products (XYZ3) target upper-middle-class consumers who are quality and sustainability-oriented, located in urban areas. Mid-range products (XYZ1 & XYZ2) cater to practical and budget-conscious middle-class families, with active promotional strategies. Economy products (XYZ4) are aimed at low-to-middle-income consumers and small traders who are highly

price-sensitive, with a focus on mass availability. Each product is positioned differently to compete in its segment; XYZ3 as "Premium Without the Import Price Tag," XYZ1 & XYZ2 as "Reliable Affordable Quality," and XYZ4 as "Lowest Price, No Compromise".

Perceptual Mapping Analysis

Based on the company's internal data regarding perceptions of quality (softness and tensile strength) and price, a perceptual map was created positioning PT XYZ's products relative to its competitors. The results show that the XYZ3 product occupies the high-quality, premium-price quadrant. Products XYZ1 and XYZ2 are in the middle area, offering a balance between quality and price. Meanwhile, product XYZ4 is in the low-price quadrant with quality that is also relatively lower compared to other XYZ products. This map also identifies the relative positions of key competitors (Com A, B, C, D, E) in each segment.

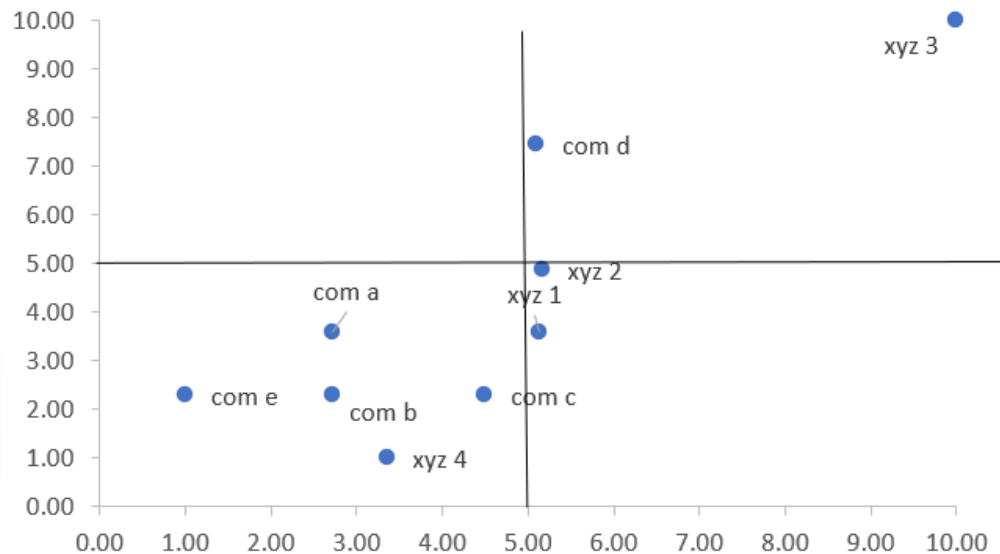


Figure 2 Perceptual Map of PT XYZ Tissue Products and Competitors in West Java

Competitor Analysis

Analysis of competitors indicates that although PT XYZ's products (XYZ1-4) collectively dominate the market share in West Java (approximately 63% based on value spends), several competing products (Com A, Com D, Com E) show significant value growth rates, even exceeding 20%. This indicates a potential future threat, especially in the mid and low segments which are very sensitive to price and competitor innovations. In terms of brand image, products XYZ1, XYZ2, and XYZ3 have strong positions and are listed in the Top Brand Index, while XYZ4 and most competing products (except Com A, which is starting to enter the index) do not yet have similar recognition.

3. SWOT Analysis of PT XYZ

Based on the integration of internal and external environmental analyses, the SWOT analysis for PT XYZ is formulated as follows:

1. Strengths:
 - a. Market leader with a dominant market share.
 - b. Complete product variation covering all segments.
 - c. Strong brand reputation and over 30 years of industry experience.
 - d. Extensive and efficient production facilities and value chain distribution network, both local and global.
2. Weaknesses:
 - a. Product value growth tends to be stagnant compared to some competitors.
 - b. Potential for market cannibalization between XYZ1 and XYZ2 products which are in the same segment (SKU Proliferation).

3. Opportunities:
 - a. Increasing trend in demand for sustainable and eco-friendly products in Indonesia.
 - b. Existing distribution gaps in several areas within the research region that have not been optimally reached.
4. Threats:
 - a. High consumer price sensitivity, especially in the lower-middle segment.
 - b. Strong competitive pressure in the mid and low segments from players showing high sales growth through various strategies.

A summary of the SWOT analysis is presented in Table 3.

Table 3 Summary of PT XYZ SWOT Analysis

<p style="text-align: center;"><u>Strength</u></p> <ul style="list-style-type: none"> • Market Leader • Product Assortment • Strong Brand Reputation • production facility and value chain distribution 	<p style="text-align: center;"><u>Opportunity</u></p> <ul style="list-style-type: none"> • Sustainable and Eco-Friendly Product • Distribution Gap
<p style="text-align: center;"><u>Weakness</u></p> <ul style="list-style-type: none"> • Stagnation Value Growth • SKU Proliferation 	<p style="text-align: center;"><u>Threat</u></p> <ul style="list-style-type: none"> • Price Sensitivity • Competitive Pressure in the Mid and Low Segments

Discussion of Market Share Enhancement Strategies

Based on the SWOT analysis conducted, this research formulates several proposed strategies using the TOWS Matrix. This matrix is designed to generate strategies by leveraging internal strengths to capture external opportunities (S-O Strategies), overcoming internal weaknesses by utilizing external opportunities (W-O Strategies), using internal strengths to counter external threats (S-T Strategies), and minimizing internal weaknesses while avoiding external threats (W-T Strategies).

Strategy Synthesis via TOWS Matrix

Several key strategies generated from the TOWS Matrix analysis include:

1. S-O Strategies: Launching eco-friendly tissue products (e.g., from 100% recycled paper) to lead the sustainable segment, leveraging existing reputation and market reach. Implementing horizontal distribution expansion to unserved areas and building vertical distribution for greater control. Utilizing local Key Opinion Leaders (KOLs) for penetration in new target areas. Developing product innovations that provide added value and meaningful consumer experiences.
2. W-O Strategies: Strengthening the positioning of the XYZ2 brand, which is experiencing declining value growth, for instance, by repositioning it as part of the "home care product" category. Implementing bundling promotions to increase penetration in underserved areas.
3. S-T Strategies: Strengthening partnerships with distributors and retailers, especially for XYZ4 products, to maintain market position amidst price competition. Positioning XYZ4 as an economical brand effective for attacking competing brands in the price-sensitive market. Launching special edition products to drive consumer engagement amidst competitor pressure.
4. W-T Strategies: Repositioning the XYZ2 brand from the consumer tissue category to a "Home Care Brand" to address potential cannibalization and competitive pressure. Increasing production efficiency through investment in new machinery so that the price of XYZ4 can be more competitive and overcome value stagnation amidst price sensitivity.

A summary of the proposed strategies based on the TOWS Matrix is presented in Table 4.
 Table 4 TOWS Matrix Strategy for PT XYZ

	Strengths	Weaknesses
Opportunities	<p><u>SO</u></p> <ul style="list-style-type: none"> • propose eco-friendly products such as tissues made from 100% recycled paper • Horizontal distribution - expansion to areas that are not yet covered by distribution using the most effective/efficient depot • Vertical Distribution - coverage all business process • Using KOLs who have the most engagement in the targeted area • Product innovation brings more meaningful experience, and added value 	<p><u>WO</u></p> <ul style="list-style-type: none"> • Strengthen current positioning of XYZ2 brand due to decreased value growth • bundling promotion
Threats	<p><u>ST</u></p> <ul style="list-style-type: none"> • Strengthen partnership, especially for XYZ 4 products • XYZ 4 as an economic brand effective for attacking other brands in the market • Special edition product to drive consumer engagement 	<p><u>WT</u></p> <ul style="list-style-type: none"> • Repositioning Strategy Brand XYZ 2 from the consumer tissue category to "A Home Care Brand" • Increase production with new machines so that the price of XYZ 4 becomes cheaper

Discussion of Strategic Implications

The proposed strategies resulting from the TOWS analysis are designed in an integrated manner to address PT XYZ's main challenge: stagnant market share growth in West Java. Launching eco-friendly products (S-O Strategy) not only responds to a growing market trend but also leverages the Company's strengths in reputation and production capacity to create differentiation and brand loyalty. This strategy aligns with the concept of differentiation-based competitive advantage that can generate superior value for consumers (Porter, 1985). Expansion and optimization of the distribution network, both horizontal and vertical, are logical steps to reach untapped markets (distribution gaps) and improve efficiency, which is crucial in facing price competition.

Repositioning the XYZ2 brand as a "home care product" is a creative effort to overcome weaknesses such as potential cannibalization with XYZ1 and competitive pressure in the mid-segment. This strategy aims to broaden product relevance and create new market niches, consistent with seeking a "blue ocean" in a saturated market (Kim & Mauborgne, 2005). Increasing production efficiency to lower the price of XYZ4 is a direct response to the threat of price sensitivity and pressure from competitors in the lower segment, enabling the Company to compete more aggressively on volume.

Overall, this combination of strategies aims to strengthen the loyal customer base through innovation and differentiation (especially in the premium and repositioned mid-segments), while simultaneously maintaining and expanding market share in price-sensitive segments through improved efficiency and better distribution reach. The implementation of these strategies, as detailed further in the implementation plan within the thesis, requires resource commitment and strong cross-functional coordination within the Company. The success of

these strategies will heavily depend on PT XYZ's ability to execute the plan effectively and adaptively to the ever-changing market dynamics.

CONCLUSION

Conclusion

This research aimed to analyze the internal and external factors causing the market share stagnation of PT XYZ in the West Java tissue industry, and to formulate effective business strategy proposals to increase market share and penetration. The internal analysis revealed that PT XYZ possesses significant strengths in terms of production facilities, supply chain networks, human resources, product quality, product diversification, and marketing programs. However, weaknesses were identified regarding the stagnation of product value growth compared to competitors and potential cannibalization between product lines. From an external perspective, opportunities were identified in the form of an increasing trend in demand for eco-friendly products and optimally unreached distribution areas. On the other hand, the main threats come from high consumer price sensitivity and strong competitive pressure, especially in the lower-middle segments.

Based on the SWOT analysis and strategy synthesis via the TOWS Matrix, this research recommends that PT XYZ implement a dual-focus strategy combining product innovation with aggressive distribution expansion to enhance market penetration. The main strategic approaches proposed include: (1) launching an eco-friendly tissue product line (e.g., from 100% recycled paper) to leverage its market leadership and address sustainability trends; (2) implementing horizontal and vertical distribution strategies to reach underserved areas and strengthen supply chain control; and (3) applying careful repositioning and pricing strategies (e.g., positioning XYZ4 as an economy brand and XYZ2 as a home care product) to overcome value growth stagnation and price sensitivity in the market. These initiatives, if supported by hyperlocal Key Opinion Leader (KOL)-based marketing campaigns and increased production efficiency, are expected not only to overcome existing challenges but also to capitalize on market expansion opportunities, thereby ensuring the continued dominance of PT XYZ in the tissue industry.

Recommendations

Based on the findings and limitations of this research, several recommendations for relevant future research can be proposed to deepen the understanding of the tissue industry and its business strategies:

1. Conduct studies on the customer journey and the factors influencing repeat purchase decisions for dry tissue products to provide more detailed insights into consumer behavior.
2. Explore in greater depth the aspects of green supply chain management in the tissue industry, considering the increasing awareness of environmental issues.
3. Investigate the potential application of automation or big data analytics for optimizing distribution networks and inventory management in the tissue industry, which has large production and distribution volumes.
4. Conduct further studies on the phenomenon of brand cannibalization in companies that have more than one brand in the same market segment, as could potentially occur with PT XYZ's products.

The research recommendations above are expected to generate broader and more comprehensive discussions on various aspects of the tissue industry, from strategic and operational perspectives to consumer behavior. In terms of managerial implications, PT XYZ is advised to seriously consider the proposed strategies and to develop a detailed action plan, taking into account resource allocation and potential risks that may arise during implementation.

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