# The Dynamics of Advocacy Coalition Actors in the Downstream of the Export-Oriented Palm Sugar Industry in Kebumen Regency, Indonesia

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**ABSTRACT**
Industrial downstreaming is one of Indonesia's eight National Priorities under the 2026 Government Work Plan (Presidential Regulation No. 117/2025), part of the Asta Cita agenda and the 2025–2029 National Medium Term Development Plan, making its regional implementation increasingly relevant to study. Palm sugar, a local commodity with strong value addition potential, can strengthen the local economy and advance gender equality within micro, small, and medium enterprises. National demand reaches around 400 tons per year, while domestic demand alone stands at roughly 20 tons per month, far exceeding national production capacity of only 5 to 10 tons per month, underscoring the need for stronger value chain governance. Kebumen Regency's poverty rate declined from 15.71% in 2024 to 13.58% in 2025 per BPS data, a trend worth sustaining through palm sugar downstreaming, which engages many female micro entrepreneurs in villages, though implementation still faces limited market access and potential actor resistance. This study examines communication dynamics among advocacy coalition actors and how their belief systems, interests, and power relations shape support for or resistance to downstreaming policy in Kebumen, using the Advocacy Coalition Framework in a qualitative case study. Data will be gathered through semi structured interviews with 26 purposive informants from government, industry, village enterprises in Sempor, and the community, supported by observation, documentation, and focus group discussions, then analyzed via data reduction, display, and conclusion drawing with triangulation. Findings are expected to inform evidence based, gender inclusive policy recommendations aligned with SDGs 1, 5, and 10.

**ABSTRAK**
Hilirisasi industri merupakan salah satu dari delapan Prioritas Nasional dalam Rencana Kerja Pemerintah 2026 (Perpres No. 117/2025), bagian dari Asta Cita dan RPJMN 2025–2029 sehingga implementasinya di daerah semakin relevan untuk dikaji. Gula semut, komoditas lokal dengan potensi nilai tambah tinggi, dapat memperkuat ekonomi masyarakat dan mendorong kesetaraan gender dalam UMKM. Permintaan nasional mencapai sekitar 400 ton per tahun, sementara kebutuhan domestik saja sekitar 20 ton per bulan, jauh melampaui kapasitas produksi nasional yang hanya 5–10 ton per bulan, menegaskan perlunya penguatan tata kelola rantai nilai. Angka kemiskinan Kabupaten Kebumen turun dari 15,71% pada tahun 2024 menjadi 13,58% pada tahun 2025 menurut data BPS, tren yang perlu dijaga melalui hilirisasi gula semut yang melibatkan banyak pelaku usaha mikro perempuan di desa, meski implementasinya masih menghadapi keterbatasan akses pasar dan potensi

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resistensi aktor. Penelitian ini mengkaji dinamika komunikasi antaraktor koalisi advokasi serta bagaimana sistem keyakinan, kepentingan, dan relasi kuasa memengaruhi dukungan maupun resistensi terhadap kebijakan hilirisasi di Kebumen, menggunakan Advocacy Coalition Framework dengan pendekatan studi kasus kualitatif. Data dikumpulkan melalui wawancara semi terstruktur terhadap 26 informan purposif dari pemerintah, pelaku industri, badan usaha desa di Sempor, dan masyarakat, didukung observasi, dokumentasi, dan FGD, lalu dianalisis melalui reduksi data, penyajian data, dan penarikan kesimpulan dengan triangulasi. Temuan diharapkan mendukung rekomendasi kebijakan berbasis bukti dan inklusif gender yang selaras dengan SDGs 1, 5, dan 10.

## INTRODUCTION

The industrial downstream program is designated as one of the eight National Priorities in the 2026 Government Work Plan as stipulated in Presidential Regulation Number 117 of 2025, as well as being part of the implementation of the Asta Cita agenda in the 2025–2029 National Medium-Term Development Plan (Pemerintah Pusat, 2025) . In the context of this policy, ant sugar emerged as a commodity based on local resources with strategic potential to encourage gender equality and strengthen the people's economy through increasing added value in the micro, small, and medium business sectors (Annsori & Syafrizal, 2025). The market demand for Indonesian ant sugar shows a fairly significant trend both at the domestic and global levels. According to the Directorate of Small and Medium Trade and Domestic Products, Ministry of Trade of the Republic of Indonesia, national demand reaches around 400 tons per year covering both domestic and export markets, while domestic market needs alone are estimated to reach 20 tons per month, while national production capacity only ranges from 5 to 10 tons per month, thus showing a considerable supply deficit to demand (Kementerian Koperasi dan UKM RI, 2022). The increasing global demand for natural and sustainable food products further strengthens the downstream position of ant sugar as a significant economic opportunity for producing areas such as Kebumen Regency (Wang et al., 2024).

This opportunity is increasingly important considering that Kebumen Regency has recorded a significant decrease in the poverty rate, from 15.71 percent in 2024 to 13.58 percent in 2025, based on official data from the Central Statistics Agency (Pemerintah Kabupaten Kebumen, 2025). Maintaining these achievements requires strengthening the people-based real economic sector, and downstreaming ant sugar is one of the relevant paths, considering that this sector directly involves local farmers and many women micro business actors at the village level. The Advocacy Coalition Framework explains that actors in a policy subsystem coordinate to form coalitions based on the same belief system and leverage common resources to influence the policy process, especially when the issue is related to structural changes or the sustainability of a sector (Wesche et al., 2025). In addition to formal regulations, this framework also emphasizes that policy dynamics are also shaped by communication patterns, information exchange, and power relations between actors involved. Communication between actors is thus a key element in determining the effectiveness of downstream policies and the sustainability of the people's economy.

Despite this potential, the downstream of ant sugar in Kebumen Regency still faces considerable challenges, including limited access to national and international markets and potential social resistance from actors involved in the integration process into the industrial value chain. This problem is exacerbated by the limited empirical studies that integrate gender equality perspectives into the dynamics of local economic policy communication, especially at the district level. Based on this, the problems raised in this study consist of two things, namely how the dynamics of communication between actors in the advocacy coalition take place throughout the downstream process of ant sugar in Kebumen Regency, and how the system of beliefs, interests, and power relations between actors forms the emergence of support and resistance to downstream policies in an effort to maintain the sustainability of the local people's economy

The Advocacy Coalition Framework is used as a theoretical foundation in this study because it views policy as the result of actors outside the formal governance structure who form coalitions based on shared values and interests, and interact to influence policy in the long term (Jenkins-Smith et al., 2018). The framework also distinguishes three levels of belief systems, namely ideological core beliefs that reflect fundamental views, policy core beliefs related to preferred problem solutions, and secondary empirical beliefs based on scientific evidence,

all three of which shape how actors respond to new evidence as well as changes in socio-political values (Pierce et al., 2017; Ma & Vieira, 2020; Kammermann & Angst, 2021).

Industrial downstreaming policies have emerged as a pivotal economic agenda to accelerate value-added production, yet their implementation frequently triggers complex socio-political friction among diverse stakeholders. While existing literature extensively addresses the economic feasibility and technical impacts of downstreaming, it often overlooks the underlying political dynamics and communication pathways through which actors navigate policy conflicts. As governments press forward with these structural shifts, competing coalitions, ranging from state officials and industrial players to local communities and civil society groups, actively negotiate, resist, and shape policy outcomes. Understanding these dynamic coalition behaviors is therefore critical to resolving the growing contestation surrounding resource governance.

The novelty of this research lies in applying the Advocacy Coalition Framework (ACF) to examine actor communication dynamics within industrial downstreaming policies, specifically bridging social resistance with the advocacy strategies of pro- and anti-policy coalitions—an integrative socio-political perspective that remains underrepresented in current literature. This thematic gap is visually substantiated through bibliometric network mapping based on the keywords "actor dynamics," "advocacy coalition," and "social resistance" (see Figure 1). The network visualization reveals weak co-occurrence and significant structural distance between these domains over the past five years, confirming that this thematic synthesis remains largely unexplored (Donthu et al., 2021; Verma et al., 2021).

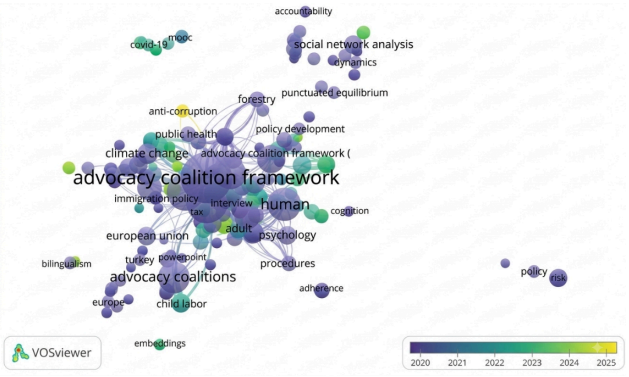



Figure 1. Visualization Network by Vosviewer
Source: Researcher Data Processing, 2026

This research is different from previous research that examined advocacy coalitions at the global and European levels (Funke et al., 2021; Gronow et al., 2020), as well as from studies that focus more on the factors that inhibit and drive policy implementation in general (Rosmayanti & Permana, 2024). On the other hand, this study examines how belief systems in advocacy coalitions shape social resistance to downstream policies at the local level, while integrating gender equality perspectives that are still rarely studied in the context of agro-industrial downstreaming in Indonesia (Sari et al., 2024). This study aims to examine the dynamics of communication between advocacy coalition actors and analyze how their belief systems, interests, and power relations shape support and resistance to the policy of downstream ant sugar in Kebumen Regency, with the hope of producing evidence-based and gender-inclusive policy recommendations to support poverty alleviation and regional economic sustainability, in line with Sustainable Development Goals 1, 5, and 10.

## METHODS

This research uses a qualitative approach with a case study design, which aims to explore and understand the responses of various actors to a social phenomenon in its natural context (Creswell & Creswell, 2018). This approach was chosen because the research problems related to communication dynamics, belief systems, and power relations between actors, which are more precisely understood through in-depth exploration than numerical measurements.

The research was conducted in Kebumen Regency, Central Java, with a special focus on Sempor District as the center of production and downstream activities of ant sugar. The determination of informants uses the purposive sampling technique, which is the determination and retrieval of information sources deliberately and

not randomly based on certain criteria relevant to the focus of the research (Hardani et al., 2020). At least 26 informants were involved in this study, consisting of representatives of local governments in charge of industry and cooperatives, ant sugar industry players including women micro business actors, administrators of Village-Owned Enterprises (BUMDes) in Sempor District, and community members who are affected or involved in the downstream process.

Data collection is carried out through several complementary techniques. Semi-structured interviews were conducted to obtain in-depth information on the perspectives, interests, and belief systems of informants related to the downstream policy of ant sugar. Field observations were carried out to directly capture the interaction patterns and communication dynamics between actors in the ant sugar value chain. Documentation is used to collect supporting data such as policy documents, activity reports, and other relevant records. In addition, Focus Group Discussion (FGD) was conducted to explore common perspectives between key actors and clarify themes that emerged during the interview and observation stage (Sugiyono, 2020).

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The collected data was analyzed using an interactive model developed by Miles and Huberman, which consisted of three main stages, namely data reduction, data presentation, and conclusion drawing and verification (Miles et al., 2019). Data reduction is carried out by selecting, simplifying, and focusing the raw data obtained from interviews, observations, and documentation to fit the focus of the research. The presentation of data is carried out by compiling data that has been reduced to the form of a descriptive narrative and, if relevant, into a matrix that maps the relationship between actors, belief systems, and coalition positions. Conclusions are drawn gradually throughout the research process and are continuously verified against the data to ensure their validity. To maintain the credibility of the findings, this study applies triangulation of sources and methods. Source triangulation was carried out by comparing information obtained from various categories of informants, namely government actors, industry actors, and the public, while method triangulation was achieved by comparing the results of interviews, observations, and documentation. This triangulation process allows researchers to cross-check findings from various sources and data collection techniques, so as to minimize bias and strengthen the reliability of the analysis results (Creswell & Creswell, 2018).

## RESULTS AND DISCUSSIONS

### Production Profile and Structure of Ant Sugar Value Chain in Sempor District

Based on the results of an interview with Mr. Lasino as the chairman of the ant sugar artisan community, it is known that the production process of ant sugar in Sempor District is still carried out traditionally. The ingredients used are entirely natural with no addition of chemicals, and the cooking process still relies on wood-fired stoves.



Figure 2. Coconut Sap Cooking Process
Source: Researcher Data Processing, 2026

These findings are consistent with the statements of about 20 other informants from the production element, namely farmers and ant sugar artisans interviewed in this study, who conveyed similar conditions regarding production methods and challenges faced. The consistency of the answers among the majority of informants from this element of production indicates that the findings regarding traditional production conditions and value chain structures that have not involved artisans at the marketing stage are quite representative of the general picture at the level of ant sugar producers in Sempor District.

In terms of value chain, it was found that the role of ant sugar farmers and artisans is limited to the production stage only. The produce is packaged in sacks and sold to collectors (see Figure 3), which then passes it on to further distribution stages. This structure shows a clear separation between production actors and distribution-marketing actors in the ant sugar value chain at the local level, while indicating that artisans are not heavily involved in the downstream stages of the value chain that usually provide larger margins of value-added.



Figure 3. Ant Sugar Produced
Source: Researcher Data Processing, 2026

## Palm Sugar Distribution Chain Structure to Export Market

The distribution chain of ant sugar to the export market takes place through several stages involving farmers or craftsmen, collectors, CVs, and exporter PTs before the product is finally marketed to various export destination countries. This distribution pattern places farmers and artisans as the main producers who only play a role in providing products, while the process of collection, quality selection, packaging, fulfillment of legality, and access to international trade networks is still managed by intermediary actors. This condition indicates that farmers and artisans do not have direct involvement in the export distribution chain, so the bargaining position, access to market information, and opportunities to obtain added value are still relatively limited. Therefore, this distribution scheme is an important starting point to analyze the dynamics of inter-stakeholder relations, policy communication patterns, and the challenges of downstreaming the ant sugar industry in supporting the sustainability of the people's economy.

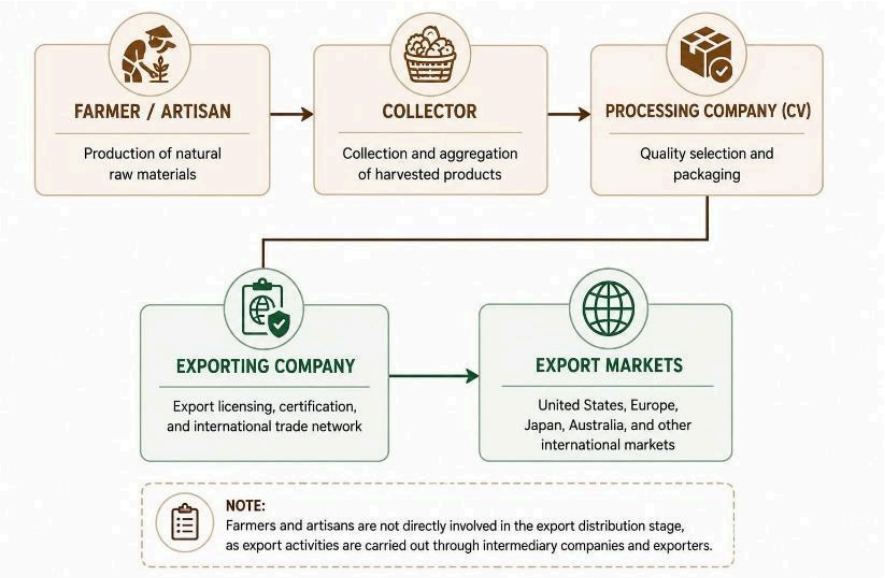



Figure 4. Palm Sugar Distribution Chain
Source: Researcher Data Processing, 2026

The findings from the CV representative clarify the mechanism of distribution of ant sugar before it reaches the export market). According to the informant, the ant sugar produced by farmers or artisans is not sold directly to the exporting company, but through a gradual chain: the farmer/craftsman sells to the collector, the collector sells to CV to go through the quality selection process, packaging, and adjustment according to market needs, then CV markets the product to companies (PT) that have legality and international trade networks to be further exported. This finding explains in more detail why farmers and artisans, as conveyed by Mr. Lasino, are generally unable to export independently, namely due to limited market access, business legality, fulfillment of export standards, and the ability to meet administrative requirements and international trade certification. The informant emphasized that the existence of collectors, CV, and PT each have different functions in maintaining the sustainability of the supply chain, starting from collecting production results, controlling quality, to ensuring that products meet export market standards, so that collaboration between actors is an important factor in supporting export-oriented ant sugar downstream in Kebumen Regency.

## Local Government Perspectives on the Potential and Challenges of Palm Sugar

Haryono Wahyudi, S.T., M.T., as the Head of the KUKM Disperindag of Kebumen Regency, explained that Micro, Small, and Medium Enterprises (MSMEs) have a strategic role in the regional economy, with a contribution of around 60% to the Gross Regional Domestic Product (GDP) and the absorption of around 70% of the workforce in Kebumen Regency. One of the leading commodities with great potential to continue to be developed is coconut sugar, especially ant sugar, which has successfully penetrated the export market to the United States, European countries, Japan, and Australia

According to him, Kebumen Regency has around 1,379 ant sugar producers spread across several sub-districts, including Rowokele, Ayah, Sempor, Buayan, and Puring, with the abundant availability of coconut sap raw materials being one of the main advantages of the region. However, in order to increase competitiveness and obtain a higher selling value in the international market, business actors need to meet various requirements, including the ownership of organic certification and international certification as a guarantee of quality and consumer trust. To support this, the Kebumen Regency KUKM Disperindag runs various assistance programs, including business incubation, financing facilitation through interest subsidies, human resource capacity building, legality assistance and business certification, promotion through national and international exhibitions, and digital-based marketing development. He emphasized the importance of synergy between the government, business actors, academics, and various stakeholders in developing the Kebumen Regency ant sugar industry, with the spirit of "from Kebumen to the world market" as a hope that Kebumen ant sugar can become a superior product that is highly competitive in the global market.

### Society's Perspective on the Introduction and Marketing of Palm Sugar

In contrast to the perspective of production, distribution, and policy, informants from elements of society highlighted problems in terms of product recognition. The informant said that public knowledge about ant sugar is still relatively limited, with some people not knowing ant sugar as a processed coconut sugar product that has added value compared to printed sugar and its export potential. However, after trying it directly, the informant assessed that ant sugar has a distinctive taste, is more practical to use, and has the potential to be accepted by various consumers. According to the informant, the low level of public introduction to ant sugar is due to the limited promotion and branding of products. So far, ant sugar is more widely known as a commodity marketed through collectors or companies, so the identity of products from Kebumen Regency has not been attached to the community. Informants suggested stronger branding strategies, such as the use of social media, participation in exhibitions, more attractive packaging, and the inclusion of the identity of the region of origin. The informant also assessed that the development of ant sugar should not only be export-oriented, but also followed by the expansion of the domestic market through education to the public about the benefits of ant sugar as a natural sweetener, because increasing public awareness has the potential to boost market demand and provide greater economic benefits for coconut sugar artisans and farmers

### Priority Gap Between Actors

A gap in priorities between actors in the development of the ant sugar value chain began to emerge. Production actors focus on increasing production capacity, process quality, and revenue, while the government focuses more on aspects of certification, legality, strengthening branding, export market access, and business financing. On the other hand, CV as a distribution actor prioritizes supply chain efficiency, fulfillment of quality standards, and expansion of export networks, while the community still faces low product recognition, weak branding, and limited domestic market penetration. These differences in orientation show that each actor brings different interests and priorities, which has the potential to cause a coordination gap in the downstream process of the ant sugar industry. If not managed through effective communication and collaboration, these differences in priorities can hinder the creation of inclusive, efficient, and sustainable value chain governance.

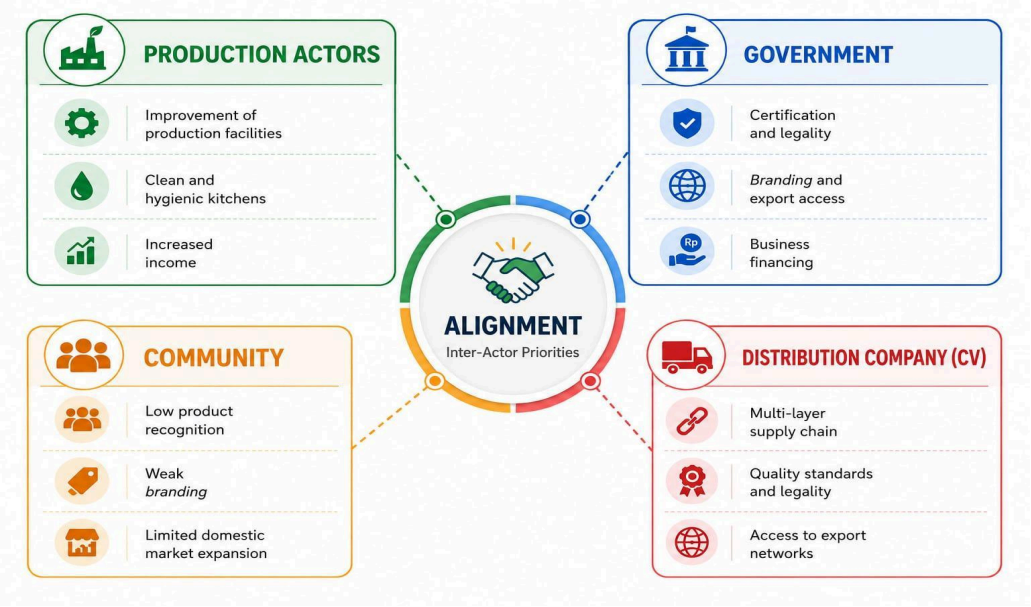



Figure 5. Actor-Level Priority Gap in Ant Sugar Downstream
Source: Researcher Data Processing, 2026

The comparison of these four perspectives shows that there is a common point as well as a gap, as illustrated in Figure 1. The common point lies in the mutual recognition of the great potential of ant sugar as a superior product, both in terms of the availability of raw materials, market demand, and potential consumer acceptance. The scale of this problem is also significant, considering that according to data from the KUKM Disperindag there are around 1,379 ant sugar producers spread across five sub-districts in Kebumen Regency, so the communication dynamics and priority gaps found in this study have the potential to have a wide impact.

Nevertheless, the four actors put the emphasis on different levels. The Head of the KUKM Disperindag emphasized the challenges at the level of fulfilling organic and international certification, branding, access to financing, and the competitiveness of the export market. Production actors emphasized a more basic need, namely the improvement of production facilities such as kitchens that are clean and meet hygiene standards. Community actors highlighted a different problem, namely the low introduction of products at the domestic consumer level due to weak branding and lack of public education. Meanwhile, CV representatives pointed out that the multi-layered distribution chain structure, from collectors to exporters, is a factor in itself that limits the direct involvement of farmers and artisans in the export process, regardless of the efforts to increase production capacity and certifications that they may have met. The gap in emphasis between these four actors indicates a potential gap in the effectiveness of communication and policy implementation, which is not only vertical (between policy and implementation), but also structural along the distribution chain itself.

## Discussion in the Advocacy Coalition Framework

If reviewed using the Advocacy Coalition Framework, the perspective of the Head of the KUKM Disperindag can be understood as a representation of the policy core beliefs of government actors, namely beliefs about strategies and programs that are considered appropriate to encourage the competitiveness and export of ant sugar, such as certification, branding, access to financing, and digital marketing (Pierce et al., 2017; Kammermann & Angst, 2021). The findings of Mr. Lasino and the majority of production informants reflect the secondary beliefs of production actors, namely empirical and operational beliefs based on direct experience in the field, such as the need for proper production facilities. The perspective of community actors can be understood as secondary beliefs at the consumer level, which highlights the gap between product potential and the acceptance rate of the domestic market due to weak branding. Meanwhile, the perspective of CV representatives shows how the secondary beliefs of distribution actors are formed from operational experience of maintaining quality standards and legality throughout the supply chain, which in practice also limits the space of movement of production actors in the export value chain.

The difference in the level and focus of beliefs among these four actors is important to understand, because within the framework of ACF, the incompatibility between the policy core beliefs of policymakers and the secondary beliefs of actors in the field, both in terms of production, distribution, and consumers, has the potential to be a source of resistance or lack of effectiveness of programs offered by the government, although in general these four groups of actors are in a coalition that equally supports the downstream of ant sugar (Jenkins-Smith et al., 2018). These findings also indicate that an effective downstream strategy needs to bridge four sides of the problem at once, namely strengthening production facilities and standards at the upstream level, structuring a more inclusive distribution chain for production actors, strengthening certification and export market access at the policy level, and strengthening domestic market branding and education at the consumer level.

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Overall, these findings show that the challenges of downstreaming ant sugar in Kebumen Regency are multidimensional, including communication gaps between government actors and production actors, limited producer involvement in the distribution-export chain, and product introduction gaps at the domestic consumer level, a problem that has the potential to impact thousands of ant sugar producers spread across five sub-districts of Kebumen Regency. These findings are the basis for understanding how belief systems and power relations between actors shape the dynamics of advocacy coalitions in downstream policies in Kebumen Regency, as well as how this gap can be bridged through a more participatory communication pattern between actors, especially by involving women business actors who have occupied central positions but are less explicitly touched by the four existing actors' perspectives

## CONCLUSIONS

This study shows that the dynamics of communication between actors in the coalition for the downstream advocacy of ant sugar in Kebumen Regency are shaped by differences in priorities among four groups of actors, namely production actors, local governments, communities, and distribution actors (CV). The four actors both support the downstream of ant sugar, but emphasize different aspects: production actors highlight the basic need in the form of improving production facilities, local governments focus on certification and export competitiveness, communities highlight the weak introduction of products in the domestic market, while distribution actors point out that the layered supply chain structure also limits the direct involvement of farmers and artisans in the export process. Analyzed through the Advocacy Coalition Framework, this difference in emphasis reflects the gap between the policy core beliefs of policymakers and the secondary beliefs of actors in the field, which has the potential to be a source of resistance and reduced effectiveness of downstream programs even though the four actors are in the same coalition.

The study also found that the gender equality dimension, although women occupy a central position in ant sugar production at the village level, has not been explicitly addressed in government programs, community branding strategies, and distribution chain governance. Thus, an effective downstream strategy of ant sugar in Kebumen Regency needs to bridge four sides of the problem at once, namely strengthening production facilities at the upstream level, structuring a more inclusive distribution chain, strengthening certification and market access at the policy level, and strengthening branding and education of the domestic market, while still explicitly integrating the needs of women business actors in each policy line. These findings are expected to serve as a basis for the formulation of evidence-based and gender-inclusive downstream policies, in line with the achievement of Sustainable Development Goals 1, 5, and 10.

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