

Analisis industri hypermarket di Indonesia dengan aliran stucture conduct performance

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Abstrak

Sejak dikeluarkannya kebijakan liberalisasi ritel pada tahun 2000, hypermarket sebagai salah satu bentuk ritel modern mengalami perkembangan yang sangat pesat. Perkembangan yang pesat itu perlu diawasi untuk mencegah adanya persaingan yang tidak sehat di dalamnya sehingga sangat menarik untuk mengetahui kondisi struktur, perilaku, dan kinerja yang terbaru dari industry hypermarket dengan menggunakan metode Structure Conduct Performance (SCP) dan juga untuk mengetahui hubungan antara tingkat konsentrasi dan kinerja perusahaan. SCP diasumsikan sebagai suatu hubungan sebab-akibat yang stabil antara struktur suatu industri, perilaku perusahaan, dan kinerja perusahaan-perusahaan di dalamnya. Penggunaan metode ini diharapkan dapat melihat bagaimana konsentrasi pada pasarnya, hambatan dalam memasuki pasar, tingkat persaingan, dan lain sebagainya. Berdasarkan data 2002-2006, Industri hypermarket di Indonesia berstruktur oligopoli dengan konsentrasi tinggi dengan nilai rata-rata CR4 sebesar 91,23%, dan nilai rata-rata HHI sebesar 2363,99. Perilaku perusahaan dalam menghadapi persaingan yang sangat pesat itu dilakukan dengan memilih lokasi gerai yang strategis, memberikan produk yang lengkap, teknologi canggih, harga yang lebih murah, promosi melalui media cetak dan media elektronik, dan lain sebagainya. Kinerja perusahaan dinilai melalui rasio keuangan menunjukkan kemampuan setiap perusahaan dalam menghasilkan laba dan memenuhi pembayaran hutang jangka pendeknya sangat kecil. Perusahaan juga sangat bergantung kepada modal dari luar dalam menjalankan kegiatannya. Hubungan tingkat konsentrasi dan kinerja perusahaan tidak berpengaruh secara signifikan.

.....Since retail liberalization policy was issued in the year 2000, hypermarket, one of modern retail industry, has experienced a significant growth. The fast growth of modern retail has drawn huge attention from the government in order to maintain healthy and fair competition within the industry. This condition makes the retail industry an interesting subject to be observed, particularly in important aspects, such as the structure, conduct, and performance of companies that become the players within the industry. One of the best ways to observe these characteristics of a certain industry is by the Structure Conduct Performance (SCP) approach. SCP is assumed as a firm cause and effect relation between the structure of a certain industry with the behaviour (conduct) and performance of the companies within the industry. The application of this method aims to portray the market concentration of the industry, the level of competition, barriers in entering the industry, and other related information regarding condition of the industry. Based on the collected data from the year 2002-2006, hypermarket follows an oligopoly structure that has high concentration level with CR4 value as much as 91.23% and HHI value as much as 2363,99. The behaviour (conduct) of the companies, in dealing with the competition in the industry, mostly by placing their stores in strategic places, delivering various products to the customers, utilization modern technology, competitive pricing, promotion through medias, etc. Performance measurement of each company is measured by measuring financial ratios, and the result explains that the ability of the companies to gain profits is somewhat low. This result also applies in the ability of the companies in paying debts and the effectiveness of the usage of their source of payment.

Companies also demonstrate high reliance on external source of payment. The relation between the level of market concentration and companies' performance are insignificant.