PENETRATION OF IMPORTED PRODUCTS ON E-COMMERCE PLATFORM IN INDONESIA AND STRATEGIES FOR IMPROVING LOCAL PRODUCT COMPETITIVENESS

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Abstract: This study discusses the penetration rate of imported products on e-commerce platform in Indonesia and strategies to improve local product competitiveness. The authors used the biggest e-commerce platform in three most sold product categories in 2019. Big data were collected from website on 126,366 clothing products, 504,118 beauty products, 1,966,046 electronics products, and 1,540 product reviews in the first quarter of 2020. The authors utilized qualitative analysis including descriptive analysis, sentiment analysis, content analysis, and SWOT analysis. This study found that the penetration rate of imported products on e-commerce platforms in Indonesia is high, at 66 percent for cosmetics, 58 percent for electronic accessories, and 40 percent for clothing. Positive reviews of local products are higher than those of imported products in all product categories where the aspects of quality and delivery are the most important things for customers when buying online. Some strategies to improve the competitiveness of local products against imported products, first, local producers and sellers should exploit the positive public sentiment towards local products against imported products. Second, the Indonesian government along with e-commerce platforms and education institutions should promote local producers and sellers to strengthen the later parties' existence online. Third, the Indonesian government must enforce the law on e-commerce platforms. Fourth, the statistics bureau should collect e-commerce data. Last, local producers and sellers should be able to stage their product advantages against imported products comprising thoughtful service, fastest delivery, and standardized quality.

Keywords: *Imported Product Penetration, E-Commerce Platform, Sentiment Analysis, Big Data Analysis, SWOT.*

1. Introduction

The rapid development of science and technology today creates and encourages changes in people's lifestyles to be more practical and efficient. In Indonesia, online shopping has become a trend. There are many platforms gathering sellers online in one place like BukaLapak, Lazada, Tokopedia, Shopee, JD.ID, Blibli.com and others. Google Trends illustrated that Shopee led the search until the end of November 2019 compared to other e-commerce platforms.
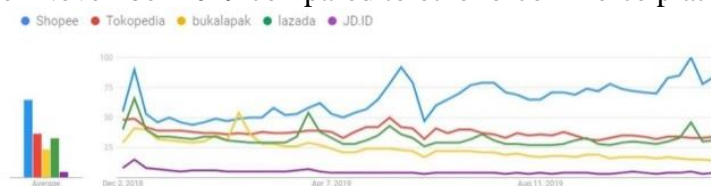
Figure 1: E-Commerce Platform Mostly Searched in Indonesia.
(Source: Google Trends by November 2019)

Although the e-commerce industry is continuing to soar in Indonesia, Gati Wibawaningsih, Director General of Small and Medium Industries, Ministry of Industry, stated that market share of local products is still low (Pebrianto, 2019). She said that around 90 percent of products offered on e-commerce in Indonesia are imported products. This statement was supported by Berly Martawardaya, an economist at the Institute for Development of Economic and Finance, who stated that there was a relationship between increases in imports of consumer goods with an increases of online shopping (Andri DP, 2019). On the other hand, according to iDEA, chaired by Ignatius Untung said that the value of an e-commerce imports that occurred was still small and controlled below 0.5 percent (Annur, 2019)

The contradictory statements called for further research in this field. Given that e-commerce is a brand new trend in Indonesia, research in this area is scarce thus this research is expected to fill this gap. All claims above are based on estimates as e-commerce database is not yet established. It is necessary to prove empirically whether imported products are indeed dominating e-commerce platforms in Indonesia when compared with local products. Whether the statement supported or rejected, e-commerce platforms provide information on how to improve the competitiveness of local products via product reviews and sentiments of imported products when compared with local products on e-commerce platforms in Indonesia. This research is crucial as a stepping stone in creating a level playing field between imported and local products (Rumata, 2016; Simanjuntak, 2019), materializing potential tax revenue as well as controlling excessive online import (S. Setiawan, 2018), nourishing local firm's ability to thrive (Wulandari, 2012) without impeding firm's performance (Narjoko et al., 2018).

2.   Research Method

This research only focused on three categories of imported and local products in the same category on e-commerce platform. The selected online shopping application is Shopee provided its stand as one of the biggest application in terms of mostly searched (See figure 1) and most popular by the end of 2019 (Nugroho, 2019) as well as its feature of direct international delivery via app. The latest feature was not offered in other apps such as Tokopedia and Bukalapak which was especially important in this research as the authors specifically differentiated imported products from their international shipping feature. The authors focused on three product categories which are the most popular products bought by consumers in 2019 (Kemp & Moey, 2019) i.e. clothing category including three subcategories that is women's clothing (tops), men's clothing (tops), and pants; cosmetics or beauty products category including five subcategories that is facial cosmetics, body makeup, eye cosmetics, lip cosmetics and hair care and last but not least electronic accessories category including a) casing, covers, soft cases, b) computers and their accessories, and c) hand phones, hand phone accessories, and tablets. Data were collected during the first quarter of year 2020.

The authors utilized qualitative analysis including descriptive analysis, sentiment analysis, content analysis, and SWOT analysis. Descriptive analysis was used to analyze the share of imported products penetration compared with local products. Sentiment analysis was used to obtain and assess public opinion, comments or feedbacks about an object (Wilianto et al., 2017). The authors classified each sentence and determined the general sentiments contained in the sentence based on product reviews (Fang & Zhan, 2015). Positive sentiment was graded one, negative comment was valued minus one, and neutral sentiment was classified zero point.

Subsequently, the authors used content analysis to explore the meaning of product reviews submitted by consumers (Manzilati, 2017). Because this research includes big data where the

amount of data is unlimited (Rumata, 2016), the authors implemented purposive sampling technique to determine the reviews that would become the sample (Wijaya, 2019) as the authors limited the first 300 reviews each sub-category. The reduced and abstracted data were then analyzed using SWOT to identify systematically various factors in order to formulate comprehensive strategies (Rangkuti, 1998) to maximize strengths and opportunities while simultaneously minimize weaknesses and threats (Kasmiruddin & Armi, 2014).

3. Results and Discussion
3.1. Results
3.1.1. Penetration of Imported Products on E-commerce Platform

The authors collected 126,366 clothing products, out of which 50,336 imported products been sold, thus the penetration rate of imported clothing products on the Indonesian e-commerce platform was around 40 percent. The authors also found that 332,817 imported cosmetics or beauty products sold out of 504,118 products comprising the penetration rate of approximately 66 percent. This rate was considered high to the point that imported products dominated the beauty product market in Indonesia. Eventually, 1,140,759 imported electronics products were sold out of 1,966,046 total products in this category; hence the market share of imported electronics products was about 58 percent which was definitely higher than that of local products. These findings were published beforehand under the following figure.
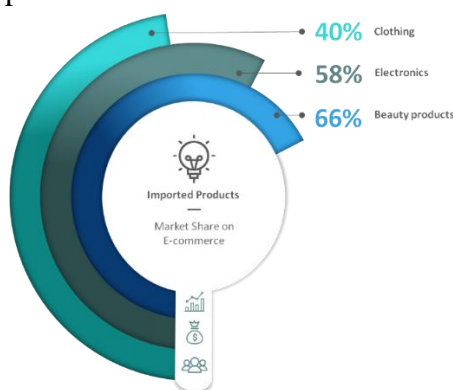
Figure 2: Imported Products Market Share on E-Commerce Platform (Kartikasari, 2020)

3.1.2. Strategies to Improve the Competitiveness of Local Products
Strategies Related to Public Sentiments on Imported versus Local Products

Table 1 below shows that imported products receive lower sentiment reviews in total than local products. Local products win by 25 percent for clothing, 30 percent for beauty products, and 47 percent for electronics. Positive reviews for local products surpass those of imported products by 15 percent for clothing, 17 percent for beauty products, and 27 percent for electronics. Likewise, negative reviews for local products are less than those of imported products by 10 percent for clothing, 13 percent for beauty products, and 20 percent for electronics. Hence, public sentiments towards local products are more positive than that of imported products.

Table 1. Public Sentiments on Imported versus Local Products per Category

Product Category	Sentiment Review	Imported Product		Local Product		Difference
Clothing	Negative	36	16%	17	6%	10%
	Neutral	21	10%	14	5%	5%

	Positive	166	74%	269	89%	-15%
	Total	223	58%	300	83%	-25%
Cosmetics or Beauty	Negative	56	19%	13	6%	13%
	Neutral	15	5%	2	1%	4%
	Positive	229	76%	200	93%	-17%
	Total	300	57%	215	87%	-30%
Electronics	Negative	91	30%	21	10%	20%
	Neutral	28	10%	6	3%	7%
	Positive	181	60%	175	87%	-27%
	Total	300	30%	202	77%	-47%

Given the positive public attitude towards local products compared with imported products, it is imperative that local sellers exploit this advantage against imported products. The e-commerce consumers should be aware of the risks involved in choosing imported products which might result in lower satisfaction than choosing local products. The Indonesian government should utilize this positive sentiment to promote national merchandises so that consumers prefer those of local than those of out of country.

Strategies Related to Aspects of Imported versus Local Products
The authors analyzed the content of each product review and figured out that reviews could be grouped into four types of reviews, namely service, product quality, product delivery and product packaging.

Table 2. Aspects of Imported versus Local Products per Category

Product Category	Product Review Content	Imported Product		Local Product		Difference
Clothing	Service	18	8%	40	13%	-5%
	Product Quality	145	65%	164	55%	10%
	Product Delivery	51	23%	77	26%	-3%
	Product Packaging	9	4%	19	6%	-2%
Cosmetics or Beauty	Service	57	19%	42	20%	-1%
	Product Quality	97	32%	36	17%	15%
	Product Delivery	83	28%	71	33%	-5%
	Product Packaging	63	21%	66	30%	-9%
Electronics	Service	46	15%	40	20%	-5%
	Product Quality	91	30%	59	29%	1%
	Product Delivery	135	45%	64	32%	13%
	Product Packaging	28	10%	39	19%	-9%

Most reviews on clothing products focused on product quality while electronics products on product delivery. In cosmetics category, service was the least reviewed aspects. Product quality of cosmetics imported products was the most reviewed factor contributing to 32 percent

while product delivery of cosmetics local products was the most commented issue at 33 percent. Based on the content of product review, the strengths of local products are:

S1   Faster product delivery. Domestic products are not too hindered regarding distribution issues, so products can immediately reach the buyers.
"*Ngirimnya juga cepet Bandung - Tangerang ngebut beeeut*" [Delivery is fast, Bandung – Tangerang speeding]

S2   Domestic products adapt to the situation of local consumers so that products can easily fit into the culture of the local community.
"*hasilnya nyata belang ilang..pdhl hbs travelling pasti belang kena panas pkae hb ini skitar seminggu belang udah ilang warna kulit jd sama..*" [The results are real, the stripes disappear ... after traveling, the spots appear because of heat, after using this HB for about a week, the stripes have disappeared, and the skin color is the same]

S3   There is no language barrier in communicating between domestic sellers and buyers related to the problem of returning goods and other complaints, this also includes regarding the quality of the products and services of the seller.
"*admin nya ramah bgt. walaupun aku banyak nanya. thankyou.*" [The admin is very friendly although I ask a lot. Thank you]
While for imported products, "*Di chat no respon*" [I chat, but no response]

S4   The originality value of the product is better maintained.
"*Produk oriiii.. wanginya enak enak bgt..*" [Original product… the scent is very good]

S5   Some products can be considered exclusive because of local work of art.
"*Bahan nya bagus, motif nya unyu semuaaa*" [Fabric is good, the motive is all cute]

While the weaknesses of local products as follow:

W1   The number of local products are still lacking when compared with imported products on the e-commerce platform. This statement is supported by the fact delivered in this study that cosmetics and electronic product categories are dominated by imported products as well as by another statement (Rahayu, 2020).

W2   Local products lack diversity and innovation. Local products are similar to imported products, most are not so unique products and not standardized (Soegiono, 2012).

W3   Marketing and promotion of domestic products in Indonesian society is still lacking compared to foreign products. Pictures and written information of local products are less attractive (Mudassir, 2018).

W4   The quality of local products is still perceived to be lower than foreign products (Kartikasari, 2020).

W5   Image as a domestic product are still less attractive to the public (E. Setiawan, 2014).

There are opportunities that can be used to help improve the competitiveness of local products as follow:

O1   Technological developments affect the acceptance of online shopping in Indonesia. This trend attract more massive local entrepreneurs (Rahayu, 2020).

O2   The Indonesian government fully supports e-commerce. E-commerce roadmap was released, programs were put in place (Taqwa, 2020).

O3   Indonesian consumers follow global trends that are developing and changing. This global trend is a good predictor of consumer behavior (Yulistara, 2018).

O4   E-commerce platforms are increasing in numbers in Indonesia. These new platforms provide more options for local retailers and local producers (Taqwa, 2020).

O5   The Indonesian government has been campaigning to encourage people to give their preference to domestic products. This campaign has been done in holistic approach including trade, education, and culture (Syaifudin et al., 2016).

Whereas threats for local products to head up were as follow:

T1   Public stigma on the quality of domestic products is less desirable (Darusalam, 2018). This negative attitude towards local products threatens their sustainability.

T2   The Indonesian government has difficulties in enforcing the regulations related to creating a level playing field for local and foreign sellers on e-commerce platforms. This lack of law enforcement discourage local sellers (Luthfan & Pasha, 2019).

T3   Imported products enter Indonesian market almost freely and directly to customers (Taqwa, 2020).

T4   Indonesian consumers behave ethnocentrically (Khairani & Abdillah, 2018) but in the same time prefer imported product (Soegiono, 2012).

T5   The number of distributors of foreign products is increasing (Huda, 2019).

Therefore, strategies to improve the competitiveness of local products are as below:

1.   The Indonesian government along with online shopping applications should promote local producers and sellers to strengthen their existence online (O1, O2, O3, O4, S1).

2.   The Indonesian media, supported by the government, should promote the authenticity and the value of domestic products. These campaigns are important to shape positive attitude towards local products when compared with imported products especially in terms of product quality and variety. The last two aspects mentioned are among disadvantages of local products (S2, S3, S4, S5, O5).

3.   The government and e-commerce platform companies in Indonesia must collaborate in conducting counselling about online buying and selling to MSMEs (Micro, Small and Medium Enterprises), such as how to optimize e-commerce, how to increase sales, how to copywriting effectively, how stage products, how to deliver service excellence through the application (S1, S3, S5, T2).

4.   The Indonesian government must enforce the law on e-commerce platforms, especially to imported products and foreign sellers. The statistics bureau ought to have the right to collect data imported products circulating in the domestic electronic market so that they can be monitored by the government (T3, T5).

5.   Local producers and sellers should be able to stage their product advantages against imported products comprising thoughtful service and fastest delivery. These two aspects should be maintained and boost to attract practical consumers (S1, S3).

6.   Local producers and sellers must maintain the standard quality of local product starting from procurement, production, and delivery. This standardized product must be aggressively advocated (S4, S5, T1, T4).

7.   Local producers and sellers ought to adjust to market trends. This adaptation skill is especially important in the ever changing market of online shopping (W1, O1, O2, O3).

8.   Local produces and sellers ought to watch global trends as to spark innovation and new creative ideas, in order to create innovative and iconic domestic products (W2, W3, W4, W5, W5, O1, O2, O3).

9.   Local producers and sellers could attract more attention from the public by inviting public figures who are on the rise as a model or brand ambassador of the product (W3, W5, T1, T4).

3.2. Discussions

The penetration rate of imported products on e-commerce platforms in Indonesia can be said to be quite high, especially in the two product categories, namely the cosmetics or beauty product category and electronic accessories product category are at 66 percent and 58 percent respectively (See Figure 2). These percentages indicate that more than half the product sold are products from abroad or imported products, thus this study confirms previous statements (Mudassir, 2018; Pebrianto, 2019). However, for one product category, namely clothing, the penetration rate of imported products is 40 percent. This penetration rate states that foreign products have not yet dominate clothing category in Indonesia although over time domestic products should be aware of losing in competing in this electronic market. This finding confirms previous research specifically in fashion (E. Setiawan, 2014) and textile (Wulandari, 2012). It is important to note that this study found the market share of imported products in each product category based on such a big data that has never been done in previous research other than estimates. This finding is this article's most significant contribution to the literature in the field of cross border e-commerce in Indonesia. This study calls for further research for estimating the trend of penetration rate of imported products on e-commerce, hence this study also calls for validating and extending the methodology for this research so that it will provide more accurate method for next studies.

Both imported products and local products received good responses based on sentiment analysis of the product reviews on big data (Fang & Zhan, 2015). However, positive reviews of local products are higher than imported products namely in the clothing products category at 89 percent against 74 percent of imported products, in the cosmetics or beauty products category at 93 percent against 76 percent of imported products, in the electronic accessories category at 87 percent against 60 percent of imported products (See Table 1). Furthermore, the negative reviews for local products are lower than those of imported products namely in the clothing products category at 6 percent against 16 percent of imported products, in the cosmetics or beauty products category at 6 percent against 19 percent of imported products, and in the electronic accessories category at 10 percent against 30 percent of imported products. These findings are extremely vital to boost the confidence of local producers and sellers because this research found that consumers like local products than imported products in some aspects. Thus, local producers and sellers should feel proud of their performance in servicing e-commerce consumers. These findings were supported by previous research that claimed that local products had some advantages that imported products did not (Khairani & Abdillah, 2018; E. Setiawan, 2014; Soegiono, 2012; Wulandari, 2012).

Regarding product reviews, the most frequently conveyed ones are product quality and delivery. This research found that the aspects of quality and delivery are the most important things for customers when buying online as supported by previous study (Lin et al., 2011). Product quality is defined as whether real product matches its descriptions or not. In the apparel product category, the number of reviews of imported products discussing product quality is 65 percent whereas local products is 55 percent while in the category of cosmetics or beauty products of imported products is 32 percent (See Table 2). Product delivery is defined as how fast or slow the delivery of goods to consumers. In the category of electronic accessories products, the number of reviews of imported products discussing product shipments is 45 percent and that of local products is 32 percent. In the category of cosmetics or beauty local products, the product delivery contributes 33 percent. Furthermore, reviews about product packaging and service are two categories of reviews that are not very common to be found. In this way,

however, it can be said that even though the service is given indirectly to consumers and product packaging can only be seen from the visual form on the image, it is also sufficient to give an impression to consumers, although these aspects are not as important as product quality and delivery.

There are several strategies that can be implemented to increase the competitiveness of local products against imported products as implicated by this paper. First, given the positive public sentiment towards local products compared with imported products, it is imperative that local producers and sellers exploit this advantage against imported products. The e-commerce consumers should be aware of the risks involved in choosing imported products which might result in lower satisfaction than choosing local products. The Indonesian government alongside with the media should utilize this positive sentiment to promote national merchandises so that consumers prefer those of local than those of out of country (Khairani & Abdillah, 2018; E. Setiawan, 2014; Soegiono, 2012).

Second, the Indonesian government along with online shopping applications and education institutions should promote local producers and sellers to strengthen the later parties' existence online and collaborate to optimize e-commerce, to increase sales, to copywriting effectively, to stage products, and to deliver service excellence through the applications. These skills are mainly important to share to local producers and sellers so that they can compete with foreign parties. Research in the area of consumer behaviors of online shopping is valuable to share to practitioners as to entice online purchase intentions (Akar & Nasir, 2015; Thomas et al., 2017; Yen, 2014; Zhu et al., 2019).

Third, the Indonesian government must enforce the law on e-commerce platforms. This regulation is aimed to create a level playing field between imported and local products (Rumata, 2016; Simanjuntak, 2019), materialize potential tax revenue as well as control excessive online import (S. Setiawan, 2018), and nourish local firm's ability to thrive (Wulandari, 2012). In the beginning, the Indonesian government should emphasize on socialization and education actions. The enforcement measures should be stricter and tougher yet evaluated over time. This monitoring of law enforcement is essential to make sure that the trade protection measures do not backfire in such a way that they impede firm's performance (Narjoko et al., 2018)

Fourth, the statistics bureau ought to have the right to collect data of imported products circulating in the domestic electronic market so that imported products can be monitored by the government and by the public. This move is prominent for future research in e-commerce because statistics bureau is a deliberate source of data and its lacking of e-commerce data truly dwindle its capacity to provide relevant updated data and fill the e-commerce data gap. In the U.S. where e-commerce started to flourish two decades ago, the census bureau initiated the e-commerce database by defining the scope of e-commerce, adding inquiries, and tabulating statistics that are proven to determine the relative size of e-commerce to total economy (Murphy & Baer, 2017; Tehan, 2002).

Last, local producers and sellers should be able to stage their product advantages against imported products comprising thoughtful service, fastest delivery, and standardized quality. These parties also ought to adjust to market trends as to spark innovation and new creative ideas (See strategies on SWOT analysis above). The authors believe that above strategies, when implemented effectively, will improve the competitiveness of Indonesian products against imported products in the future.

4. Conclusions

The penetration rate of imported products on e-commerce platforms in Indonesia is quite high, especially in the two product categories, namely the cosmetics or beauty product category and electronic accessories product category are at 66 percent and 58 percent respectively. However, for one product category, namely clothing, the penetration rate of imported products is 40 percent. This study found the market share of imported products in each product category based on such a big data that has never been done in previous research other than estimates which marks this article's most significant contribution to the literature in the field of cross border e-commerce in Indonesia. This study calls for further research for estimating the trend of penetration rate of imported products on e-commerce and for validating and extending the methodology for this research.

Positive reviews of local products are higher than imported products in all product categories. Thus, local producers and sellers should feel proud of their performance in servicing e-commerce consumers. Based on product reviews, this research found that the aspects of quality and delivery are the most important things for customers when buying online. These findings stimulate strategies that can be implemented to increase the competitiveness of local products against imported products. First, it is imperative that local producers and sellers exploit the positive public sentiment towards local products against imported products. Second, the Indonesian government along with online shopping applications and education institutions should promote local producers and sellers to strengthen the later parties' existence online. Third, the Indonesian government must enforce the law on e-commerce platforms. Fourth, the statistics bureau ought to have the right to collect data of imported products circulating in the domestic electronic market so that imported products can be monitored by the government and by the public. Last, local producers and sellers should be able to stage their product advantages against imported products comprising thoughtful service, fastest delivery, and standardized quality. The authors believe that above strategies, when implemented effectively, will improve the competitiveness of Indonesian products against imported products in the future.

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