Consumer Preferences on Shallot

YBTS - vegIMPACTNL

BOI Research

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vegIMPACTNL

Consumer preferences on shallot report index

General

- Research background
- Research methodology

Consumer research

- General shop behavior
- Shallot shop. behavior
- Product evaluation

Middleman research

- Explainer
- Supply chain
- Shallot perception
- Product evaluation

Research Background

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- Shallot are mostly produced in Java (75%)
- Production has been steadily growing in the last few years from around 1.000.000 tonnes in 2013 to 1.500.000 in 2018.
- The market is characterised by existence of many producers and relatively few traders, or in other words an oligopsony.
- Demand for shallots in Indonesia increases in line with the trend of population growth.
- Based on Susenas (2019), the consumption of shallot keeps on increasing. In 2021, shallot consumption is expected to reach 876.479 tonnes by 2021.
- Production on the other hand can fluctuate based on changes in weather and market conditions of other (more attractive) agricultural products.
- Demand changes during annual national holidays like Idul Fitri. Like with many agricultural products, Indonesia needs to import shallots to meet demand of the local market.

Shallot consumption in Indonesia

	Consumption (kg/capita)	Population	National consumption (ton)
2018	2.81	265,015,300	745,488
2019	2.86	267,974,200	765,334
2020*)	3.16	271,066,400	856,671
2021*)	3.2	273,984,400	876,479

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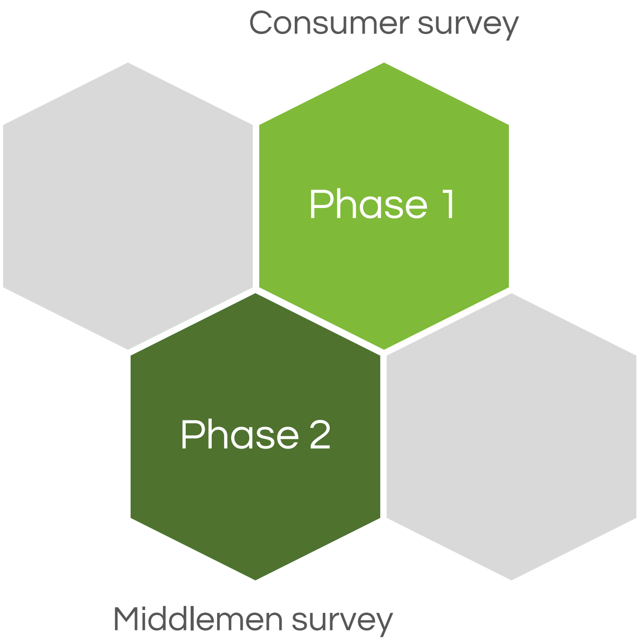
Research Methodology



Consumer Survey

- Quantitative & Face-to-Face
- Computer-assisted personal interviewing (CAPI)
- Intercept at Greater Jakarta
  - Traditional markets
  - Local supermarkets
  - High-end supermarkets

Middlemen Survey

The **Middlemen survey** is

- In-depth interview
- Pasar Induk and Secondary market of Greater Jakarta area

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Respondents Profile

base: all, n=280

Gender

Male	14%
Female	86%

Spending

> 8 million	18%
4 – 8 million	42%
< 4 million	40%

Intercept location

Traditional market	41%
Local supermarket	33%
High-end supermarket	25%

Age

18 – 24	12%
25 – 35	27%
35 – 44	33%
45 – 50	27%

Area

North Jakarta	11%
West Jakarta	15%
East Jakarta	11%
Central Jakarta	8%
South Jakarta	22%
Tangerang	8%
Bekasi	13%
Depok	13%

Decision-maker

Always choose by myself	88%
Often get help from seller	9%
Often get help from others	3%

Market Place

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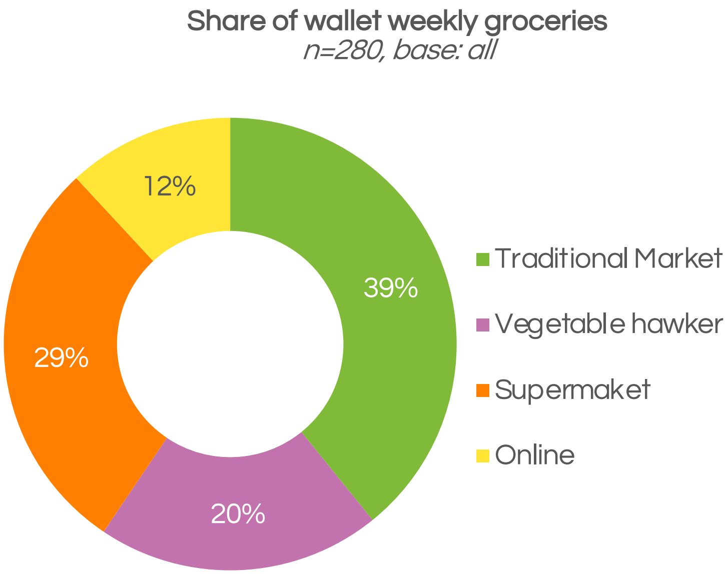
Traditional market	Supermarket	High-end supermarket
 		 

General Shopping Behavior



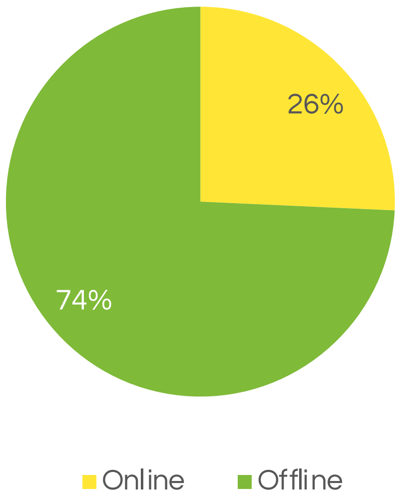
Groceries spending
n=280, base: all

	Total	> 8 million	4 – 8 million	< 4 million
Traditional Market	Rp 251,184	Rp 226,061	Rp 259,679	Rp 250,280
Vegetable hawker	Rp 129,920	Rp 115,688	Rp 128,053	Rp 136,208
Supermarket	Rp 183,739	Rp 382,258	Rp 180,577	Rp 124,899
Online	Rp 76,288	Rp 297,297	Rp 39,806	Rp 26,629

SD3. How much is your weekly spending for shopping at these following places?

Online Groceries Behavior

Groceries habit after COVID19
n=280, base: all

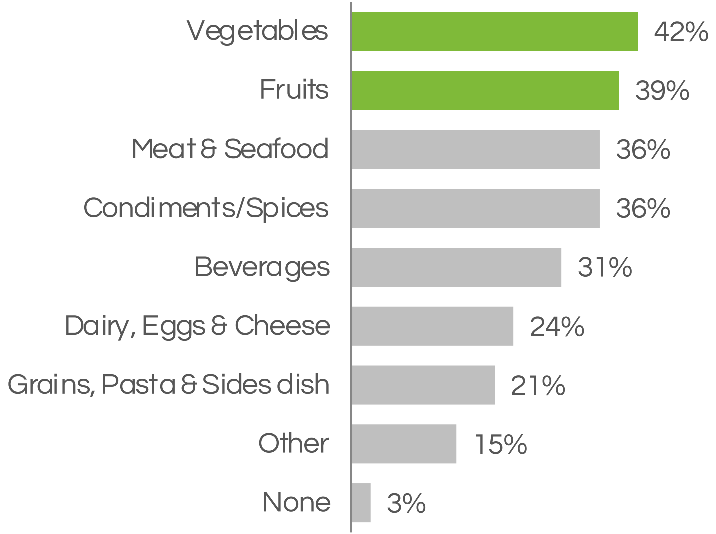


Frequencies of online groceries
n=72, base: respondents who bought the groceries online

Before COVID 19 2,4 times

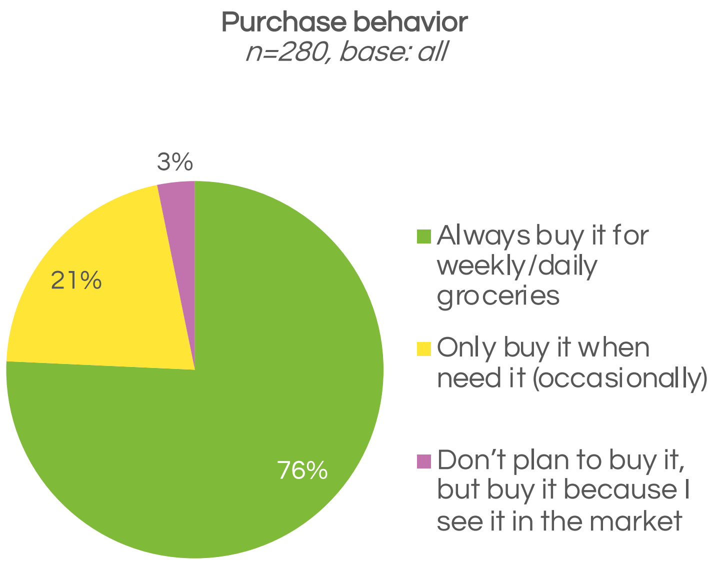
During COVID 19 3,9 times

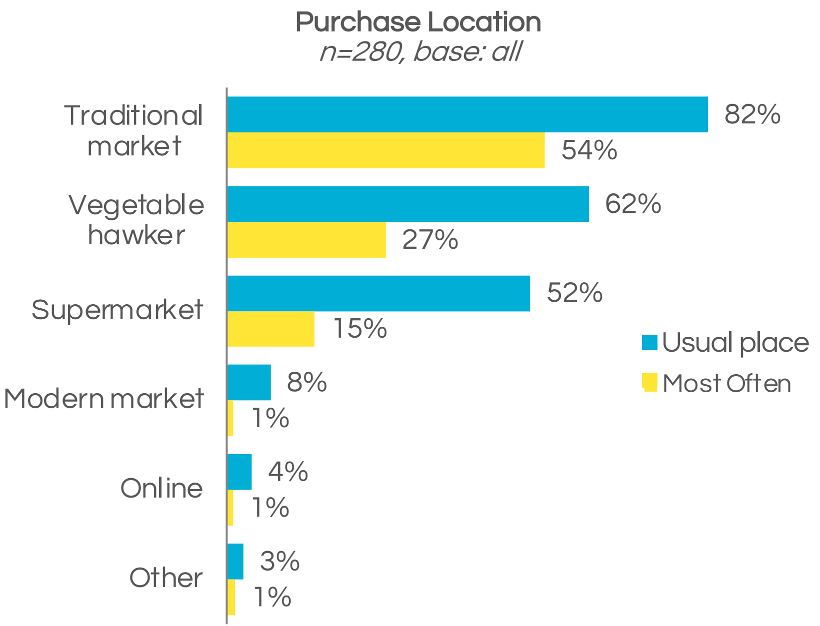
Groceries bought online
n=280, base: all



Q20. Do you buy groceries online after COVID 19?
Q20a. How many times have you buy groceries online for a month?
Q20c. What groceries you usually buy online?

Shallot Shopping Behavior (1)

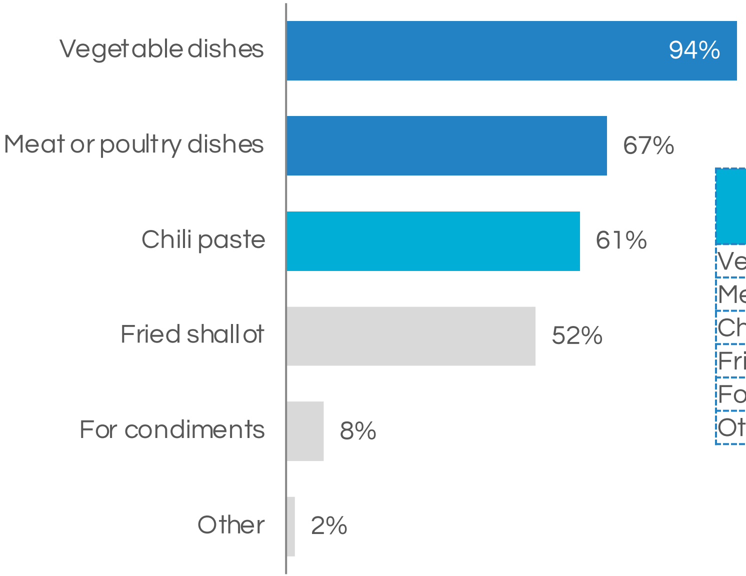




Q5. Which of these statements describe your habit on shallot purchase?
Q8a. Where do you usually buy the shallots?
Q8b. Where do you buy shallots most often?

Shallot Usage (1)

Shallot usage
n=280, base: all



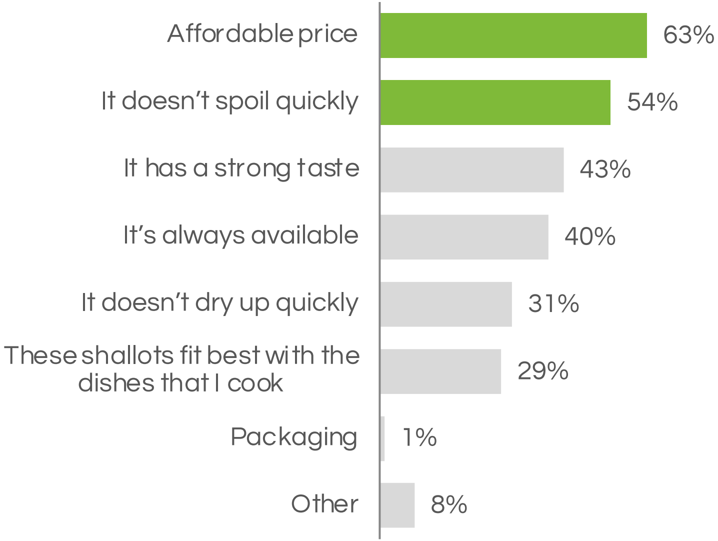
Shallot usage by purchase location – most often
n=280, base: all

	Total	Traditional Market	Vegetable Hawker	Modern market	Supermarket	Online	Other
Vegetable dishes	94%	98%	88%	67%	93%	100%	100%
Meat or poultry dishes	67%	70%	67%	0%	64%	33%	75%
Chili paste	61%	64%	63%	33%	45%	100%	75%
Fried shallot	52%	51%	62%	67%	43%	0%	25%
For condiments	8%	7%	5%	0%	17%	33%	0%
Other	2%	1%	1%	0%	5%	0%	0%

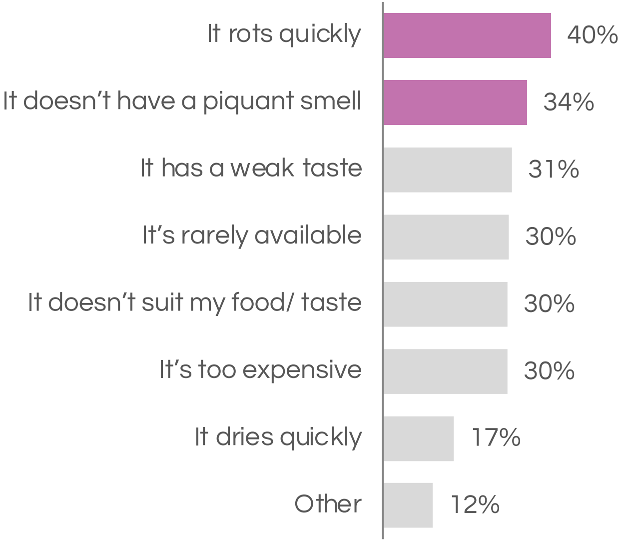
Q4. For what purpose did you use these shallots [Q3:_____________]?

Drivers and Barriers

Drivers
n=280, base: all

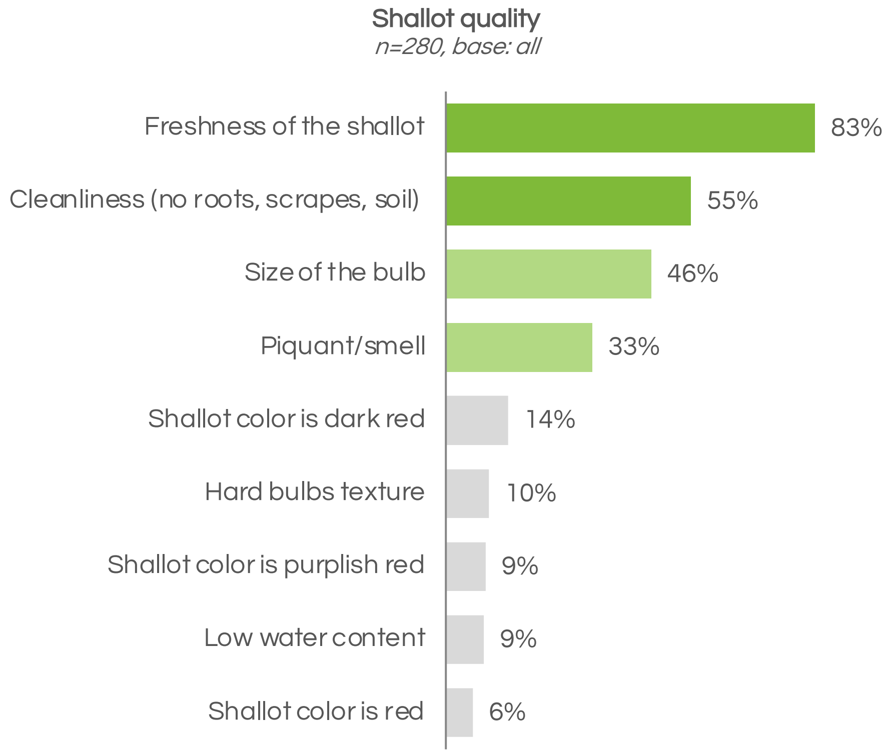


Barrier
n=280, base: all



Q10 Why did you choose this type of shallot?
Q11 What would be reasons not to buy a type of shallot?

Shallot Quality (1)



Q9. In general, what are the three most important criteria you use to check the quality of the shallots?

Shallot Association

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Maintained	Change with priority	Nice to have	Change
The red color (good, bright, fresh, attractive) The shallot scent (spicy/strong/fragrant)	The shallot scent is not spicy/strong/fragrant enough	Commonly found/used/cooked Easy to slice/peel Fresh	High water content Taste is not spicy/strong/ fragrant/savory enough

Product Uniqueness

Piquant/small

Size of the bulb

Freshness

Shallot color

Uniqueness of shallot is perceived as fresh, medium size, and piquant.

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- Research methodology
- Summary & Way forward

Consumer research

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Middleman research

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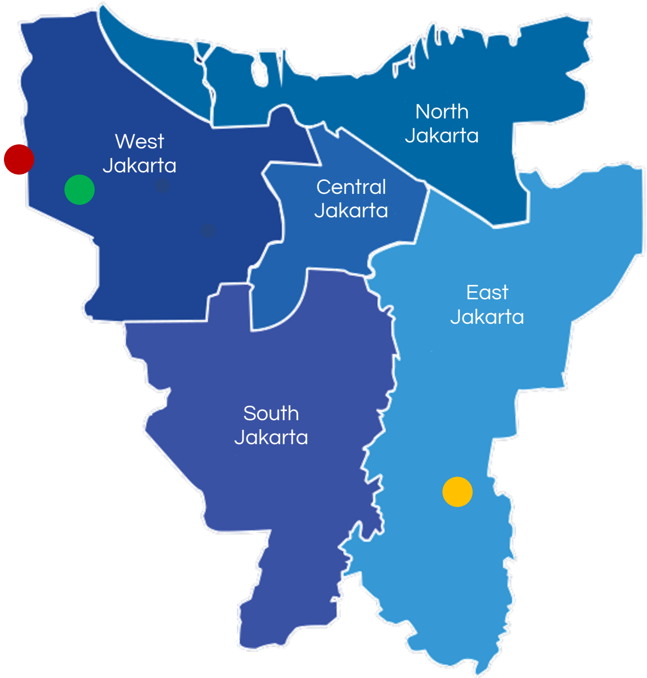
Respondents Profile: Qualitative

base: all, n=18



IDI location

Kramat Jati	11
Tanah Tinggi	4
Jelambar	3

Middleman type

Shallot shipper	2
Big bandar	4
Small bandar	4
Centeng	6

Gender

Male	16
Female	2

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Middlemen

mi-dᵊl-ˌman

: an intermediary or agent between two parties

especially: a dealer, agent, or company intermediate between the producer of goods and the retailer or consumer

(Merriam Webster, 2020)

Middlemen type

Shallot Supplier

Middlemen who buy shallots from farmers who in turn sell them to middlemen in *pasar induk.*

Big *bandar*

Bandar besar is an agent who gets shallot directly from suppliers.

Big *bandar* are **intermediaries** between small bandar, centeng and suppliers.

Small *bandar*

Small *bandar* gets shallot from big *bandar* and in turn sells them to centeng/reseller.

Shallot are usually distributed to reseller in type B and type C traditional market

Centeng

Centeng are middlemen who get their supply from the *bandar.*

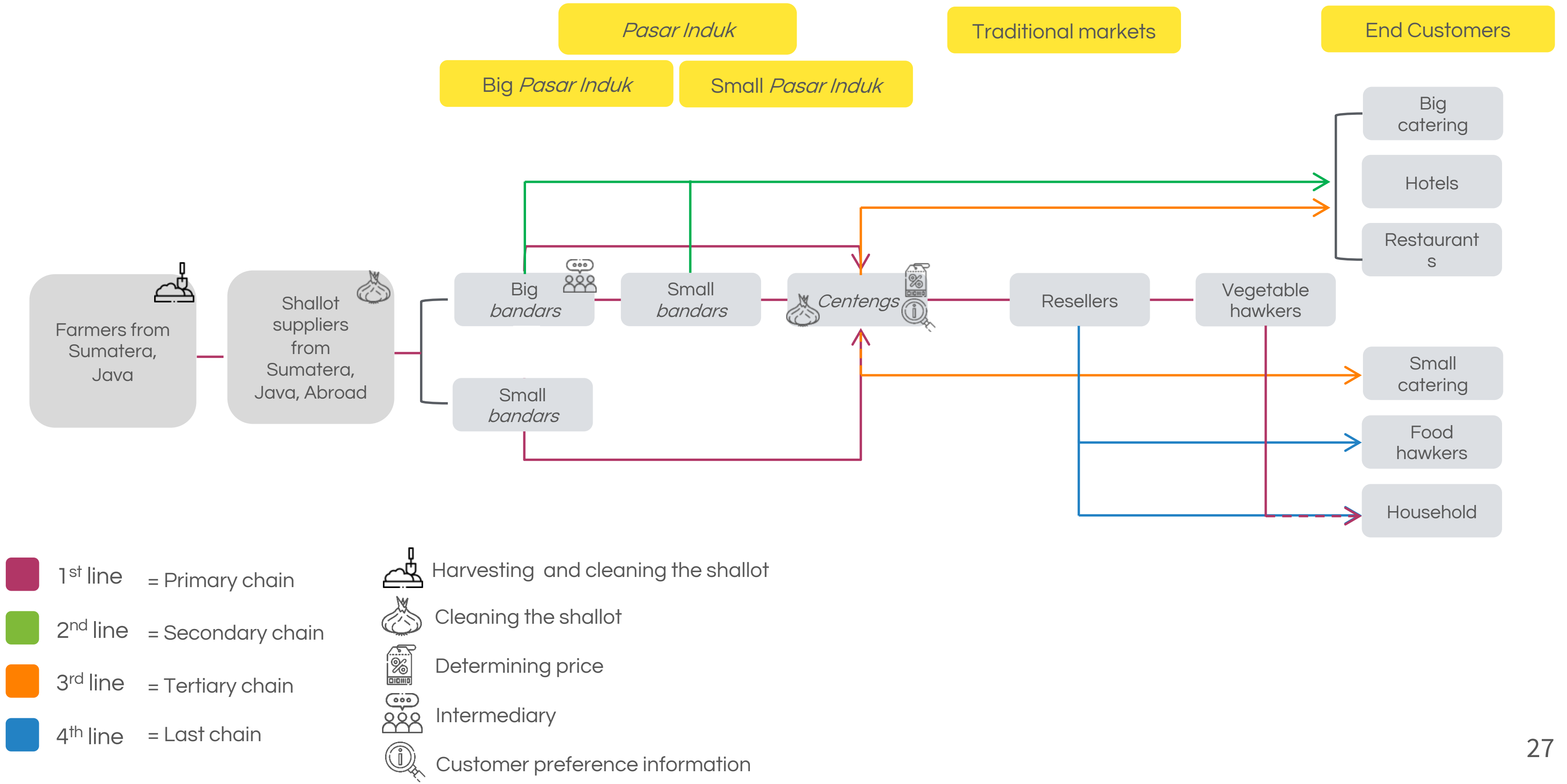
Centeng usually sells shallots to vegetable hawkers and resellers in all types of traditional markets.

Reseller

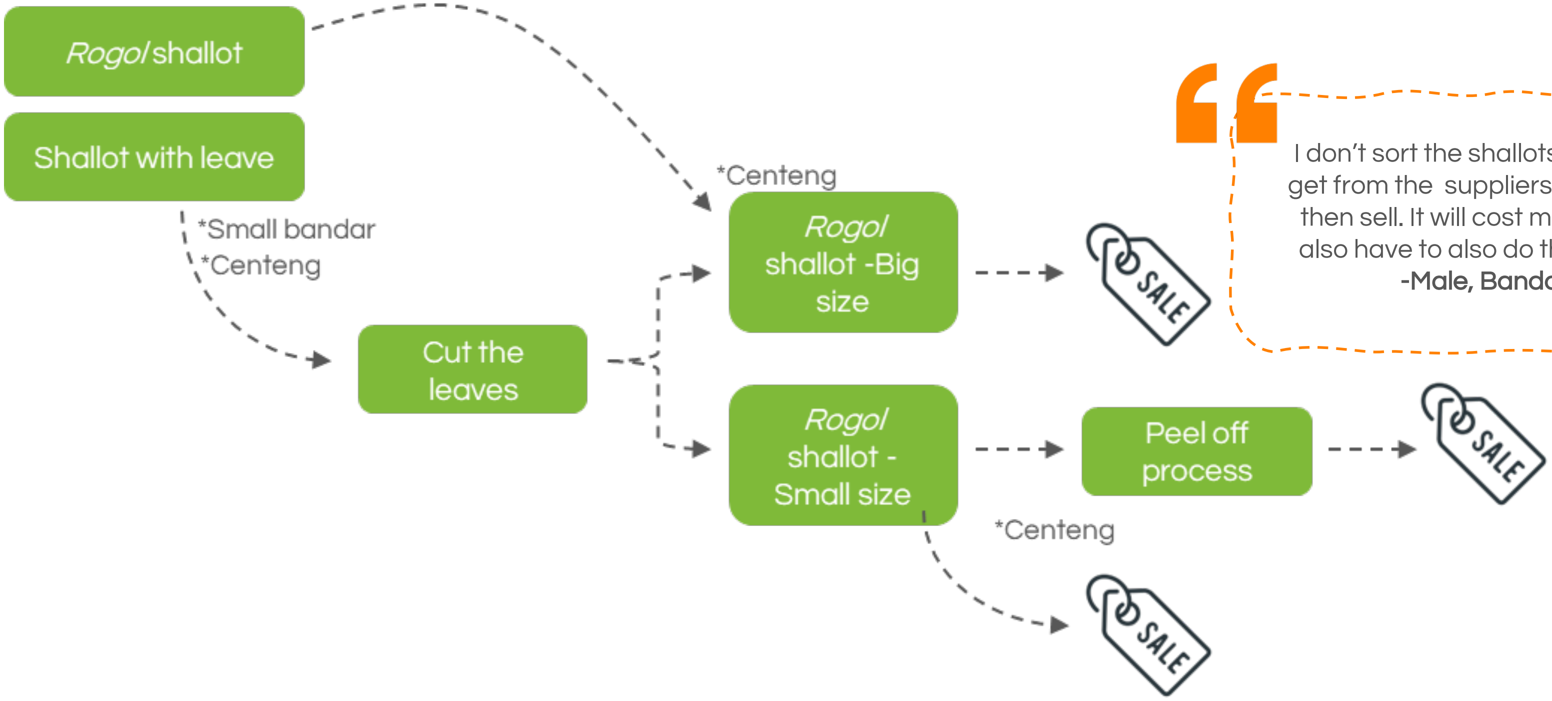
Reseller are the last line of middlemen who usually sell shallots in type C and D traditional markets.

Resellers sell shallots to household buyers and food businesses.

Supply Chain



Sorting Process of Shallot



“

I don’t sort the shallots. What we get from the suppliers is what we then sell. It will cost money if we also have to also do the sorting.
-Male, Bandar

Shallot Type (1)

Rogol shallot

Shallots where the leaves have been cleaned by the farmers or 1st hand suppliers.

Shallot with leaves

Shallots that still have leaves and dirt, and usually are still damp.

Cleaned shallot

Rogol shallots that have gone through the drying process and cleaned from dirt and roots.

Mixed Shallot

Mixed shallots, usually a mix of Brebes and other variant (aimed to lower the price), usually found at *centeng*.

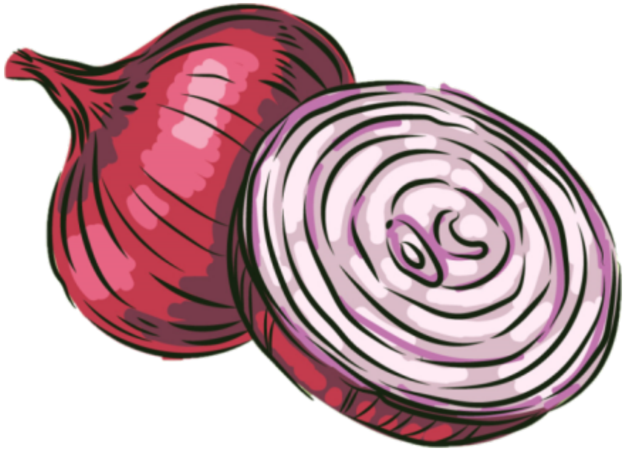
Unsorted shallots

Unsorted shallots come in various sizes, usually packaged in sacks.

Bawang kupas

Peeled shallots (usually mid- or smaller-sized shallots), often distributed for resellers in traditional markets.

Shallot quality by middlemen



Size

Medium size
Big size

Color

Bright red, purplish → like Brebes

Shape

Round
Oval pointy in the top

Scale (leaf bases)

Thin

Smell

Fragrant
Sharp

Shallot type preferences

Rogol shallot
Shallot with leaves (cheaper and considered fresher)
Not damp

Price

Cheap

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Q&A

Ask away

Q&A

Ask away

Thank you!

Contact us

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