

**VALUE CHAIN MAPPING OF NON-TIMBER FOREST
PRODUCTS (NTEPs) PALM SUGAR BUSINESS
IMPROVEMENT UNDER THE STRENGTHENING OF
SOCIAL FORESTRY (SSF) PROJECT IN LIMA PULUH KOTA
REGENCY, WEST SUMATRA**

BY



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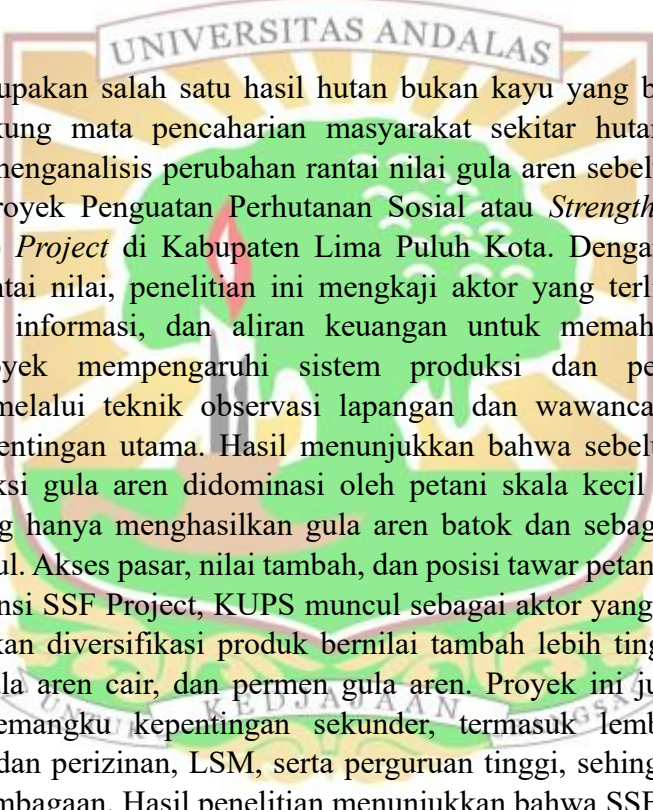
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PEMETAAN RANTAI NILAI HASIL HUTAN BUKAN KAYU (HHBK) DALAM PENINGKATAN USAHA GULA AREN DIBAWAH PROYEK PENGUATAN PERHUTANAN SOSIAL (SSF) DI KABUPATEN LIMA PULUH KOTA, SUMATRA BARAT

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ABSTRAK



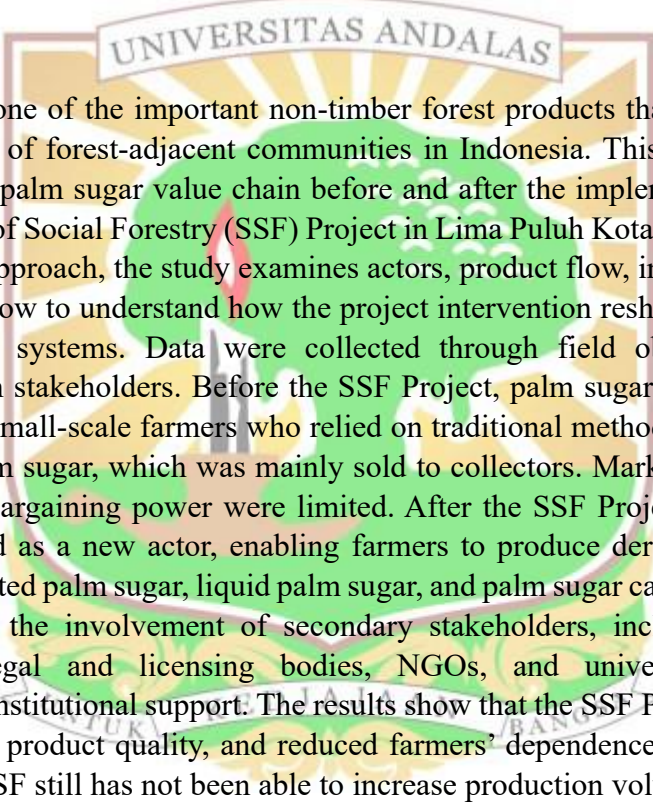
Gula aren merupakan salah satu hasil hutan bukan kayu yang berperan penting dalam mendukung mata pencaharian masyarakat sekitar hutan di Indonesia. Penelitian ini menganalisis perubahan rantai nilai gula aren sebelum dan sesudah pelaksanaan Proyek Penguatan Perhutanan Sosial atau *Strengthening of Social Forestry* (SSF) Project di Kabupaten Lima Puluh Kota. Dengan menggunakan pendekatan rantai nilai, penelitian ini mengkaji aktor yang terlibat serta aliran produk, aliran informasi, dan aliran keuangan untuk memahami bagaimana intervensi proyek mempengaruhi sistem produksi dan pemasaran. Data dikumpulkan melalui teknik observasi lapangan dan wawancara dengan para pemangku kepentingan utama. Hasil menunjukkan bahwa sebelum adanya SSF Project, produksi gula aren didominasi oleh petani skala kecil dengan metode tradisional yang hanya menghasilkan gula aren batok dan sebagian besar dijual kepada pengepul. Akses pasar, nilai tambah, dan posisi tawar petani masih terbatas. Setelah intervensi SSF Project, KUPS muncul sebagai aktor yang memungkinkan petani melakukan diversifikasi produk bernilai tambah lebih tinggi, seperti gula aren semut, gula aren cair, dan permen gula aren. Proyek ini juga memperluas keterlibatan pemangku kepentingan sekunder, termasuk lembaga keuangan, lembaga legal dan perizinan, LSM, serta perguruan tinggi, sehingga memperkuat dukungan kelembagaan. Hasil penelitian menunjukkan bahwa SSF Project mampu meningkatkan nilai tambah produk, kualitas produk, serta mengurangi ketergantungan petani terhadap tengkulak. Namun demikian, SSF belum mampu meningkatkan produksi dan memperluas pasar petani dikarenakan strategi pemasaran yang belum maksimal. Secara keseluruhan, SSF Project berkontribusi dalam membangun rantai nilai gula aren yang lebih inklusif dan berkelanjutan, meskipun tantangan dalam tata kelola, koordinasi, strategi pemasaran yang lebih mendalam, dan keberlanjutan jangka panjang masih perlu diatasi.

Kata kunci: *Perhutanan Sosial, Gula Aren, Rantai Nilai, Proyek SSF*

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ABSTRACT



Palm sugar is one of the important non-timber forest products that contributes to the livelihoods of forest-adjacent communities in Indonesia. This study analyzes changes in the palm sugar value chain before and after the implementation of the Strengthening of Social Forestry (SSF) Project in Lima Puluh Kota Regency. Using a value chain approach, the study examines actors, product flow, information flow, and financial flow to understand how the project intervention reshaped production and marketing systems. Data were collected through field observations and interviews with stakeholders. Before the SSF Project, palm sugar production was dominated by small-scale farmers who relied on traditional methods and produced only block palm sugar, which was mainly sold to collectors. Market access, value addition, and bargaining power were limited. After the SSF Project intervention, KUPS emerged as a new actor, enabling farmers to produce derivative products such as granulated palm sugar, liquid palm sugar, and palm sugar candy. The project also expanded the involvement of secondary stakeholders, including financial institutions, legal and licensing bodies, NGOs, and universities, thereby strengthening institutional support. The results show that the SSF Project improved value addition, product quality, and reduced farmers' dependence on middlemen. Despite that, SSF still has not been able to increase production volume and expand market access for farmers due to an insufficient marketing strategy. Overall, the SSF Project has contributed to a more inclusive and resilient palm sugar value chain, though challenges remain in governance, coordination, marketing strategy to reach broader markets, and long-term sustainability.

Keywords: *Social Forestry, Palm Sugar, Value Chain Mapping, SSF Project*