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Enhancing Broiler Feed Market Share in Jabodetabek: An Importance–Performance Analysis Approach

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Abstract. This study aims to formulate a market share enhancement strategy for broiler feed in the Jabodetabek region using Importance-Performance Analysis (IPA). A survey was conducted with 68 PT NH customers in the Jabodetabek region as respondents. Data were analyzed using descriptive statistics and IPA. The results indicated that competitive pricing (Gap: +1.25), distribution availability (Gap: +1.20), and feed variety (Gap: +0.51) were the key priority attributes requiring improvement. In contrast, after-sales service, feed quality, and nutritional content were in the "Keep Up the Good Work" quadrant. The strategic recommendations derived from the IPA mapping include price restructuring through volume-based discounts and price matching guarantees, distribution network optimization through buffer stock points in Bekasi and Bogor with real-time inventory tracking, and product portfolio expansion through specialized formulations for different broiler growth phases. The implementation of these strategies, prioritizing resource reallocation from low-impact Quadrant D attributes (promotion programs) to critical Quadrant A attributes, is projected to increase market share by 15–20 percent through improved customer satisfaction while simultaneously reducing unnecessary promotional expenditures. This study fills three critical gaps in existing literature: (1) the absence of integrated multi-attribute analysis in feed marketing research, which has previously focused on single factors such as price or distribution in isolation; (2) the lack of attention to the unique logistical and operational characteristics of the Jabodetabek market, which differ fundamentally from other Indonesian regions; and (3) the limited attempts of previous studies to translate diagnostic IPA results into measurable, actionable implementation strategies with specific targets and timelines, rather than generic recommendations. The novelty of this research lies in its integration of IPA diagnostic results with concrete, time-bound strategic programs tailored specifically to the Jabodetabek context, combined with external market dynamics such as the 2026 soybean meal import policy shift and increasing competition from state-owned feed mills. Together, these contributions provide feed companies with a customer-centric, evidence-based framework for competitive positioning in Indonesia's most challenging poultry feed market.

Keywords: market share, broiler feed, importance-performance analysis, customer satisfaction, marketing strategy

Abstrak. Penelitian ini bertujuan untuk merumuskan strategi peningkatan pangsa pasar pakan broiler di wilayah Jabodetabek menggunakan metode Importance-Performance Analysis (IPA). Survei dilakukan terhadap 68 pelanggan PT NH di wilayah Jabodetabek sebagai responden. Data dianalisis menggunakan statistik deskriptif dan IPA. Hasil penelitian menunjukkan bahwa harga yang kompetitif (Gap: +1,25), ketersediaan distribusi (Gap: +1,20), dan variasi pakan (Gap: +0,51) merupakan atribut prioritas utama yang memerlukan perbaikan. Sebaliknya, layanan purna jual, kualitas pakan, dan kandungan nutrisi berada pada kuadran "Pertahankan Prestasi". Rekomendasi strategis yang dihasilkan dari pemetaan IPA meliputi restrukturisasi harga melalui diskon berbasis volume dan jaminan penyesuaian harga, optimalisasi jaringan distribusi melalui titik stok penyangga di Bekasi dan Bogor dengan pelacakan inventaris secara real-time, serta perluasan portofolio produk melalui formulasi khusus untuk berbagai fase pertumbuhan broiler. Implementasi strategi-strategi tersebut, dengan memprioritaskan realokasi sumber daya dari atribut Kuadran D yang berdampak rendah (program promosi) ke atribut kritis Kuadran A, diproyeksikan dapat meningkatkan pangsa pasar sebesar 15–20 persen melalui peningkatan kepuasan pelanggan sekaligus mengurangi pengeluaran promosi yang tidak diperlukan. Penelitian ini mengisi tiga kesenjangan kritis dalam literatur yang ada: (1) tidak adanya analisis multi-atribut terintegrasi dalam penelitian pemasaran pakan, yang sebelumnya hanya berfokus pada faktor tunggal seperti harga atau distribusi secara terpisah; (2) kurangnya perhatian terhadap karakteristik logistik dan operasional unik pasar Jabodetabek, yang secara fundamental berbeda dari wilayah Indonesia lainnya; dan (3) terbatasnya upaya penelitian terdahulu dalam menerjemahkan hasil diagnostik IPA menjadi strategi implementasi yang terukur dan dapat ditindaklanjuti dengan target dan jadwal yang spesifik, alih-alih rekomendasi yang bersifat generik. Kebaruan penelitian ini terletak pada integrasinya antara hasil diagnostik IPA dengan program strategis yang

konkret dan terikat waktu, yang dirancang khusus untuk konteks Jabodetabek, dikombinasikan dengan dinamika pasar eksternal seperti perubahan kebijakan impor bungkil kedelai tahun 2026 dan meningkatnya persaingan dari pabrik pakan milik negara. Secara keseluruhan, kontribusi-kontribusi ini memberikan kepada perusahaan pakan sebuah kerangka kerja yang berpusat pada pelanggan dan berbasis bukti untuk positioning kompetitif di pasar pakan unggas Indonesia yang paling menantang.

Kata kunci: pangsa pasar, pakan broiler, *Importance-Performance Analysis*, kepuasan pelanggan, strategi pemasaran

Introduction

The broiler farming sector has experienced significant growth over the past decade. According to BPS (2022), the broiler population reached 3,114,027,615 heads, reflecting increasing demand for poultry meat driven by population growth, urbanization, and changing consumption patterns (Dudin et al., 2025). The Jabodetabek region (Jakarta, Bogor, Depok, Tangerang, Bekasi) serves as Indonesia's largest poultry production center, contributing approximately 35% of national broiler production (Ministry of Agriculture, 2023) and functioning as a major feed trade hub characterized by high competition among feed brands and diverse broiler farmer populations (Dudin et al., 2025).

This region presents five distinctive characteristics that fundamentally differentiate it from other Indonesian poultry regions, such as East Java or Central Java. First, its extreme population density (±30 million) combined with severe traffic congestion creates a logistics environment where reliability often outweighs speed (World Population Review, 2026). Second, the farm structure is dominated by independent farmers who are fully exposed to market price fluctuations. Third, high operational costs (including land, labor, and utilities) drive extreme price sensitivity, with farmers operating on thinner margins than their regional counterparts. Fourth, distribution effectiveness is determined by cluster depth (local availability) rather than geographic breadth. These characteristics mean that marketing strategies proven effective in other regions cannot be directly replicated without contextual adaptation. Market research in this context is therefore critical for understanding consumer behavior, predicting market needs, and identifying product gaps for long-term growth (Dudin et al., 2025).

PT NH, as an established player in this market, faces significant challenges in increasing its market share amid fierce competition. Previous studies have explored relevant dimensions of feed marketing: Sari et al. (2023) identified price and quality as primary drivers of farmer satisfaction in East Java; Chen and Wang (2022) highlighted distribution efficiency as a key market share determinant in Taiwan; Addinna et al. (2018) revealed that market leadership in major Indonesian feed companies is achieved through product quality, efficient distribution, and professional human resources; and more recent studies have examined value chain profitability (Jayadi and Latief, 2023), green supply chain sustainability (Muslim et al., 2024), and technical efficiency among independent broiler farmers, confirming feed as a dominant determinant of output (Lokden et al., 2025).

Despite these advances, the existing literature exhibits three critical gaps. First, most studies focus on single attributes (price, quality, or distribution in isolation) rather than offering integrated multi-attribute analysis. Second, research has largely overlooked the unique logistical and operational characteristics of the Jabodetabek market, which create fundamentally different marketing requirements compared to other Indonesian regions. Third, while some studies apply analytical tools such as core competency frameworks or value chain analysis, none have integrated Importance-Performance Analysis (IPA) with concrete, actionable strategy

formulation that includes measurable targets and timelines specifically for urban poultry feed markets.

This study addresses these gaps by applying IPA to the Jabodetabek broiler feed market, with four specific objectives: (1) to identify and map the profile and characteristics of broiler farmers in the Jabodetabek region; (2) to analyze the determining factors influencing broiler feed purchase decisions; (3) to measure farmer satisfaction levels across various product and service attributes and identify gaps between importance and performance; and (4) to formulate a market share enhancement strategy for PT NH based on the analysis of broiler farmers' needs and preferences.

Materials and Methods

The research was conducted from January to December 2025, covering a full one-year period to capture market dynamics across different seasonal conditions, including variations in feed demand, purchasing behavior, and marketing performance influenced by weather conditions, farming trends, and broiler production cycles. The study was located in the Jabodetabek region (Jakarta, Bogor, Depok, Tangerang, and Bekasi), selected because it represents one of Indonesia's largest poultry industries and feed trade centers, characterized by high competition among feed brands, complex distribution patterns, and diverse broiler farmer populations ranging from small to large-scale operations.

Sample and Sampling Technique

The research population consisted of all active customers of PT NH in the Jabodetabek region who regularly purchase broiler feed products, with purchase histories spanning at least six months before the study period. Based on company records, this accessible population totaled approximately 120 customers meeting the minimum purchase volume threshold of >10 tons/month.

Using purposive sampling, 68 respondents were selected (54 independent farmers and 14 poultry shop owners/managers), representing 56.7% of the accessible population. The primary selection criterion was a minimum purchase volume of >10 tons/month, consistent with the minimum threshold for direct factory pickup from PT NH, ensuring that respondents were active users whose assessments of product, price, distribution, and service attributes reflect meaningful business relationships with the company. A secondary criterion required a minimum farm capacity of 3,000 birds.

The sample size of 68 respondents is justified on four grounds. First, it represents 56.7% of the total accessible population of 120 active customers, which is considered a high representation rate for business-to-business research. Second, for purposive sampling, sample sizes of 30–100 are considered adequate when respondents are carefully selected based on specific criteria (Hair et al., 2019), as the technique prioritizes respondent quality and relevance over quantity. Third, comparable studies in feed marketing research have used similar sample sizes: Sari et al. (2023) used 72 respondents in East Java, and Lokden et al. (2025) used 60 independent farmers in Sorong. Fourth, data saturation was confirmed when responses became consistent, and no new patterns emerged, indicating that additional respondents would not yield significantly different insights.

Research Design

This study employed a non-experimental research design combining descriptive and verificative approaches. The descriptive approach was used to profile broiler farmers and measure their satisfaction levels, while the verificative approach tested the relationship between strategy implementation and sales growth. The analytical framework applied was Importance-Performance Analysis (IPA), in which each attribute was assessed across two dimensions as summarized in Table 1.

Table 1. Comparison of performance and importance metrics

Metrics	Parameter Measured	Scale
Performance Level - Mean Performance (MP)	The company's actual performance (How well the company performs on that attribute)	1-5 (Satisfaction)
Importance Level - Mean Importance (MI)	Attribute importance level (How important the attribute is in purchase decisions)	1-5 (Importance)

Table 2. The measured attributes covered five main groups representing the marketing mix in the animal feed industry context

Attribute Group	Specific Attributes
Price	Price level, price stability, payment flexibility, discount programs
Place (Distribution)	Delivery timeliness, stock availability, distribution reach, and product condition upon receipt
After-Sales Service	Complaint responsiveness, technical support, and salesperson competence
Product Variety	Completeness of product variants according to broiler growth phases
Product Quality	Quality consistency, nutritional content, cleanliness, and packaging strength

Table 3. Likert scale interpretation for importance and performance dimensions

Scale Point	Importance Interpretation	Performance Interpretation
1	Very Unimportant	Very Poor
2	Unimportant	Poor
3	Moderately Important	Moderate
4	Important	Good
5	Very Important	Very Good

Data Collection

Primary data were collected through a structured questionnaire comprising 52 items in two sections: Section A (8 demographic and profile questions) and Section B (44 attribute assessment questions). Section B covered 22 attributes, each measured on both Importance and Performance dimensions, grouped into four marketing mix categories: Product (5 attributes, 10 items), Price (5 attributes, 10 items), Distribution (5 attributes, 10 items), and Service (4 attributes, 8 items). All items used a 5-point Likert scale (1 = Very Unimportant/Very Poor; 5 = Very Important/Very Good). Secondary data included company sales reports and market share data. The specific attributes measured under each group are summarized in Table 2. All items used a 5-point Likert scale, with anchor points for each dimension presented in Table 3.

Data Analysis

Data were analyzed using four sequential techniques: (1) descriptive statistics to profile farmer characteristics and measure satisfaction levels through mean values, percentages, and frequency distributions; (2) Importance-Performance Analysis (IPA) to map each attribute based on customer-perceived importance and performance; (3) gap analysis (Importance minus Performance) to quantify discrepancies between expectations and delivery; and (4) strategic formulation based on IPA quadrant positioning.

In the IPA matrix, the grand mean of all MI scores serves as the vertical axis cutoff, and the grand mean of all MP scores serves as the horizontal axis cutoff, with each attribute plotted using MI (Y-axis) and MP (X-axis). This mapping produces four quadrants as described in Table 4. Then, the quadrant determination criteria were as follows:

- Grand mean of all MI scores = vertical axis cutting point
- Grand mean of all MP scores = horizontal axis cutting point
- Each attribute is plotted with MI (Y-axis) and MP (X-axis)

Table 4. The mapping produced four quadrants

Quadrant	Position	Interpretation
A (Concentrate Here)	High importance, Low performance	Top priority for improvement
B (Keep Up the Good Work)	High importance, High performance	Maintain as strengths
C (Low Priority)	Low importance, Low performance	Low priority for improvement
D (Possible Overkill)	Low importance, High performance	Consider reallocating resources

Results and Discussion

Customer Profile and Regional Distribution

The data reveal significant variations in farming operations across Jabodetabek, with distinct concentrations of small-, medium-, and large-scale operations in specific regions. These demographic factors influence purchasing behavior, service expectations, and price sensitivity, while the distribution patterns provide crucial insights for optimizing logistics networks, allocating sales resources, and designing region-specific marketing approaches.

The profile analysis shows that the Jabodetabek region is dominated by medium-scale farmers (55.88%) with strong partnership-system integration (54.41%), with notable clustering of medium- to large-scale operations in Bekasi and Bogor, and a higher concentration of small-scale farms in Depok. This finding aligns with Suryanto et al. (2023), who reported similar patterns in urban poultry farming systems. The high proportion of partnership systems indicates a need for tailored strategies that address the specific requirements of integrated supply chains and enable feed companies to optimize distribution and design region-specific service approaches.

Determinant Factors in Feed Selection

The importance-level analysis revealed that nutritional content (4.91) and after-sales service (4.84) were the most important factors, followed by competitive pricing (4.82) and feed quality (4.78).

IPA Analysis and Strategic Formulation

The findings are interpreted through Expectation-Disconfirmation Theory (EDT; Oliver, 1980), which holds that satisfaction is determined by the gap between prior expectations and perceived performance. Positive disconfirmation (performance exceeds expectations) produces satisfaction, while negative disconfirmation produces dissatisfaction. In this study, all attributes except one (product condition upon receipt, gap = –0.02) exhibited positive gaps (MI > MP), indicating negative disconfirmation across nearly all measured attributes. The largest gaps were observed for competitive pricing (+1.25), distribution availability (+1.20), and feed variety (+0.51). Because gap magnitude correlates with the intensity of dissatisfaction, the pricing gap (being the largest) suggests that price is the most critical driver of current dissatisfaction among Jabodetabek broiler farmers.

Table 5. Customer profile based on business scale and partnership system

Business scale	Number of farmers	Percentage	Partnership system		Independent system	
			n	%	n	%
Small scale (<3,000 birds)	14	20.59%	8	57.14%	6	42.86
Medium scale (3,000-10,000 birds)	38	55.88%	28	73.68	10	26.32
Large scale (>10,000 birds)	16	23.53%	11	68.75	5	31.25
Total	68	100%	47	69.12	21	30.88

Notes: n: number of farmers

Table 6. Geographical distribution of broiler farmers in Jabodetabek

Region	Number of Farmers	Business Scale			Partnership	
		Small	Medium	Large	n	Percentage
Jakarta	8	-	8	-	5	62.5%
Bogor	19	-	19	-	14	73.68%
Depok	7	7	-	-	4	57.14%
Tangerang	14	-	-	14	10	71.43%
Bekasi	20	-	20	-	4	20%
Total	68	7	47	14	37	54.41%

Notes: n: number of farmers; The overall partnership percentage is obtained by dividing the total number of farmers participating in partnerships by the total farmer sample

Table 7. Importance-performance analysis results

Attribute	Importance (MI)	Performance (MP)	Gap	Quadrant
Competitive Pricing	4.82	3.57	+1.25	A
Distribution Availability	4.71	3.51	+1.20	A
Feed Variety	4.32	3.81	+0.51	A
After-Sales Service	4.84	4.47	+0.37	B
Feed Quality	4.78	4.29	+0.49	B
Nutritional Content	4.91	4.41	+0.50	B

Quadrant A (Concentrate Here)

Competitive Pricing. This attribute shows the largest gap (+1.25), with very high importance (4.82) but only moderate performance (3.57), indicating that price competitiveness is extremely important to Jabodetabek broiler farmers, yet they are notably dissatisfied with current pricing. This gap can be explained through Transaction Cost Economics (Williamson, 1985). Farmers facing uncertain production outcomes seek to minimize procurement transaction costs, but in the Jabodetabek context of tight cycles and thin margins, price volatility and stock uncertainty raise these costs—forcing farmers either to hold costly inventory buffers or to risk production disruptions. The large pricing and distribution gaps indicate that PT NH has not adequately reduced these costs. Pushing farmers toward suppliers offering more predictable total delivered costs. Supporting research by Sari et al. (2023) found high price sensitivity among medium-scale broiler farmers in East Java, with competitive pricing as the main determinant of feed-brand selection. Rahman et al. (2023) confirmed that in B2B agricultural markets, price dissatisfaction is the primary cause of brand switching in highly competitive regions.

Distribution Availability. This attribute shows the second-largest gap (+1.20), with importance 4.71 and performance 3.51, indicating that while farmers consider reliable distribution critically important, they are notably dissatisfied with PT NH's current distribution services. Lee and Park (2023) reported that companies with real-time distribution tracking achieved 85% on-time delivery versus 58% for conventional systems. Chen and Wang (2022) identified distribution reliability as the most critical factor in customer retention in competitive markets.

Feed Variety. This attribute shows a moderate but significant gap (+0.51), with importance 4.32 and performance 3.81, indicating that farmers value product diversity but perceive PT NH's current portfolio as insufficient for their varied needs. Martinez et al. (2024) demonstrated the importance of product variety in competitive markets. Kumar and Reinartz (2022) found that diversified portfolios achieved 25% higher customer retention. Lee and Park (2023) found that feed companies offering phase-specific feeds reported 30% higher customer satisfaction.

Quadrant B (Keep Up the Good Work)

After-Sales Service. This attribute shows a small but significant gap (+0.37), combining the highest importance score (4.84) with strong performance (4.47). Farmers consider after-sales service extremely important, and PT NH performs well, though room for improvement

remains. The recommended strategy is to maintain service excellence through continuous improvement such as regular technical training for service staff, a structured customer feedback system, and preventive maintenance programs. Iskandar et al. (2023) found, in a study of PT Farmsco Feed Indonesia's B2B customers, that customer trust significantly affects loyalty. Gusrina and Hurriyati (2022) identified customer satisfaction as a key driver of repurchase intention in Indonesian poultry input markets, with salesperson affection the most important factor. Hui and Gun (2025) found that perceived quality and perceived value are critical drivers of loyalty among SME feed enterprises. Complementary evidence shows that comprehensive after-sales programs achieved 85% retention versus 65% for basic providers (Rodriguez et al., 2023), that after-sales quality raised willingness to pay a premium by 15–20% (White et al., 2022), and that service-quality improvements show diminishing returns beyond certain thresholds, favoring focused rather than broad-based strategies (Grewal et al., 2024).

Feed Quality. This attribute shows a moderate gap (+0.49), with high importance (4.78) and strong performance (4.29). Feed quality is a fundamental expectation, and PT NH's performance is commendable yet improvable. The recommended strategy is to strengthen quality-assurance systems through enhanced quality-control protocols, investment in laboratory testing equipment, and traceability systems.

Nutritional Content. This attribute shows a moderate gap (+0.50) and records the highest importance score among all attributes (4.91) alongside strong performance (4.41): nutritional content is paramount to farmers, and PT NH performs well, but a meaningful opportunity for enhancement remains. The recommended strategy is to continue nutritional RandD through collaboration with research institutions, regular formulation reviews, and investment in nutritional technology. Kumar and Reinartz (2022) emphasized continuous innovation in product development. Martinez et al. (2024) found that optimal nutritional formulation correlated with 25% higher farm-productivity metrics. White et al. (2022) found that scientific nutritional claims increased willingness-to-recommend by 35%.

Strategic Rationale for Limited Focus on Quadrant C and D Attributes

Quadrant C (Low Priority) Quadrant C contains attributes with below-average importance and below-average performance, indicating that these attributes are neither critical drivers of customer satisfaction nor urgent areas for concern. Based on the research findings, packaging-related attributes, specifically Clarity of Composition Information with MI of 3.40, MP of 3.41, and gap of -0.01, and Strong and Protective Packaging with MI of 3.34, MP of 3.37, and gap of -0.03, fall into this quadrant.

Table 8. Quadrant C attributes: Low priority

Category	Attribute Description	MI	MP	Gap (MI-MP)	Interpretation
Product	Clarity of Composition Information	3.40	3.41	-0.01	Performance slightly exceeds importance; minimal gap; not a priority
Product	Strong and Protective Packaging	3.34	3.37	-0.03	Performance exceeds importance; adequate service on a low-importance attribute
Price	Price-Quality Alignment	3.56	3.32	+0.24	Moderate gap but low importance; limited impact on satisfaction
Price	Discount and Bonus Programs	3.75	3.56	+0.19	Moderate gap but below-average importance; low priority
Price	Price Stability	3.78	3.65	+0.13	Small gap; low importance; not a primary driver
Distribution	Delivery Timeliness	3.74	3.71	+0.03	Minimal gap; performance meets expectations on low-importance attribute
Distribution	Wide Distribution Reach	3.38	3.34	+0.04	Very low importance and performance; minimal investment needed

Table 9. Quadrant D attributes: Possible overkill

Category	Attribute Description	MI	MP	Gap (MI-MP)	Interpretation
Price	Payment System Flexibility	3.88	3.84	+0.04	Performance slightly exceeds importance; acceptable but not critical
Distribution	Ease of Purchase Access	3.90	3.84	+0.06	Performance exceeds importance; good service on a non-critical attribute
Distribution	Feed Condition Upon Receipt	3.97	3.99	-0.02	Performance slightly exceeds importance (negative gap); over-delivery
Service	Beneficial Partnership Program	3.94	3.88	+0.06	Performance exceeds importance; good, but not a primary driver

For these attributes, performance slightly exceeds importance, as reflected by the negative gaps. While current packaging meets basic functional expectations, protecting product quality, preventing physical damage, and ensuring safe transport, it does not serve as a significant driver of purchase decisions or competitive advantage. The below-average importance scores confirm that packaging is not a primary decision factor for broiler farmers in the Jabodetabek region.

This finding is supported by recent research. A study from China highlights that in B2B agricultural contexts, packaging serves a primarily functional role, with feed buyers prioritizing core product attributes such as nutritional content and feed quality over packaging aesthetics or branding (Chang, 2025). Similarly, research on feed and seed packaging emphasizes that protection, strength, and cost-effectiveness, rather than visual appeal, are the dominant considerations for agricultural buyers (Hobbs et al, 2024). The World Bank's agribusiness guidelines further confirm that packaging functions as a hygiene factor: it preserves product quality and facilitates transport, but once basic standards are met, additional investment yields diminishing returns in customer satisfaction (World Bank Group, 2005). This aligns with Herzberg's Two-Factor Theory, where packaging operates as a basic factor; its absence causes dissatisfaction, but its presence does not create satisfaction. Bruyere et al. (2023) found that packaging improvements to agricultural inputs yielded less than a 5% increase in satisfaction, compared with 25–35% for core product attributes, confirming packaging's low-priority status in B2B agricultural markets. Interpreted through the Kano Model (Kano et al., 1984). Quadrant C attributes (packaging, composition information, distribution reach, delivery timeliness) function as basic ("must-be") factors. Their presence does not satisfy, but their absence dissatisfies. Current performance levels appear sufficient to prevent active dissatisfaction, so further investment would yield diminishing returns.

Quadrant D (Possible Overkill). Quadrant D contains attributes with below-average importance but above-average performance, signaling potential over-investment in areas customers do not consider very important. Based on the research findings, four attributes fall into this quadrant: Payment System Flexibility with MI of 3.88, MP of 3.84, and gap of +0.04; Ease of Purchase Access with MI of 3.90, MP of 3.84, and gap of +0.06; Feed Condition Upon Receipt with MI of 3.97, MP of 3.99, and gap of -0.02; and Beneficial Partnership Program with MI of 3.94, MP of 3.88, and gap of +0.06. For these attributes, performance meets or slightly exceeds customer expectations, as indicated by MP greater than or equal to MI or minimal positive gaps. While this reflects adequate service delivery, the below-average importance scores suggest that additional investment in these areas will yield diminishing returns in terms of customer satisfaction improvement. The four attributes in Quadrant D indicate that PT NH is performing well on attributes that customers do not consider highly important. From a resource-based view (Barney, 1991), this represents an opportunity cost. Resources allocated to maintaining or improving these attributes could be redeployed to address critical gaps in Quadrant A, where importance is high but performance is low.

Table 10. Quantitative competitor SWOT analysis

Competitor	Market share	Price positioning	Distribution coverage	Key strengths	Weaknesses
A	25%	Premium (+15%)	85% jabodetabek	Strong brand, brand equity	Limited rural access
B	22%	Competitive (+5%)	78% jabodetabek	Extensive distribution	Inconsistent quality
C	20%	Economy (-5%)	72% jabodetabek	Cost leadership	Limited product variety
PT NH	18%	Mid-market	65% jabodetabek	Quality consistency	Distribution gaps

Table 11. Market volume and growth projection

Year	Projected market volume (million tons)	Annual growth	5-year cagr	Market size (IDR: trillion)*
2024	3.0	+7.0%	7.5%	27.0
2025	3.2	+6.7%	7.5%	28.8
2026	3.5	+7.8%	7.5%	31.1
2027	3.7	+7.2%	7.5%	33.3
2028	4.0	+8.1%	7.5%	36.0

*Average price assumption IDR 9,000/kg

This finding is consistent with Kotler and Keller (2023), who noted that exceeding customer expectations on low-importance attributes yields diminishing returns in B2B agricultural markets. From a resource-based view (Barney, 1991), PT NH is allocating scarce resources to attributes that neither reduce dissatisfaction nor create satisfaction. An opportunity cost, since these resources could be redeployed to the critical Quadrant A gaps. The additional investment would directly reduce dissatisfaction. This is consistent with Kotler and Keller (2023), who noted that excessive promotion in B2B agricultural markets often yields limited returns.

Competitor Analysis and Market Positioning

The competitor analysis shows that PT NH faces intense competition with a narrower distribution coverage (65%) than its key competitors. The quantitative SWOT (Table 10) reveals opportunities for market-share growth through targeted distribution expansion and strategic pricing adjustments.

Based on GPMT 2024 quarterly reports and growth assumptions tied to Indonesia's projected GDP growth of 5.2–5.8% per year, the market volume and growth projection are presented in Table 11. The Jabodetabek broiler feed market shows robust annual growth ranging from 6.7% to 8.1%, with a projected compound annual growth rate (CAGR) of 7.5% over the five years from 2024 to 2028. This growth trajectory justifies strategic investment in distribution infrastructure and product development to capture rising demand.

Strategies to Increase Sales Turnover

To enhance sales turnover in the Jabodetabek region, four strategies are recommended: (1) price optimization—aligning pricing with competitor offerings while maintaining value; (2) distribution efficiency—reducing delivery times and improving availability through logistical enhancements; (3) product diversification—introducing new feed variants tailored to specific farmer needs; and (4) service excellence—strengthening after-sales support to build long-term loyalty

Conclusions

This study set out to map the profile of broiler farmers in the Jabodetabek region, to analyze the factors determining their feed purchase decisions, to measure their satisfaction across product and service attributes while identifying the gaps between importance and performance, and ultimately to formulate a market-share enhancement strategy for PT NH. The findings

show that the region's customer base is dominated by medium-scale farmers concentrated in Bekasi and Bogor, whose purchasing decisions are driven primarily by nutritional content, after-sales service, and competitive pricing. The Importance-Performance Analysis revealed that competitive pricing, distribution availability (stock availability), and after-sales service are the priority attributes requiring immediate improvement (Quadrant A), whereas nutritional content, feed quality, and feed variety represent existing strengths that should be maintained (Quadrant B). Accordingly, the recommended strategy centers on price restructuring, distribution-network strengthening, and after-sales service enhancement, supported by reallocating resources away from over-served, low-importance attributes (Quadrant D) such as promotional programs toward these priority areas.

Theoretically, the study extends Expectation-Disconfirmation Theory to business-to-business agricultural markets by demonstrating that the observed satisfaction gaps reflect negative disconfirmation. It further draws on Transaction Cost Economics to explain why distribution reliability and price predictability (rather than price level alone) shape supplier choice in a high-uncertainty urban market, and integrates the Kano Model and the Resource-Based View with IPA to interpret attribute priorities and to frame over-investment in low-importance attributes as a resource-reallocation opportunity. These contributions carry both academic and practical significance: they confirm the value of IPA for diagnosing satisfaction gaps in industrial agricultural contexts, show that feed-market satisfaction is multi-dimensional rather than price-driven alone, and add urban Southeast Asian evidence to a still-limited body of literature.

At the same time, these conclusions should be read in light of the study's limitations. A relatively small, purposively selected sample drawn from the customers of a single feed company, a single-region focus, and a cross-sectional design that captures satisfaction at only one point in time. Future research could therefore broaden the sample and geographic scope across multiple regions and companies, adopt longitudinal designs to track how satisfaction gaps evolve in response to external shocks, compare independent and plasma farmers to reveal segment-specific priorities, and combine IPA with qualitative methods to uncover the underlying reasons behind the gaps. Overall, the study concludes that pricing, distribution availability, and feed variety are the principal areas requiring improvement, while service quality and product attributes stand as competitive strengths to be sustained, offering PT NH an evidence-based foundation for strengthening its competitive position in Indonesia's most challenging broiler feed market.

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