



Omnichannel marketing communication strategy for urea fertilizer products: Indonesian case study

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ABSTRACT

This study was conducted to determine the omnichannel marketing communication strategy for urea fertilizer products implemented by PT Pupuk Indonesia and to analyze the alternative omnichannel marketing communication strategies implemented by PT Pupuk Indonesia based on Porter's Five Forces analysis in Indonesia. This research is qualitative research with a case study research method with data collection techniques in the form of interviews and documentation. The level of competition within the urea industry in the Indonesian market is relatively low in contrast with the global market. The substantial capital required for establishing a new urea plant serves as a deterrent to potential new entrants. Additionally, alternative products capable of replacing the function of urea contribute to this deterrent. The bargaining power of buyers is not particularly significant, given the limited number of competitors in the market. Conversely, the bargaining power of suppliers is considered substantial, attributed to government-regulated regulations concerning raw materials, specifically gas. PT Pupuk Indonesia employs both online and offline media for communication, with a strategic emphasis on online media to enhance data accessibility for stakeholders. The implementation of an omnichannel approach in marketing channels has resulted in an overall increase in fertilizer sales in 2022. Survey findings on customer satisfaction reveal a high level of contentment among customers with the products and services provided.



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1. INTRODUCTION

In today's highly competitive business world, companies need to adopt innovative marketing strategies to be able to compete competitively with other companies. The strategy in question includes offline and online strategies, in this case, online marketing considerations are increasingly needed by the industry considering that the number of internet users in Indonesia continues to increase significantly every year. According to a survey by the Indonesian Internet Service Providers Association (APJII, 2023), Indonesian internet users will reach at least 215.63 million people in the 2022-2023 period, or around 78.18% of Indonesia's total population (Pidada, 2023).

This strategy applies to various industrial sectors, including companies engaged in agricultural manufacturing. Considering that Indonesia is an agricultural country, the agricultural sector occupies a crucial position. There will be at least 10.45 million ha of harvested area and more than 1,500,000 people work in the agricultural sector. To support the needs of the agricultural sector, it is necessary to increase agricultural supporting products, one of which is fertilizer and seed products (BPS, 2023)

Indonesia is an agricultural country that in practice requires fertilizer for agricultural development, this can be seen from the increase in the fulfillment of Indonesia's fertilizer needs every year (Shaffiyah, 2023; Winoto & Siregar, 2008). The distribution of fertilizer subsidies in Indonesia is supported by a state-owned company called PT Pupuk Indonesia (Busthanul et al., 2023)

PT Pupuk Indonesia has an important role in the agricultural sector, as one of Indonesia's economic pillars. Based on Kompas data in 2023, PT Pupuk Indonesia is the state-owned company that contributes dividends the third largest in Indonesia with a nominal value of 5 trillion Rupiah and state tax payments of 8.2 trillion Rupiah and become one of the main sectors supporting the agricultural industry. PT Pupuk Indonesia is a State-Owned Enterprise company that operates in the agrochemical sector in producing urea fertilizer in Indonesia. Indonesia is also one of the largest producers of urea fertilizer products with a production capacity of 8.8 million tons.

The continued growth of the agricultural industry has made competition in national and international commodity markets increasingly high. One approach to improving the marketing strategy of the fertilizer industry in Indonesia and involving customers is implementing an omnichannel marketing communication strategy, which involves utilizing various marketing channels, both online and offline, to create a good customer experience (Bahri & Istiharini, 2020). This research is focused on omnichannel marketing communication strategies for fertilizer products, especially urea products in Indonesia, a rapidly growing market for agricultural products. Omnichannel is the main object of interest, especially for describing offline and online channels (Hidayat et al., 2022). Omnichannel reflects the multidimensional nature of the customer journey and provides interesting insights into the use of digital channels and technologies (Mali et al., 2022). In addition, it is important to consider differences in influence between channels, as well as ensure that customers' omnichannel experiences meet their expectations to create customer satisfaction and increase purchasing behavior (Shankar & Kushwaha, 2021).

The unique features of an omnichannel strategy are also drivers of differentiated market positioning, and can also be obstacles to the structural implementation of an omnichannel strategy. All customers anticipate retail stores to be sufficiently integrated with each retailer's digital capabilities, potential, and competencies to be successful. Customers feel that, no matter what, retailers must serve all customer needs, whenever and wherever they shop, without limiting considerations in the foundations and research of omnichannel retailing (Hole et al., 2019). Research by Mishra et al., (2020) on Consumer Decision-Making in Omnichannel Retailing: Literature Review and Future Research Agenda prove the existence of a relationship between omnichannel retail and consumer decision-making, with special attention to consumer motivation, attitudes, and behavior toward omnichannel retail. Providing information in company decision-making about the best way to develop an omnichannel experience has also been proven to increase consumer behavioral responses such as personal participation, satisfaction, and engagement with the company (Lorenzo-Romero et al., 2020).

According to Payne et al., (2017) in helping to operationalize the construct, brand-consumer involvement is included in its antecedents and consequences. Additionally building an understanding of offline and online consumer brand touchpoints and how companies can increase engagement and profitability is how omnichannel IMC best monetizes buyer-seller relationships and omnichannel IMC in the context of other consumer decisions. The existence of OCR-related fields, such as societal context and

omnichannel consumption, makes internal omnichannel resources a driver of sustainable competitive advantage (Rusanen, 2019).

2. RESEARCH METHOD

This research is qualitative research with a descriptive analysis approach using a constructivist paradigm (Tomaszewskih et al., 2020). The research method used is a case study with the object of this research focused on the omnichannel marketing strategy carried out by PT Pupuk Indonesia to achieve competitive advantage and its alternative strategies, while the subject used as an informant in this research is the Marketing Division of PT Pupuk Indonesia. The selection of subjects in this research used a purposive sampling technique, selecting research subjects based on the specific characteristics possessed by the research subjects. Data collection techniques in this research used interview and documentation methods. Data analysis techniques in qualitative research consist of data reduction, data presentation, and conclusion (Miles et al., 2018).

3. RESULTS AND DISCUSSIONS

3.1 Porter Five Forces Competitor Analysis

There are 5 factors of competitive advantage which are called Porter's Five Forces. Each aspect of Porter's Five Forces is explained as follows (Porter, 2008).

3.1.1 Competition Between Competitors

The level of competition in the urea fertilizer industry in the petrochemical market is not too high because in the Indonesian market itself, the urea fertilizer factory is only produced by PT Pupuk Indonesia. Meanwhile, if you look at the world market, PT Pupuk Indonesia has several competitors, including Sinofert, a Petrochemical company in China with a capacity of 6 million tons of urea per year, there is Qafco from Qatar which has a production capacity of 6.5 million tons of urea per year, then followed by Fertiglobe, a Petrochemical company located in Abu Dhabi, with a production capacity of 5 million tons of urea per year.

The competitive advantages of Indonesian fertilizer include the availability of products that have great potential to meet the Southeast Asian market, and due to Indonesia's strategic position, it has lower transportation costs to target the ASEAN and Australian markets. The next advantage is that Indonesian fertilizer has more competitive gas raw material prices compared to competitors so production costs are more efficient (Ilinova et al., 2021). The way fertilizer factories can increase their competitiveness is by carrying out efficiency so they can maintain margins, improving service to excellent service, and carrying out massive branding improvements which can be in the form of promotions or other branding activities.

Urea fertilizer is only produced in the Indonesian market by PT Pupuk Indonesian which has 5 subsidiaries. They are PT Pupuk Iskandar Muda, PT Pupuk Sriwijaya, PT Pupuk Kujang Cikampek, PT Pupuk Petrokimia Gresik and PT Pupuk Kalimantan Timur (Destiartona & Purwantib, 2021). Seen from the level of development of Indonesian fertilizer is divided into 2-4% within 5 years in foreign markets, while for domestic markets it is only 2%. The latest trend for urea fertilizer products is the addition of supporting chemicals to improve the function of urea. As well as expanding into a more sustainable type of urea product (green urea)(Milani et al., 2022;Seleiman et al., 2020).

3.1.2 Threat of New Entrants

Several obstacles to entering the urea fertilizer industry including the large amount of capital required due to the high technological requirements. The cost required to build a fertilizer factory with a capacity of 1 million tons of urea per year is 1 million USD. It takes 36 months to build a fertilizer factory with a capacity of 1 million tons of urea per year

(Trenkel, 2010) The large amount of capital needed to build a new urea fertilizer factory causes little threat to new entrants, especially in urea fertilizer factories. Ways that urea fertilizer factories can protect themselves from the threat of new entrants are to run factories efficiently so that product production prices can be competitive and carry out more massive promotions.

Several regulations governing the urea fertilizer industry include the use and price of certain natural gas in the industrial sector with the Decree number of the Minister of Energy and Mineral Resources of the Republic of Indonesia Number: 134.K/HK.02/MEM.M/2021, Regulation of the Minister of Agriculture No. 10 of 2022 concerning Procedures for Determining Allocations and Highest Retail Prices for Subsidized Fertilizers in the Agricultural Sector and Regulation of the Minister of Trade of the Republic of Indonesia Number 19 of 2021 concerning Export Policies and Regulations.

3.1.3 Threat of Substitute Products

Several products can replace the function of urea fertilizer, including NPK compound fertilizer and organic fertilizer. One of the biggest threats to substitute products is NPK fertilizer, which is a compound fertilizer that has a complete functional content that can replace the function of a single urea fertilizer product (Sasiwou, 2022) On the other hand, NPK fertilizer products are more expensive and not competitive. Meanwhile, organic fertilizer is not a big threat to urea fertilizer products because this product is produced only for household consumption. It does not require large costs to switch from urea fertilizer to a replacement product because the substitute product is usually easy to do because use simpler technology. The environmental impact of substitute products is better because the carbon release produced by organic products is smaller than urea products. One way that urea fertilizer factories can reduce the threat of substitute products is by meeting market demand and selling urea fertilizer products at affordable prices (Adegoke et al., 2016).

3.1.4 Bargaining Power of Buyers

Buyers of urea fertilizer are customers from the plantation and large industrial sectors. In this case, Pupuk Indonesia also must fulfill subsidies to Indonesia. Indonesia only has 5 fertilizer factories producing urea fertilizer. This causes the bargaining power of buyers to be small because Indonesian fertilizer has no competitors in the domestic market and few big competitors in foreign markets and is supported by regulations in Indonesia. In 2022, the number of buyers of PT Pupuk Indonesia is 785 companies. Based on several buying and selling activities in 2022, several buyers have great bargaining power, including PT A, PT B, and PT C which have total sales transactions above 1 million tons of urea.

3.1.5 Bargaining Power of Suppliers

The main raw material for urea fertilizer products is ammonia which can be produced through the natural gas process. The main supplier of natural gas for PT Pupuk Indonesia's subsidiary is found in several sources of natural gas supply, and the bargaining power of suppliers can be said to be very large because it is also assisted by regulations on gas raw materials by the government. The following are PT Pupuk Indonesia's main gas sources:

Table 1. PT Pupuk Indonesia Subsidiary

Subsidiary Company	Sources of Natural Gas Supply
PT Pupuk Sriwidjaja Palembang	WK Pertamina EP (Asset II) WK Corridor WK Pandan
PT Pupuk Kujang Cikampek	WK Pertamina EP (Asset III) WK Offshore North West Java WK PEP (Asset II)
PT Pupuk Kalimantan Timur	WK Area Bontang Kaltim
PT Petrokimia Gresik	WK West Madura Offshore

PT Pupuk Iskandar Muda	WK Madura Strait (Lapangan MAC) WK Madura Strait (Lapangan MDA-MBH) PT AMedco E&P Malaka WK A BP Berau Ltd
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3.2 Omnichannel Marketing Analysis

PT Pupuk Indonesia has identified audiences in communication activities in the company which include internal and external stakeholders. These communication activities are carried out through official communication media owned by the company to communicate with internal and external parties. Communication channels used according to planning in PT Pupuk Indonesia's communication strategy include paid media through advertising, sponsorship, blocking time, media/institution collaboration, earned media (press release/tour/conference, media briefing/visit/gathering), shared media (social media, joint activities), and owned media (websites, e-mail, internal magazines, internal digital communication media, exhibitions, posters, outdoor media). Pupuk Indonesia also provides interactive customer services containing product information and customer complaints (toll-free) via the media: call center, telephone, WhatsApp, and e-mail, also not forget to conduct Customer Satisfaction Surveys which are implemented in collaboration with consultants.

Several offline marketing activities were carried out, including educational promotional activities, customer gatherings, and exhibitions. These activities aim to increase awareness of Pupuk Indonesia Group products in 2022. The number of activities carried out are 1,020 demonstration plots, 3,694 socializations to customers, 40 sponsorships, 37 exhibition activities, 113 publication activities, 20 customer meetings, and 42 billboard installations, then monitoring customer voice, level of customer satisfaction, and loyalty to the Company's products.

PT Pupuk Indonesia always provides easy access to company information and data. Spread of information to all stakeholders is an important part of implementing the principle of information transparency. This policy refers to Law No. 14 of 2008 concerning Openness of Public Information which states, "that Openness of Public Information is a means of optimizing public supervision of the administration of the Country and other Public Institutions and everything that has an impact on the public interest", and as an implementation of GCG principles.

The Company always provides complete, useful, and up-to-date information regarding providing information to Shareholders and Stakeholders. Disclosure of this information is carried out by officials or work units as their duties, authority, and responsibilities, which in this case is the Corporate Secretary. Relevant information related to the company has been submitted through Quarterly and Annual Management Reports to the Board of Commissioners before being submitted to Shareholders. Submission of Annual Management Reports to Shareholders and the Board of Commissioners is always on time according to established provisions.

Implementing information disclosure for internal purposes related to company planning which can have a significant impact on employees in the form of Annual Reports, RKAP, RJPP, Company policies and procedures as well as other latest information about the Company through various communication media such as Websites, Press Releases, Portals, Print Media, Electronic Media, and Circular Letter. Based on the media used, information and data regarding the Company can be obtained through several communication channels. Utilizing omnichannel in marketing channels can be measured by the realization of sales achievements in 2022 and PT Pupuk Indonesia's customer satisfaction in 2022.

3.2.1 Sales Realization

The company divides fertilizer sales into 2 categories, sales of subsidized fertilizer or Public Service Obligation (PSO) fertilizer whose trading system is regulated by government regulations and sales of commercial fertilizer or non-subsidized/non-PSO. Distribution of subsidized fertilizer must fulfill the 6 main principles that have been proclaimed or called 6T: Right Type, Right Quantity, Right Price, Right Place, Right Time, and Right Quality. Meanwhile, commercial fertilizers and non-fertilizers are marketed to domestic distribution networks, industrial sales and exports (Rafani, 2023)

Subsidized Fertilizer/PSO Fertilizer is fertilizer distributed by the PI Group including urea, ZA, SP-36, NPK, and organic. Throughout 2022, the company has distributed 3.89 million tons of PSO urea fertilizer, higher than in 2021 at 3.62 million tons. This decrease was caused by a change in policy from the government in July 2022 through Minister of Agriculture Regulation No. 10 of 2022, several changes include: (1) changing the type of fertilizer subsidized to 2 types of fertilizer, urea and NPK, and (2) reducing the number of subsidized commodities to only rice, corn, soybeans, onions, red, garlic, chili, local coffee, sugar cane and cocoa. In terms of value, total sales of PSO fertilizer in 2022 reached IDR 13.24 trillion, a decrease of 3.35% compared to 2021 which amounted to IDR 13.70 trillion. Reimbursement of subsidy costs from the government in 2022 reached IDR 36.11 trillion or an increase of 42.96% compared to 2021 which was IDR 25.26 trillion.

In the Non-Subsidized/Non-PSO Fertilizer sector, fertilizer sales tonnage decreased in 2022 by 15.7% compared to fertilizer sales tonnage in 2021, from 4.16 million tons to 4.94 million tons. This decrease was mainly due to a reduction in domestic sales of commercial urea and NPK fertilizers compared to the previous year. Urea fertilizer sales tonnage in 2022 was 3.38 million tons, a decrease of 20.6% compared to 2021 of 4.26 million tons. Meanwhile, the sales tonnage of NPK fertilizer decreased by 37%, from 577 thousand tons in 2021 to 363 thousand tons in 2022. However, the sales tonnage of other fertilizers increased 165%, from 157 thousand tons in 2021 to 416 thousand tons in 2022 mainly due to the increase in distribution of ZA and SP-36 fertilizers compared to 2021. The increase in sales tonnage has an impact on increasing the overall sales value of non-PSO fertilizers which has increased by 32.92%, from IDR 25.54 trillion in 2021 to IDR 33.95 trillion in 2022. The increase in the sales of non-PSO fertilizer was mainly due to the high selling price which was utilized by optimal sales of non-PSO fertilizer.

3.2.2 Customer Satisfaction

Regarding customer satisfaction scores, every year PT Pupuk Indonesia carries out satisfaction measurements assisted by consultants. PT Pupuk Indonesia conducts regular customer satisfaction surveys to ensure customer satisfaction with the products and services provided by the Company. Responses collected from customer satisfaction surveys are considered as advice for the company's continuous improvement. In 2022 the measuring of customer satisfaction was done in the subsidized and non-subsidized sectors with the following results:

Table 2. Satisfaction Index Value 2022

Customers Group	Satisfaction Index Value 2022 Likert Scale	Description
Subsidy	4,97	Very Satisfied
Non-Subsidy	4,70	Very Satisfied
Grand Total	4,81	Very Satisfied

PT Pupuk Indonesia continues striving to maintain customer satisfaction by providing the best products and services accompanied by continuous improvement efforts. Until 2022, the total satisfaction index value of PT Pupuk Indonesia is 4.81 or with the title Very Satisfied, the survey results show that customers are very satisfied with the products and

services. This means that PT Pupuk Indonesia will continue striving to maintain quality and performance in the future to maintain customer satisfaction.

4. CONCLUSION

The omnichannel marketing used by PT Pupuk Indonesia employs both online and offline media for communication. PT Pupuk Indonesia provides Company information and data through various communication media such as Websites, Press Releases, Portals, Print Media, Electronic Media, and Circular Letters. The implementation of an omnichannel approach in marketing channels has resulted in an overall increase in fertilizer sales in 2022. The increase in sales tonnage has an impact on increasing the overall sales value of non-PSO fertilizers which has increased by 32.92% from IDR 25.54 trillion in 2021 to IDR 33.95 trillion in 2022. Survey findings on customer satisfaction reveal a high level of contentment among customers. The total satisfaction index value of PT Pupuk Indonesia is 4.81 or with the title Very Satisfied. The survey results state that Customers are very satisfied with the products and services provided. Several things that Pupuk Indonesia can do in carrying out an omnichannel marketing strategy include (1) Using customer data to target relevant messages in the right channels, (2) Optimizing the use of the company's website and social media to provide information and services to customers, and (3) offer an integrated loyalty program across multiple channels. For future research, it is recommended to research omnichannel marketing with other industries as an object of research, such as the food, retail, and fashion industries which have more competitors.

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