

SUPPLY CHAIN MANAGEMENT OF CIGARETTE INDUSTRY IN PT DJARUM AND GUDANG GARAM INDONESIA

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Abstract

PT Djarum and PT Gudang Garam are two of the major companies that dominate the industry. Both companies are known for their highly recognized cigarette brands both nationally and internationally. This research aims to find out the supply chain management of PT Djarum and Gudang Garam and find out the solutions to the challenges of the differences between the two companies. The results of this study indicate that: PT Djarum's supply chain management begins with a careful selection of raw materials combined between art and science. There is a secret ingredient in every production where Djarum continues to produce classic cigarette products manually. Djarum is supported by advanced laboratory technology. new. In addition to developing kretek aroma, R&D insights are also applied to the manufacturing and production side. In contrast to Djarum, Gudang Garam's supply chain management is based on the company's founding philosophy, providing a solid foundation for best practices in good corporate governance. Supply chain challenge solutions, have differences, the comparison is seen from: 1) Size and Production Capacity, Gudang Garam has a larger production capacity than Djarum with a market capitalization value of US\$3.12 billion or around 47.72 trillion; 2) Brand Portfolio, both brands have high popularity in Indonesia and have different market segments; 3) Distribution, both companies have warehouses, distribution centers, and cooperation with transportation providers to ensure efficient and timely products; 4) CSR and Environment, both have a commitment to social responsibility. CSR and Environment, both have a commitment to sustainable social and environmental responsibility. Both have community development programs, education, and health initiatives.

Keywords: *Supply Chain Management, Cigarette Industry*

Introduction

The cigarette manufacturing industry is one of the most established and growing industries in Indonesia (Saraswati, 2015). The two major players in the industry, Djarum and Gudang Garam, have become icons in the tobacco business and have a long history in the country. However, like all industries, the tobacco industry also faces a number of significant challenges, mainly related to the complex supply chain (Huang et al., 2022). The importance of supply chain resilience in the tobacco industry cannot be overlooked. Cigarettes are a highly regulated product, and companies in this industry must undergo very strict production processes in accordance with regulations and standards set by government bodies (Fachriza &

Moeliono, 2017). In addition, consumer demand for different brands and types of cigarettes remains strong, which places extra pressure on companies to maintain supply continuity.

However, the cigarette manufacturing sector also has some unique challenges. One of them is the intense competition among big brands such as Djarum and Gudang Garam as well as various smaller players trying to grab market share (Ermawati & Suharti, 2017). In addition, changing consumer trends towards healthier lifestyles and declining cigarette consumption in some countries are factors to consider. All of these have an impact on the strategic planning and supply chain resilience of companies in this industry. Supply chain resilience is the ability of companies to respond and survive in the face of various disruptions and changes that occur in their supply chain (Affini et al., 2022). In the context of the cigarette manufacturing industry, this includes various challenges such as sudden regulatory changes, raw material scarcity, interruptions in production, and many other factors that can disrupt operational continuity (Ismawati dan Kadarsih, 2023).

Indonesia is one of the largest cigarette markets in the world and the country's tobacco industry has a significant impact on the national economy (Irawan, 2015). The two leading companies in Indonesia's tobacco industry are PT Djarum and PT Gudang Garam, which have long been major players in the national and international cigarette markets. Both companies have complex supply chains that cover various stages, from the procurement of tobacco raw materials to the distribution of final products to consumers. In recent years, supply chain management has become one of the key factors in maintaining the competitiveness and sustainability of the tobacco industry (Utami, 2014).

Cigarette sales in 2021 increased by 7.2% from 2020, from 276.2 billion sticks to 296.2 billion sticks (Yosef et.al, 2023). Meanwhile, according to data from the Directorate General of Customs and Excise, the amount of cigarette consumption in Indonesia reached 322 billion cigarettes in 2020 (Barus et.al, 2023). Indonesia is among the 10 countries with the highest number of smokers in the world. Citing data from the Tobacco Atlas in 2020, Indonesia ranks third after China and India (Mayah et.al, 2021).

The tobacco industry in Indonesia plays an important role in the country's economy. According to data from the Indonesian Ministry of Industry, the tobacco industry contributes significantly to national income, job creation, and tax revenue (Pratiwi et.al, 2017). In addition, the industry is also one of the main drivers of economic growth in various regions in Indonesia, especially in areas where tobacco is produced. PT Djarum and PT Gudang Garam are two of the major companies that dominate the industry. Both companies are known for their highly recognizable cigarette brands both nationally and internationally. Their presence in the industry has contributed significantly to the Indonesian economy, including state revenues and efforts to improve community welfare through job creation (Probosiwi, 2016).

In the tobacco industry, supply chain management plays a very important role. The tobacco supply chain includes a series of activities ranging from procurement of tobacco raw materials, cigarette production, to product distribution to various markets. Efficiency, speed, resilience and security in this supply chain are key factors that can affect the competitiveness of companies in this highly competitive industry (Sherlywati, 2015). In particular, effective supply chain management can result in various benefits, such as increased operational efficiency, reduced costs, risk control, and the ability to respond quickly to market changes. Tobacco companies such as PT Djarum and PT Gudang Garam need to understand well how to manage their supply chains in order to maximize profits and continue to thrive in a rapidly changing business environment (Puspitasari, 2023).

Supply chain management in the tobacco industry in Indonesia is faced with a number of challenges and opportunities. One of the main challenges is the strict government regulations related to cigarette advertising and high taxation on tobacco products (Rajasa, 2021). In addition, tobacco companies also have to deal with the changing behavior of consumers who are increasingly aware of the health impacts of smoking, which may affect the demand for tobacco products (Ulfa dan Nilfatri 2023). On the other hand, there are great opportunities to improve supply chain efficiency and sustainability through technological innovation, collaboration with business partners, and improvements in risk management. Tobacco companies that can overcome these challenges and capitalize on these opportunities will have a greater competitive advantage in the industry (Sunarti dan Kurniawan, 2023).

Therefore, research on supply chain management at PT Djarum and PT Gudang Garam is essential. This research can provide valuable insights into best practices in supply chain management in the tobacco industry, as well as help these companies to improve their efficiency, sustainability and competitiveness in a dynamic market. In addition, this research can also make a valuable contribution to the understanding of the tobacco industry in Indonesia more broadly.

Research Methods

This research includes qualitative research with library research methods. Researchers use incidental means as the main instrument and analyze scientific literature in the form of journal articles, books, scientific magazines and other scientific publications related to the discussion on the theme. Library research is the collection of theory and information from library data with research as a topic foundation in solving research problems. proposed (Suharsimi Arikunto: 129). In this study, researchers used data collection techniques, namely collecting data sources that are in accordance with the research variables. second, researchers selected data that had some relevance and relation to the Cigarette Industry Supply Chain Management at Pt Djarum and Gudang Garam Indonesia. The next procedure in this study after the data is collected then researchers carry out data analysis. The data analysis technique used by the author is carried out with various stages including through data collection, data

display, data condensation, and carrying out conclusion drawing and verification (Sugiyono, 2018).

Research Results and Discussion

PT Djarum Indonesia Supply Chain Management

Djarum has come a long way since its inception in the 1950s. Growing over time, it is now a high-tech mass production line, producing cigarettes for both domestic and international markets. Djarum's first kretek factory was established on April 21, 1951 by the company's founder, Oei Wie Gwan, in Kudus, Central Java (Badli, 2011). Just nine months earlier, Oei Wie Gwan had purchased the brand and license to the name. Kudus is the birthplace of kretek, which later became the base of one of Indonesia's leading industries (Ihsan, 2017). Over the years, the small home industry of Djarum developed into an internationally recognized brand.

Djarum started as a small business with 10 workers on Jalan Bitingan Baru No. 28 (now Jalan A. Yani No. 28), Kudus (Apriliyani, 2022). The mixing of cloves and tobacco was done manually using very simple equipment. Oei himself can be found rolling kretek on the workshop floor when not promoting and selling Djarum kretek on the streets of Kudus (Dani, 2012). Djarum's hand-rolled kretek remains a differentiator with consistent quality and flavor and attracts many fans. Oei Wie Gwan passed away in 1963, but the company he built survived. Under the leadership and vision of Oei's two sons, Michael Bambang Hartono and Robert Budi Hartono, Djarum continues to grow and become one of the largest and most successful kretek companies today (Wahjono, 2011).

The process of making kretek is a blend of art and science (Mulanto, 2014). Djarum continues to support the production of classic hand-rolled kretek cigarettes. Djarum's first kretek cigarettes were handmade using minimal equipment through a simple manufacturing process (Christin, 2015). Over the years, the variety of kretek cigarettes made by Djarum has grown considerably. Simply put, kretek cigarettes are categorized by their method of manufacture into either hand-rolled or machine-made kretek cigarettes. Both are popular and produced in large quantities. Meanwhile, Djarum's innovation in terms of flavorings has resulted in a wide variety of brands (Zuhdi dan Munip, 2023).

The manufacturing process begins with a careful selection of raw materials. The main raw materials for production consist of tobacco and cloves that have been processed through Djarum's signature cutting process into machine-made clove cigarettes (SKM) (Badli, 2011). Cloves and tobacco are mixed together under strict and meticulous supervision, then additional ingredients are added before the mixture is rolled into wrappers and packaged for distribution (Purbosari, 2010).

Hand-rolled Kretek cigarettes (SKT), continue to be made by Djarum using time-honored manual rolling methods by approximately 60,000 skilled workers based at our factories in Kudus (Yuristiadhi, 2014). The packaging process is also done manually to enhance the handmade feel. The entire process is closely monitored using

systematic quality control checkpoints to ensure consistent results. As a time-tested product, hand-rolled clove cigarettes have a loyal following.

Djarum Coklat, Djarum 76, and Djarum Istimewa are some of the most popular hand-rolled clove cigarette brands available in the market today (Widodo, 2010). The rich aroma and long-lasting enjoyment of these brands continue to guarantee their popularity among kretek lovers. Machine-made Kretek Cigarettes (SKM) were introduced in 1970 to meet the growing demand for a more sophisticated kretek experience, competing with Western brands that were using machines at the time (Anggriawan, 2013).

Today, Djarum machine-made kretek cigarettes are produced with a fully automated process using high-tech machinery. Under a total production management approach, an integrated control and computerized monitoring system oversees the process up to the final packaging stage. Favorite machine-made clove cigarette brands include Djarum Super, LA Lights, and Djarum Black, three brands that are widely recognized in the domestic and international clove market (Suparno, 2012)).

Since its initial entry into the international market in the 1970s, Djarum's exports of tobacco products have grown rapidly, helped by a growing awareness and appreciation of the unique taste of kretek. Today, Djarum brands are available on five continents. Not resting on its laurels, Djarum continues to deliver innovative products designed to reach new markets. Kretek is made from natural products. The basic ingredients of tobacco and cloves are supplemented with special ingredients to enhance the aroma. Grown in Indonesia's unique climate and soil. It is these components that give kretek its distinctive flavor, depending on the type, age and proportion of tobacco, cloves and special ingredients used. Tobacco was introduced to the archipelago by European explorers on their expeditions. Today, Indonesia is known as the best tobacco producer in the world. More than 100 varieties thrive in its rich volcanic soil, occupying more than 250,000 farmlands mostly in Sumatra, Java, Bali and Lombok (Irwandi, 2021).

Regional differences in aroma and nicotine content occur due to soil conditions, rainfall, altitude, climate, and local smoking traditions, but the best tobacco is considered to come from the Temanggung region in Central Java (Sidabutar et.al, 2023). The unique climate of this mountainous region is said to produce not only the most aromatic tobacco, but also the highest nicotine tobacco in the world. There is a final secret ingredient in every kretek; a highly guarded flavor that contains herbal extracts, and various natural aromas and compounds. These secret ingredients add to the blend of tobacco and cloves, providing the final components that make up the distinct flavor of each brand (Ratnawati, 2016).

PT Gudang Garam Indonesia Supply Chain Management

PT Gudang Garam Tbk is an Indonesian tobacco company engaged in the supply chain industry. It is one of the leading cigarette manufacturers in the country and is famous for its popular cigarette brand, Gudang Garam. In the supply chain

industry, PT Gudang Garam manages several key activities related to the production and distribution of its products. The company sources tobacco from local and international suppliers and oversees the production process to ensure the production of high-quality cigarettes (Putri, 2023). To support its supply chain operations, PT Gudang Garam has a network of warehouses and distribution centers strategically located throughout Indonesia. The company collaborates with various transportation providers and distributors to ensure efficient delivery and distribution of products to its customers (Clorina et.al, 2022).

As one of the largest cigarette manufacturers in Indonesia, PT Gudang Garam processes tons of cloves to make fragrant kretek cigarettes, called kretek. Founded in 1958 by the Wonowidjojo family, Gudang Garam blends cloves with tobacco to produce more than 70 billion cigarettes annually (Santoso, 2017). The company has a 514-hectare tobacco complex in East Java that includes machine-rolled and hand-rolled cigarette operations. Gudang Garam is affiliated with other companies engaged in banking, investment, and polyester film production (<https://www.gudanggaramtbk.com>).

Starting from a home industry, Gudang Garam cigarette company grows and develops with good corporate governance and is based on the philosophy of Catur Dharma (Four Ways of Life) (Hafiz et.al, 2016). These values guide our behavior and performance, both for employees, shareholders, and the wider community. What Gudang Garam has achieved today cannot be separated from the important role of the founder, Surya Wonowidjojo. He is a true entrepreneur, mature in experience and business sense. In the eyes of the employees, he not only acts as a leader, but also a father, brother, and friend who is very concerned about the welfare of employees (Putri, 2023).

Surya Wonowidjojo passed away on August 28, 1985, leaving a deep impression not only on the employees, but also on the people of Kediri and its surrounding areas (Putri, 2023). He was a role model who instilled noble values for the company, which were crystallized in the Company's Catur Dharma (Hafiz et.al, 2016):

1. A life that is meaningful and beneficial to the general public is true happiness..
2. Hard work, perseverance, honesty, health, and faith are prerequisites for success..
3. Success cannot be separated from the role and cooperation with others.
4. Employees are the main business partners..

Gudang Garam and its subsidiaries provide livelihoods for 31,559 workers by the end of 2022 (<https://www.gudanggaramtbk.com/>). As one "big family", employee welfare is a priority, from good safety practices to the provision of sports and health facilities. Training in leadership, managerial, administrative, and technical skills is conducted from time to time through a mix of internal and external courses.

PT Gudang Garam places great emphasis on responsible sourcing and sustainable supply chain practices (Susanty et.al, 2020). The company is actively involved in programs to support local tobacco farmers, providing them with training, assistance, and access to resources to improve their livelihoods and promote sustainable agricultural practices. The company also adheres to strict quality control measures throughout the supply chain to ensure the safety and integrity of its products (Yanti et.al, 2021).

In addition, PT Gudang Garam is committed to social and environmental responsibility. The company invests in community development programs, education, and healthcare initiatives to positively impact the community (Rimpulaeng & epang, 2014). The company also implements environmentally friendly practices, such as waste management and energy conservation measures, to minimize environmental impacts. Overall, PT Gudang Garam plays an important role in the industrial supply chain, particularly in the tobacco sector, by managing the sourcing, production, and distribution of its products. The company emphasizes responsible sourcing, quality control, and sustainability, and is actively involved in social and environmental initiatives.

PT Djarum and Gudang Garam Supply Chain Difference Solution

Outwardly, today's kretek cigarettes are a far cry from the crude hand-rolled products of the 1800s (El-Syam&Al-Halimi, 2023). However, behind the upgrades of attractive modern packaging and innovative new aromas, the essential pleasure of kretek smoke remains unchanged. This classic experience continues to appeal to a new generation of customers both at home and abroad. Djarum's kretek cigarette industry is currently the largest employer in Indonesia, with more than 500 active kretek factories employing around 180,000 people to produce around 2,000 brands (<https://www.djarum.com/heritageofkretek>). New aromas and flavors continue to emerge in the market as modern research and development methods are used to create new kretek products. Recently, European companies have developed various aromas specifically for the kretek industry.

In research development innovation, Djarum is always at the forefront of finding new products and innovations to bring to the market (Kartajaya, 2013). Research and development plays an important role in driving this progress. Djarum has always realized that Research & Development (R&D) is critical to the development of kretek products. As a pioneer in this field, Djarum's R&D department was established in the 60s, long before the other big kretek players, followed by the construction of an official R&D center in the 70s with the aim to develop new kretek blends (<https://www.djarum.com/>). As reported in the official website of PT Djarum, states that Djarum's contribution in the development of kretek include:

1. Developed the world's first low-tar, low-nicotine kretek.
2. Developed the world's first clove cigarette.
3. Developed kretek with brown paper.

4. Developed black paper kretek.
5. Developing cherry aroma and vanilla aroma kretek.
6. Developed the world's only Superfine kretek blend.

Djarum's R&D team is currently supported by state-of-the-art laboratory technology. The team frequently interacts with the marketing department in its efforts to develop new aromas. In addition to developing kretek aromas, R&D insights are also applied to the manufacturing and production side (Surahman et.al, 2021).

In contrast to Djarum, Gudang Garam's business values, which are based on the company's founding philosophy, provide a solid foundation for best practices in good corporate governance. These values continue to guide management in fulfilling the company's responsibilities towards employees and the surrounding community (Sari et.al, 2021). We are committed to practicing social responsibility and contributing to community development. Gudang Garam participates and collaborates regularly with the surrounding communities and considers the implementation of our social responsibility as an investment for the future, and as an opportunity to ensure that the company and the community can grow together and support each other (<https://www.gudanggaramtbk.com/>).

One of the strategic steps taken by Gudang Garam is to invest in professional human resource development programs in the form of efforts to create innovative human resources, have vision, strategic thinking, and the capacity to lead and develop the organization in a sustainable manner (Agustina, 2023). At Gudang Garam, HR is the main asset that plays an important role in achieving business success and other company goals. Therefore, as part of the company's business strategy, Gudang Garam implements HR development programs to improve the capabilities of all employees (Yulianti et.al, 2021). By growing with employees, Gudang Garam believes it will be able to make achievements as one of the best companies in the country (<https://www.gudanggaramtbk.com/>).

In order to appreciate and provide opportunities for employees to develop professional abilities and achievements in a career, Gudang Garam has a well-structured human resource development program. This HR development program is specifically designed to hone and improve the competencies, technical abilities, and leadership qualities of all employees (Sarina, et.al 2021). This, opportunities to hone skills and career planning will always be wide open for outstanding employees.

Supply chain challenge solutions have differences, the comparison is seen from the following points::

1. Size and Production Capacity

Gudang Garam is one of the leading cigarette manufacturers in Indonesia, while Djarum is one of the largest cigarette manufacturers in Indonesia. As a result, Gudang Garam has a larger production capacity than Djarum with a market capitalization value of US\$3.12 billion or approximately 47.72 trillion (<https://databoks.katadata.co.id/datapublish>).

2. Brand Portofolio

Gudang Garam is famous for its Gudang Garam cigarette brand, while Djarum is famous for its Djarum cigarette brand. Both brands have high popularity in Indonesia and have different market segments..

3. Distribution

Gudang Garam and Djarum have extensive distribution networks throughout Indonesia. Both companies have warehouses, distribution centers, and cooperation with transportation providers to ensure efficient and timely products.

4. CSR and Environment

Gudang Garam and Djarum are both committed to corporate social responsibility and sustainable environmental practices. Both have community development programs, education, and health initiatives. They also implement environmentally friendly practices such as waste management and energy conservation.

While there are some similarities between PT Gudang Garam Tbk and PT Djarum Tbk, there are also differences in the scale of business and strategies of each company. This comparison only covers some key aspects and does not cover all the differences and similarities in every aspect of the companies' operations.

Conclusion

PT Djarum Indonesia's supply chain management in its manufacturing process begins with a careful selection of raw materials that combine art and science. There is a final secret ingredient in each kretek; a highly preserved flavor that contains herbal extracts, and a variety of natural aromas and compounds. Djarum continues to produce classic cigarette products by hand. Djarum is supported by advanced laboratory technology. The team frequently interacts with the marketing department in its efforts to develop new aromas. In addition to developing kretek aromas, R&D insights are also applied to the manufacturing and production side. In contrast to Djarum, Gudang Garam's supply chain management is based on the company's founding philosophy, providing a solid foundation for best practices in good corporate governance.

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