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COMPETITIVENESS ESTIMATION OF FRUIT AND VEGETABLE ENTERPRISE COMPANIES OF THE REPUBLIC OF KAZAKHSTAN

Abstract. The article discusses the activities of enterprises associated with the fruit and vegetable industry. The role of this enterprise is great because it is associated with the production, as well as with the manufacturing industry. An assessment was made of threats to key industry players. The most effective method of dealing with substitutes is to build a strong brand: a clear differentiation and additional benefits from the consumption of company goods, the fight against product standardization, technological improvements, the formation of product loyalty.

Competition among existing competitors is reduced to the desire to improve their position in the market by any means in order to conquer the consumer market. Intense competition leads to price competition, increased costs for the promotion of goods, sometimes to improve product quality, increase investment in new developments. All this reduces the profitability of the industry.

This approach includes five competitive forces: the power of consumers, the power of suppliers, the potential of new participants in the industry, the threat of substitute products, and competition in the industry. A table was created for evaluating assessment results for organizations in the industry. Developed proposals for the strategic development of enterprises in the industry.

Keywords. Industry, production, fruit and vegetable industry, power of consumers, threat of substitute products, strategy, competition.

Introduction. Since fruit and vegetable industry enterprises are production companies on which the food security of the Republic largely depends on, their role is growing constantly. We will analyze the sectoral competition in the industry for the production of fruits and vegetables in Kazakhstan based on the Porter's model. In his model, Porter examines ways of competitiveness of manufacturers in the industry based on certain 5 competitive forces.

Methodology. In the process of research, system analysis, expert assessments, general scientific methods were used: analysis, synthesis, comparison.

Results and discussion. The following forces were offered by him: power of customers; power of suppliers; potential of new entrants into the industry; threat of substitute products; competition in the industry [1].

Schematic representation of these threats:

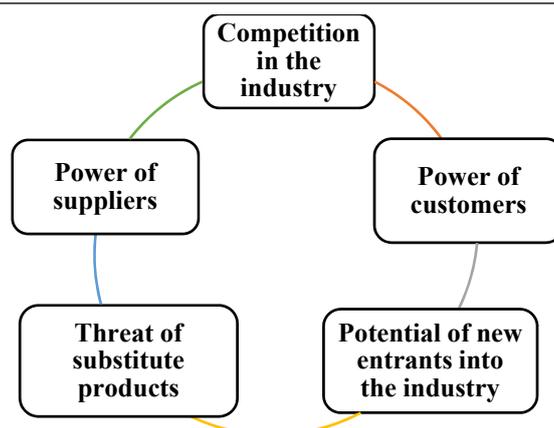


Figure 1 - Competitive forces of the industry

Note - compiled by the author [1]

Competitive analysis of the industry according to Michael Porter helps determine the intensity and degree of competitive forces in the industry, to find a position in which the company will be maximally protected from the influence of competitive forces and will be able to influence them [1].

Michael Porter's golden rule the five competitive forces theory is the following: the weaker the influence of competitive forces is, the more opportunities to obtain high profits in the industry the company has. Conversely, the higher the influence of competitive forces is, the higher the likelihood that no company will be able to provide high profitability from capital investments. And the average profitability of the industry is determined by the most influential competitive forces [2].

Threat of new entrants into the industry. Why new players are considered to be threat? Usually, new players introduce new production facilities, new technologies, new resources to the market, which can be a shock for the industry, change consumer behavior, and set new work standards for existing players [3].

The power of influence of new players depends on the barriers to entry and the speed of influence of existing market players. If the entry barriers to the industry are high and the level of opposition from existing companies in the industry is high, then the impact of new aspirants for profits in the industry will be minimal. Therefore, when working with new players, it is important to properly build output barriers [4].

Porter identifies six main factors affecting the strength of entry barriers in the industry:

Economies of scale. The greater the volume of production is, the lower is the cost of producing 1 unit of production, the more difficult it is for a new player to achieve high profitability when entering the market [5].

Product differentiation and strength of existing brands. The higher the variety of goods and services in the industry is, the more difficult it is for new players to enter the market and occupy a free niche.

Capital requirements. The higher the initial level of investment to enter the industry is, the more difficult it is for new players to enter the industry.

Cost disadvantages independent of size. The higher the level of fixed costs in the industry is, the more difficult it is for new players to profit from sales in the initial period of entry into the industry [6].

Access to distribution channels. The more difficult to reach the target audience in the market is, the lower is the attractiveness of the industry.

Government policy. The higher the restrictions imposed by the state on activities in the industry are, the stricter is the regulated requirements for the product in the industry, the higher is the state participation in the industry, the lower is its attractiveness to new players [7].

Additional threats. There are also additional threats of entry into the industry for new players, these include: the willingness and ability of existing players to lower prices to keep market share; the existing players have additional reserve potential for active counteraction (unactuated sources of funding, additional production capacity, connections to distribution channels, availability of free funds to increase pressure of advertising, etc.), as well as a slowdown in the industry or negative growth rates.

Power of customers. Since buyers are consumers of the finished product and ensure the existence of a market by meeting their needs, they can influence the competitiveness of a company's product on the market. When developing a strategy, a company must select those buyers who are the least influential in the market [8].

Consumers can toughen competition by imposing higher requirements on the quality of the product, on the level of service, and exert pressure on the price level. Higher demands on the finished product force manufacturers to improve the quality of the product by increasing costs (better raw materials, additional service conditions, etc.), and, consequently, reduce their level of profit.

Consumers are concentrated and make purchases on a large scale. In such circumstances, the company will be forced to constantly make concessions to customers to ensure guaranteed income and profits.

Products sold on the market do not possess uniqueness; and the customer can freely switch between them without incurring additional risks.

Customers demonstrate high price sensitivity, and have a high need to lower their costs in the future.

Products purchased in the industry are raw materials for another industry. Therefore, customers will be inclined to reduce purchase costs and look for more favorable offers to reduce the cost of their finished products.

Consumers are not satisfied with the quality of the existing product on the market and have a hidden or explicit need for new conditions and properties [9].

Power of suppliers. Suppliers can influence the competitiveness of a company's product on the market, as they own resources for the production of goods in the industry. The rise in prices for raw materials and the conclusion of transactions on unfavorable conditions for the company leads to an increase in the cost of finished products, an increase in production costs. If it is impossible to increase the retail prices for finished goods at a level comparable to that of raw materials, the industry's profitability from the sale of goods or services decreases.

The appearance of substitute products. Substitute products limit the market potential in terms of price increase. Usually, substitute products have an impact on the establishment of the upper limit of market prices, which in the face of rising costs of production and raw materials reduces the profitability of companies. Until market players can improve product quality and differentiate their goods from substitute goods, the industry will have low profits and limited market growth [10].

The following types of products provide a particular threat to the growth and profit:

- substitute products that can provide the best value for money. such products in the absence of a high level of differentiation will always encourage the consumer to the switch.
- substitutes produced by large players who have high profits in alternative markets that are able to have a less profitable business in the existing market.

The most effective method of dealing with substitutes - building a strong brand: a clear differentiation and additional benefits from the consumption of the company's goods, the fight against product standardization, technological improvements, the formation of product loyalty [11].

The level of intensity of competition is high or increases if the industry has the following conditions:

- a large number of players and their equality in sales.
- low growth (or decline) of the market, which leads to a constant redistribution of the market, seizure market shares from each other.
- low differentiation and standardization of the product in the industry creates for the consumer an infinite number of alternatives, leads to a constant switching of consumers from one player to another, provides a high level of instability of future income and profits.
- products belong to the category of perishable products, which encourages price reductions and does not provide the possibility of freezing commodity balances.
- high barriers to exit from the industry force players with low profitability to exist, create an excess of production capacity in the market. consider these threats to industry leaders [12].

We will consider the thread of substitute products as exemplified by LLP «TsinKaz». (Table 1).

Table 1 - Assessment of substitute products for «TsinKaz» LLP (1.1 Substitute -products)

Evaluation item	Comments	Parameter estimate		
		3	2	1
Substitute –products «quality-price»	able to provide the same quality at lower prices	exist and occupy a high market share	exist, but only entered the market and their share is small	does not exist
				1
TOTAL SCORE		3		
1 points		low threat level from substitute products		
2 points		average threat level from a substitute product		
3 points		high threat level from a substitute product		
Note - compiled by the author on the basis of [2]				

The competition among the existing competitors is reduced to the desire to improve their position in the market by any means, to conquer the market consumers. Intense competition leads to price competition, increased costs for the promotion of goods, sometimes to improve product quality, increased investment in new developments. All this reduces the profitability of the industry [13].

We will analyze the level of competition in the industry.

Table 2 - Assessment of the level of intra-industry competition for «TsinKaz» LLP (Assessment of the level of intra-industry competition)

Evaluation item	Comments	Parameter estimate		
		3	2	1
Number of players	The more players in the market, the higher the level of competition and the risk of losing market share	High level of market saturation	Average level of market saturation (3-10)	A small number of players (1-3)
Market growth rate	The lower the growth rate of the market, the higher the risk of constant market redistribution	Stagnation or decline in the market	Slowing but growing	High
The level of product differentiation on the market	The lower the product differentiation, the higher the standardization of the product - the higher the risk of switching consumers between different market companies	Companies sell standardized goods	The product on the market is standardized by key properties, but differs by additional benefits	Company products are significantly different.
Price increase restriction	The fewer opportunities to raise prices, the higher the risk of losing profits with a constant increase in costs	Fierce price competition in the market, there are no opportunities to raise prices	There is an opportunity to raise prices only in the framework of cost growth	There is always an opportunity to raise prices to cover cost increase and higher profits
TOTAL SCORE		8		
4 points		Low level of intra-industry competition		
5-8 points		Average level of intra-industry competition		
9-12 points		High level of intra-industry competition		
Note - compiled by the author on the basis of [2]				

There are situations in which suppliers get a high level of influence on a company's profit:

- the number of suppliers in the industry is insignificant. extreme case: there is a monopoly or oligopoly on the market;

- the volume of resources, which are produced by suppliers, is limited in volume and in time, does not meet the demand for the market;

- the costs of switching to alternative suppliers are high (which may be due to the uniqueness of the raw materials, or to existing obligations to suppliers);

- the industry is not a priority for suppliers, and the realization of its resources in it does not provide significant profitability and income for the supplier [15].

We will consider the threat of new entrants into the industry (Table 3).

Table 3- Evaluation of the threat of new entrants for «TsinKaz» LLP (Evaluation of the threat of new entrants)

Evaluation item	Comments	Parameter estimate		
		3	2	1
Economies of scale in the production of goods or services	The greater the volume of production is, the lower is the cost of purchasing materials for the production of goods, the less the fixed costs of production affect the unit of production	Not available	only a few market players exist	significant
			2	
Strong brands with a high level of knowledge and loyalty	The stronger existing brands in the industry are, the more difficult it is for new players to join.	No major players	2-3 major players hold about 50% of the market	2-3 major players hold over 80% of the market
		3		
Product differentiation	The higher the variety of goods and services in the industry is, the more difficult it is for new players to enter the market and occupy a free niche.	low level of product diversity	There are microniches	all possible niches are occupied by players
			2	
Capital requirements	The higher the initial level of investment to enter the industry is, the more difficult it is for new players to enter the industry.	low (pays off in 1-3 months of work)	average (pays off in 6-12 months of work)	high (pays off more than 1 year of work)
				1
Access to distribution channels	The more difficult it is to reach the target audience in the market, the lower is the attractiveness of the industry	access to distribution channels is fully open	access to distribution channels requires moderate investments	access to distribution channels is limited
			2	
Government policy	The government can limit and close the possibility of entering the industry through licensing, restricting access to sources of raw materials and other important resources, regulating the price level	There are no restrictive acts by the state	the state intervenes in the industry, but at a low level	the state fully regulates the industry and sets restrictions
			2	
Willingness of existing players to lower prices	If players can lower prices to maintain market share, this is a significant barrier to the entry of new players	players will not lower prices	major players will not lower prices	existing players reduce prices if any attempt to introduce cheaper offer is made

			2	
Industry grow thrate	The higher the growth rate of the industry is, the more willingly new players are to enter the market.	High growing	Slowin gdown	Stagnation or decline
		3		
TOTAL SCORE		17		
8 points		Low level of threat of new entrants		
9-16 points		Average level of threat of new entrants		
17-24 points		High level of threat of new entrants		
Note - compiled by the author on the basis of [2]				

We will assess respectively the threats for the companies of «Gold Product» JSC and «Issyk Fruit Canning Plant» LLP.

Thus, «Gold Product» JSC is a company operating in the Kazakhstan market since 1998 and is familiar to the consumer, first of all, as the largest producer of grape wines known under the «Turgen» brand name, as well as canned fruits and vegetables under the brands «TurgenBrand», «Goldy», and juice products under the brands «Goldy» and «Dobrynya» [16].

We estimate the power of consumers (Table 4).

Table 4 - Evaluation of power of costumers for «TsinKaz» LLP (Power of costumer)

Evaluation item	Comments	Parameter estimate		
		3	2	1
The proportion of customers with a large volume of sales	If costumers are concentrated and make purchases on a large scale, the company will have to constantly make concessions to them.	over 80% of sales accounted for several customers	a minor part of the clients holds about 50% of sales	Sales are equally distributed between all customers.
				1
Propensity to switch to substitute commodity	The lower the uniqueness of the company's product is, the higher is the likelihood that the costumer will be able to find an alternative and not incur additional risks.	company product is not unique, there are complete analogues	company product is partly unique, there are distinctive features that are important to costumers	company product is completely unique, there are no analogues
			2	
Pricesensitivity	The higher the sensitivity to the price is, the higher is the likelihood that the costumer will buy the product at a lower price from competitors	the costumer will always switch to a product with a lower price	the costumer will switch only with a significant difference in price	the costumer is absolutely not sensitive to the price
			2	
Consumers are not satisfied with the quality of the existing commodity in the market	Dissatisfaction with quality generates hidden demand that can be satisfied by a new market player or competitor	dissatisfaction with the key characteristics of the product	dissatisfaction with the secondary characteristics of the product	total satisfaction with quality
				1
TOTAL SCORE		9		
4 points		Low level of cosumer switch threat		
5-8 points		Average level of cosumer switch threat		
9-12 points		High level of cosumer switch threat		
Note - compiled by the author on the basis of [2]				

All companies are characterized by a high risk of new players entering the market. This is due to the relatively high growth rates of the industry, the impossibility of reducing the price of products by the main market players in the event of a decrease in prices, with the peculiarity of the industry producing products for the mass consumer [17].

We will consider power of suppliers (Table 5).

Table 5 - Assessment of power of suppliers for «TsinKaz» LLP

Evaluation item	Comments	Parameter estimate	
		2	1
Number of suppliers	The fewer suppliers there are, the higher is the likelihood of unreasonable price increases.	A small number of suppliers or monopoly	Wide range of suppliers
		2	
Suppliers resources limitations	The higher the suppliers resources limitation, the higher is the likelihood of prices increasing	Limitations in volumes	Unlimited volume
		2	
Switching costs	The higher the switching costs are, the greater is the threat to prices increasing	High costs of switching to other suppliers	Low costs to switch to other suppliers
		2	
Priority of direction for the supplier	The lower the priority of the industry for the supplier is, the less attention and effort he puts into it, the higher is the risk of poor quality work	Low industry priority for the supplier	High priority of the industry for the supplier
		2	
TOTAL SCORE		8	
4 points		Low level of suppliers influence	
5-6 points		Average level of suppliers influence	
7-8 points		High level of suppliers influence	
Note - compiled by the author on the basis of [2]			

The assessment showed a fairly high level of threat from substitute products. This means that the company's products are not unique. There are companies that produce goods substitutes, in accordance with the ratio of "price quality", which occupy a sufficiently large market share [18]. It is necessary to work on the production of a unique product to reduce the negative impact of this factor. The level of industry competition shows the average value. This suggests that the market has an average level of saturation, the market growth rate is growing and the product on the market is standardized on key parameters. At the same time, there is a possibility of a slight increase in prices only to cover their costs. There is a fairly high level of threat of new players entering the market. This conclusion arises from the fact that economies of scale do not work in this case. There are no very large players in the market. The industry is mainly represented by quite small companies, there is a fairly low level of differentiation of goods in the market. Access to distribution channels is quite open. There are no restrictive measures on the part of the government in this direction. The growth rate of the industry is growing. For the company, the threat of losing customers is significant. This is due to the fact that, although the company's products are aimed at the mass consumer, however, the company's product is not unique, there are full analogues of products on the market. In view of this, the buyer can always switch to a product with a lower price. The company's mission is the production of domestic high-quality food at affordable prices, the revival of agriculture in Kazakhstan.

The principles on which the company focuses:

- strict quality control of products - control of production processes at all stages of production.
- orientation of the company to the consumer.
- compliance of product quality with all Kazakhstan and international quality standards.
- highly qualified employees.
- the company's pricing policy is flexible: «high product quality at a reasonable price» [20].

Findings. Therefore, we can recommend the company:

- to adhere to the strategy of leadership in a certain market niche and create a more unique product,
- the company should focus its main efforts on building a high level of product knowledge and on building awareness of the unique features of the product,
- to maintain competitiveness, it is necessary to constantly monitor the proposals of competitors and the emergence of new entrants,
- to reduce the impact of price competition on the company sales,
- activity to concentrate on building long-term relationships with the customer,
- it is recommended to diversify the client portfolio,
- special programs are required for VIP clients and an economy program for price-sensitive consumers.

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ҚАЗАҚСТАН РЕСПУБЛИКАСЫНЫҢ ЖЕМІС-ЖИДЕК ЖӘНЕ КӨКӨНІС КӘСІПОРЫНДАРЫНЫҢ БӘСЕКЕЛЕСТІК ҚАБІЛЕТТІЛІГІН ТАЛДАУ

Аннотация. Мақалада жеміс-көкөніс өнеркәсібімен байланысты кәсіпорындардың қызметі талқыланады. Бұл кәсіпорынның рөлі жақсы, себебі ол өндіріспен, сондай-ақ өңдеу өнеркәсібімен байланысты. Негізгі индустриалды ойыншылардың қатерлеріне баға берілді. Ауыстырғыштармен жұмыс істеудің ең тиімді әдісі - күшті бренд құру: компания өнімдерін тұтынадан нақты айырмашылық және қосымша артықшылықтар, өнім стандарттаумен күрес, технологиялық жетілдірулер, өнімнің адалдықты қалыптастыру.

Қолданыстағы бәсекелестер арасында бәсекелестік тұтыну нарығын жаулап алу үшін кез-келген тәсілмен нарықтағы өз ұстанымын жақсартуға деген ұмтылысқа дейін төмендетілді. Қарқынды бәсекелестік баға бәсекелестігіне әкеледі, тауарларды көтермелеу шығындарын көбейтеді, кейде өнім сапасын жақсартуға, жаңа жетістіктерге инвестицияларды артыруға мүмкіндік береді. Осының барлығы саланың табыстылығын төмендетеді.

Бұл тәсіл бес бәсекелестік күшін қамтиды: тұтынушылардың күші, жеткізушілердің күші, салаға жаңа қатысушылардың әлеуеті, өнімді ауыстыру қаупі және салада бәсекелестік. Саладағы ұйымдар үшін бағалау нәтижелерін бағалау үшін кесте құрылды. Өнеркәсіптегі кәсіпорындарды стратегиялық дамыту бойынша ұсыныстар әзірленді.

Түйін сөздер. Өнеркәсіп, өндіріс, жеміс-көкөніс өнеркәсібі, тұтынушылардың қуаты, алмастыратын өнімдердің қаупі, стратегия, бәсекелестік.

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ОЦЕНКА КОНКУРЕНТОСПОСОБНОСТИ ФРУКТОВЫХ И ОВОЩНЫХ ПРЕДПРИЯТИЙ РЕСПУБЛИКИ КАЗАХСТАН

Аннотация. В статье обсуждается деятельность предприятий, связанных с плодоовощной промышленностью. Роль этого предприятия велика, поскольку он связан с производством, а также с обрабатывающей промышленностью. Была сделана оценка угроз для основных игроков отрасли. Наиболее эффективный метод борьбы с заменителями - построение сильного бренда: четкая дифференциация и дополнительные выгоды от потребления товаров компании, борьба со стандартизацией продукции, технологические усовершенствования, формирование лояльности продукции.

Конкуренция среди существующих конкурентов сводится к желанию улучшить свои позиции на рынке любыми способами, чтобы завоевать рынок потребителей. Острая конкуренция ведет к ценовой конкуренции, увеличению затрат на продвижение товаров, иногда к улучшению качества продукции, увеличению инвестиций в новые разработки. Все это снижает рентабельность отрасли.

Этот подход включает в себя пять конкурентных сил: мощь потребителей, мощь поставщиков, потенциал новых участников в отрасли, угрозу замещающей продукции, конкуренцию в отрасли. Была построена таблица оценки результатов оценки для организаций данной отрасли. Разработаны предложения по стратегическому развитию предприятий в отрасли.

Ключевые слова. Промышленность, производство, плодоовощная промышленность, мощь потребителей, угроза замещающей продукции, стратегия, конкуренция.

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