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COMPETITIVE ANALYSIS OF THE PAPER MARKET IN KAZAKHSTAN

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Abstract: *The article discusses the market of paper and paper products in Kazakhstan, including the companies – main player on the market. The authors presented a brief report on the activities of each of five companies. The aim of the article was to make the analysis of competitors for the subsidiary of “Bumazhniy zavod” LLP on the paper market. A competitive comparative analysis of companies in the Kazakhstan market includes such factors as market share, sales volume, price level, profitability level, product quality, level of technologies, types of advertising used by firms in marketing strategies. In addition, it was identified the main competitive advantages for the subsidiary of “Bumazhniy zavod” LLP in Kazakhstan.*

Keywords: *paper products, paper market, competitiveness, competitors, comparative analysis.*

Main provisions of the article. “Bumazhniy zavod” LLP is one of the key players in the Kazakhstan market of paper and paper products manufacturers. For strategic marketing management, it is necessary to conduct regular market research in the market. The main direction of strategic marketing research is the analysis of competitors. It is necessary to analyze competitors thoroughly and comprehensively, evaluating and comparing the competitive advantages of each competitor.

Introduction. Today it is difficult to find a company that does not focus on its competitors in its activities.

Analysis of competitors is the first step in marketing research conducted before developing the product marketing strategy. It includes a detailed study of main players’ activities on the market, such as price, advertising, assortment analyzes and detailed SWOT analysis. Correct analysis and assessment of competitive environment allows an enterprise to create a sustainable competitive advantage on the market, choose the right communication channels and reduce operational risks.

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Competition management aims to provide the most advantageous positions for gaining or retaining competitive advantages. It is necessary to assess the potential of competitors, evaluate their actions and the degree of competitive threat, and predict the actions of competitors.

Materials and Methods.

During preparing materials, the authors used methods of economic analysis, statistical method of economic research, institutional analysis, and comparative analysis. In addition, authors used theoretical material of domestic and foreign scientists, as well as reports and statements of “Bumazhniy zavod” LLP.

Literature Review. The methods of competitive struggle are extremely diverse and rarely repeated, but of the many techniques used in this struggle, obtaining and using comprehensive information about a competitor is of particular importance, which already provides a competitive advantage. Marketing research of competition and knowledge of competitors, their characteristics are a necessary requirement for effective marketing management. Competitive analysis is an indispensable condition for success in the market.

Competitive analysis – assessment and forecast of the capabilities and actions of competitors based on the study of the collected information and expert opinions

The purpose of the competitive analysis of a market enterprise is to identify the presence and type of competition, assess the intensity of competition, characterize and model competition factors.

There are definitions, the authors of which try to concretize certain areas and goals of competitive analysis within the framework of the concept. Henry Assel’s definition of the term is “an assessment of the strengths and weaknesses of competitors” [1].

According to A.Frenkel, competitive analysis is the study and prediction of competitors’ actions, identification of their potential capabilities, and assessment of the competitiveness of competing goods [2].

It is possible to evaluate not only the competitiveness of a competitor’s goods, but also directly the competitor’s organization; not every study in the field of competitive analysis reveals the intentions of competitors or predicts their actions, since some aim to analyze only the current competitive situation. In other words, it is hardly worth recognizing that it is expedient to specify some areas of research in this area directly in the definition. It would be more correct to focus on universality in the interpretation.

Many authors think that competitive analysis is one of the areas of marketing research conducted at the enterprise with the aim to get information. Among them is Filip Kotler. In particular, F. Kotler in his work identifies competing desires; commodity-generic competitors; commodity-specific competitors; competitor brands [3].

K. Walsh believes that competitor analysis is the collection and processing of data from various sources, and the purpose of this process is to develop management solutions to improve the competitiveness of the organization [4].

Michael Porter presents the list of competitors in the market with five forces: competitors in the current market; potentially new competitors; companies offering substitute products; suppliers and buyers [5].

Competitive analysis allows the firm to identify the main competitors, analyze their strengths and weaknesses, positioning strategy.

Noticing that the ambiguity of approaches to the definition of competitive analysis is reflected in determining the stages of its implementation. In the literature, you can find many of



these options, which differ in the number of stages and the logical sequence of their implementation, the number of directions for studying competitors and the breadth of the tools used for these purposes.

Results and discussion. Let us look at the paper market of Kazakhstan. There are 418 companies engaged in the production of paper and paper products in Kazakhstan, 137 of them are active. Of the total number of organizations:

Large enterprises (with more than 250 employees) – 5;

Medium organizations (from 101 to 250 people) – 3;

Small enterprises (from 5 to 100 people) – 410.

Most of all companies registered in Almaty (141), South Kazakhstan region (49) and Almaty region (41).

Today, subsidiary of “Bumazhniy zavod” LLP is a leader in such areas as pulp and paper, forestry and woodworking industries in the Almaty region of Kazakhstan. The company’s products occupies leading positions on the market of Kazakhstan and represents the largest market share in the country.

Many difficulties occur in the functioning process of “Bumazhniy zavod” LLP, that are associated with the presence of sufficiently strong and competently running competitors.

The most active competitors for “Bumazhniy zavod” LLP are:

“Karina TRADING” LLP:

“Karina TRADING” is the leading enterprise in Kazakhstan and Central Asia, specializing in manufacturing sanitary and hygienic products. More than 40 types of products represent the range of products of this company. All of them are manufactured with the brand “Karina®”.

In almost 20 years of existence, the company has succeeded in such moments as development and implementation of new types of products; reaching a new level in the production of high quality and demanded products; use innovative equipment of high quality.

“SUNPAPER” LLP:

It operates on the market for more than 11 years;

It is Kazakh manufacturer of paper and hygiene products and household chemicals;

The enterprise has firmly established itself not only in Kazakhstan, but also in foreign markets.

“Zavod Gofrotara”:

It produces 8 categories of goods;

The main activity of the enterprise is the production of 3-layer corrugated cardboard and packaging for any industry, as well as the production of tuberous egg trays.

“INTER MULTI SERVIS” LLP:

It operates on the market for more than 12 years;

It is a manufacturer of corrugated cardboard of any brand and complexity in unlimited quantities;

It collaborates with partners such as “LG Electronics” LSC, “Alel Agro” JSC, Алель Арпо»; “Phillip Morris Kazakhstan” LLP, “Berikap” LLP, “Agroproduct” LLP, “NURPAK” LLP, “Chiao Pizza” etc.

Table 1 presents a comparative analysis of the characteristics of competing enterprises producing paper and paper products in Kazakhstan [6].



Table 1 – Comparative analysis of paper producing enterprises

Competing characteristics	“Bumazhniy zavod” LLP	“Sunpaper” LLP:	“Zavod Gofrotara” LLP	“Karina Trading” LLP	“Inter Multi Servis” LLP
Sales volume	high	medium	medium	high	high
Market share, %	15	7	5	70	3
Price level	low	medium	high	low	low
Financial Profitability	high	medium	medium	high	high
Technology level	high	medium	medium	high	medium
Product quality	high	high	high	high	high
Advertising type	TV, radio, press, Internet	TV, press, Internet	TV, radio, press	TV, radio, press, Internet	TV, press, Internet
<i>Note: compiled by author</i>					

Conclusion. Sustainable competitive advantage is the basis on which a successful business is built. A sustainable competitive advantage is the long-term benefit of applying some unique, consumer-value-creating strategy based on a unique combination of in-house resources and abilities that cannot be copied by competitors. It enables businesses to maintain and improve their competitive positions in the market and survive in the fight against competitors for a long time.

The analysis of competitors’ activities is a complex process that requires significant financial, time and labor costs. Almost all outstanding marketing successes of firms are based on the concept of their own best forces against the weaknesses of competitors.

As we can see from analysis of Kazakhstani paper market, “Karina TRADING” LLP is the market leader and has the greatest advantages in all respects. In addition, “INTER MULTI SERVIS” LLP and “SUNPAPER” LLP have good positions.

Summarizing, “Bumazhniy zavod” LLP is a fairly well established and profitable enterprise in this competitive struggle and has great perspective for developing and fighting for better competitive advantages and positions.

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ҚАЗАҚСТАНДАҒЫ ҚАҒАЗ НАРЫҒЫН БӘСЕКЕЛЕСТІК ТАЛДАУ

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Түйін. Мақалада Қазақстандағы қағаз және қағаз өнімдерінің нарығы, оның ішінде нарықтағы негізгі ойыншылар – компаниялар қарастырылады. Автор бес компанияның әрқайсысының қызметі туралы қысқаша есеп берді. Мақаланың мақсаты "Бумажный завод" ЖШС еншілес кәсіпорнының қағаз нарығындағы бәсекелестеріне талдау жүргізу болды. Қазақстандық нарықтағы компаниялардың бәсекеге қабілетті салыстырмалы талдауы фирмалар маркетингтік стратегияларда пайдаланатын нарық үлесі, сату көлемі, баға деңгейі, рентабельділік деңгейі, өнім сапасы, технологиялар деңгейі, жарнама түрлері сияқты факторларды қамтиды. Сонымен қатар, Қазақстандағы "қағаз зауыты" ЖШС еншілес кәсіпорнының негізгі бәсекелестік артықшылықтары анықталды.

Түйін сөздер: қағаз өнімдері, қағаз нарығы, бәсекеге қабілеттілік, бәсекелестер, салыстырмалы талдау.

КОНКУРЕНТНЫЙ АНАЛИЗ РЫНКА БУМАГИ В КАЗАХСТАНЕ

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Резюме. В статье рассматривается рынок бумаги и бумажных изделий в Казахстане, в том числе компании – основные игроки на рынке. Авторы представили краткий отчет о деятельности каждой из пяти компаний. Цель статьи – провести анализ конкурентов дочернего предприятия ТОО «Бумажный завод» на рынке бумаги и бумажных изделий. Конкурентный сравнительный анализ компаний на казахстанском рынке включает такие факторы, как доля рынка, объем продаж, уровень цен, уровень рентабельности, качество продукции, уровень технологий, виды рекламы, используемые фирмами в маркетинговых стратегиях. Кроме того, были определены основные конкурентные преимущества дочернего предприятия ТОО «Бумажный завод» в Казахстане.

Ключевые слова: бумажная продукция, рынок бумаги, конкурентоспособность, конкуренты, сравнительный анализ.

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