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**ODESSA NATIONAL ACADEMY OF
FOOD TECHNOLOGIES**

International Competition of
Student Scientific Works

**BLACK SEA
SCIENCE 2020**
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Odessa National Academy of Food Technologies

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BLACK SEA SCIENCE 2020

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2. ECONOMICS AND **ADMINISTRATION**

FORMATION COMPETITIVENESS ENTERPRISES SPECIALIZING IN THE PRODUCTION OF BREAD AND BAKERY PRODUCTS

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Abstract. *The questions of formation competitiveness enterprises specializing in the production of bread and bakery products are studied, as well as the current state, tendencies and problems of development of the baking industry in Ukraine are analyzed.*

It is established that there is a tendency to decrease the production volume of bakery products in Ukraine, loss of production capacity due to the occupation of part of the territory of the country. The leaders among the regions of Ukraine, identified by Dnipropetrovsk, Kyiv and Kharkiv regions, were identified. It has been found that these products are not deficient at the moment, but studies indicate a strong shadow market segment that does not report to the departments of statistics.

The factors of influence on the level of competitiveness of the baking industry are investigated, where the significant factors are the increase of prices for other foodstuffs, accessibility of purchase, marketing, advertising, positive image of the producer.

In the example of Kharkiv region the main competitors of the baking industry are investigated and the integral indicator of competitiveness for such enterprises is calculated.

Keywords: *competitiveness, level of competitiveness, enterprises specializing in the production of bread and bakery products, culture of nutrition, formation of competitiveness.*

I. Introduction.

Traditionally, bread and bakery products are of particular importance in the culture of Ukrainian nutrition. These products consist about 40% of the total calorie content of the Ukrainian people's diet. The production of bread and bakery products belongs to the strategic branches of our country's economy since not only food but also national security of the country depend on the efficiency of the performance of the enterprises that specialize in bread and bakery products. The social significance of bread, the need for stable and timely supply of qualitative and fresh produce to the population lead to the need to analyze the market for bread and bakery products, as well as to study the competitiveness of the enterprises that specialize in bread and bakery products. Actually, this study is dedicated to these issues.

II. Analytical review of the literature.

A number of scientific works of academic economists have been dedicated to the problems and prospects of the development of bread and bakery industry, in particular these issues have recently been considered by: Vasilchenko O.M., Govorukha Zh.A., Gryshchenko A.M., Davydyuk Yu., Dzyuba O.M., Drobot V.I., Rotated D.V., Kokovskaya S.I., Kostetska N.I., Litvinyuk O.P., Navolskaya N.V., Netyazhuk M.V., Obidina I.I., Oprah O.A., Prokip M.I., Repich T.A., Samilenko N.Y.,

Senishisha L.O., Strunin V.V., Teleshevskaya S.M., Urba S.I. , Fedorova T.V., Filonenko T.M. and others [1-9]. However, the bread and bakery industry is dynamic so that means it is constantly changing, developing and it needs some further researches, and it is also strategically important to study the competitiveness of enterprises that specialize in bread and bakery products.

III. Object, subject and methods of research.

The object of the study is the process of forming the competitiveness of enterprises specialized in the production of bread and bakery products.

The subject of the research is theoretical, methodical and practical questions on formation of competitiveness of the enterprises specializing in the production of bread and bakery products.

Research methods: abstract and logical - in the study of the essence of competitiveness of enterprises specializing in the production of bread and bakery products; systematic - in research and generalization of factors and aspects of competitiveness of enterprises; method of analysis and synthesis - in the study of the formation of competitiveness of enterprises specializing in the production of bread and bakery products; graphical method – for visual display of research results; method of economic and statistical analysis - to analyze the production of bread and bakery products in Ukraine; expert assessments, the method of SPACE analysis.

IV. The results.

The study of condition, problems and prospects for development in bread and bakery market of Ukraine was, is and will remain relevant in the future under any circumstances of country's economic development.

For a better understanding of “bread” situation in Ukraine, it is necessary to examine the statistical information of bakery production from 2010 to 2017. [10, p. 281].

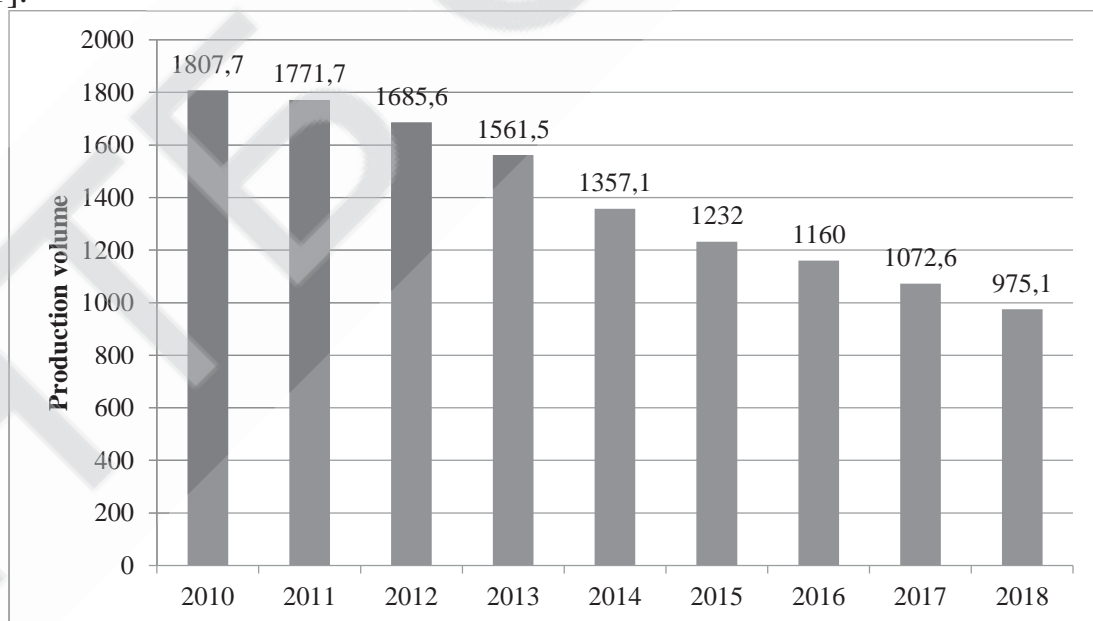


Fig. 1. Dynamics of bread and bakery production in Ukraine in 2010–2018

Thus, there is a tendency of decreasing of bakery products production in Ukraine: from 1807700 tons in 2010 to 975100 tons in 2018, that means that the

production has fallen by 54% in comparison with 2010. From 2010 to 2013 there was a gradual decrease in bakery products production, in 2013 flour production was 1561500 tons, and after 2013 there was a sharp decline: 1357100 tons in 2014, 1232000 tons in 2015, 1160000 tons in 2016, 1072600 tons in 2017, 975100 tons in 2018 [10, p. 281] These changes stem from objective reasons: a production fall due to leaving of Crimean peninsula territories, Donetsk and Luhansk regions, which significantly supported that field (its part in total bakery production in Ukraine in 2010 was 3,4%, 8.9% and 4.1% respectively) from the market. The loss of production capacities due to the occupation of a part of country's territories caused the geographical adjustment in bakery production.

Thus, according to the results of the first half of 2015, bakery production in Donetsk region fell by 69.5% or 47500 tons. As a result, its part in the production fell by almost 6%, and its position on ranking list got worse as it moved from the second to the eleventh place. In Luhansk region, the bakery production decreased almost by eight times. For the sake of clarity, the information about bread and bakery production of different regions are presented below (Fig. 2).

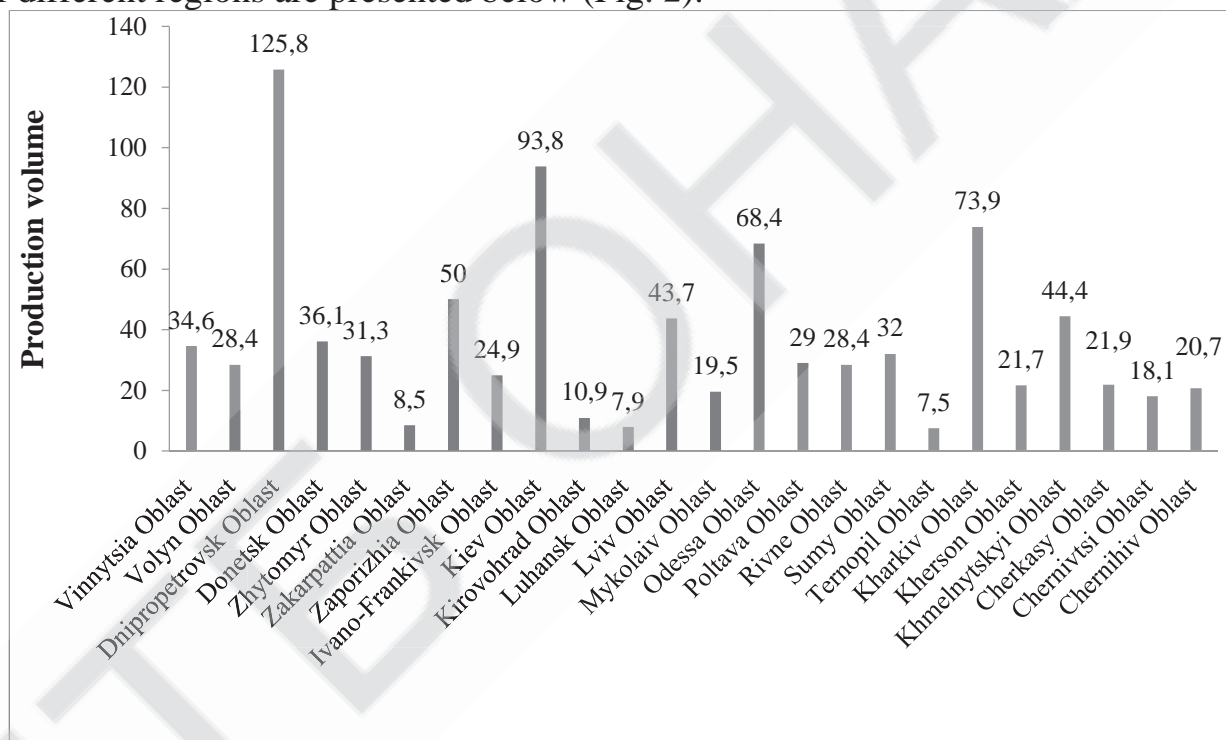


Fig. 2. Bread and bakery production by regions of Ukraine in 2018

In 2018 the leaders among Ukrainian regions were: Dnipropetrovsk region – 125800 tons, Kyiv region – 93800 tons and Kharkiv region – 73900 tons, and Odessa region – 68400 tons and Zaporizhzhia region – 50000 tons The leaders in 2010 were: Dnipropetrovsk region – 186700 tons, Donetsk – 161600 tons and Kharkiv regions – 131300 tons, and Odessa – 93900 tons and Zaporizhzhia regions – 74800 tons [10, p. 281].

Ukraine produces over one million tons of bread and bakery products annually, which does not fully supply Ukrainian population with these products, as bakery production, according to statistics of the State Statistics Service of Ukraine, was 23 kg

per person in 2018, and the actual consumption of bakery production was 100 kg per person [10, p. 99], as it is shown in the chart 1.

Chart 1

Indicators of production and actual consumption of bread and bakery products in Ukraine from 2010 to 2017

Year	Bread production (thousand tons)	Population, thousand people	Production for 1 person, kg	Actual consumption of products per person, kg	Deviation +/- (the production from the consumption)
2010	1807,7	45963	39	111	-72
2011	1771,7	45779	39	100	-61
2012	1685,6	45633	37	109	-72
2013	1561,5	45553	34	108	-74
2014	1357,1	45426	30	109	-79
2015	1232,0	42929	29	103	-74
2016	1160,0	42603	27	101	-74
2017	1072,6	42485	25	101	-76
2018	975,1	42153	23	100	-77

That is, the deviation of consumption over production is (-77 kg). And from 2010 to 2018 there was a decrease in bread production from 1807.7 thousand tons in 2010 to 975.1 thousand tons in 2018, together with the population decreased from 45963 thousand people to 42153 thousand persons, and therefore the value of the production indicator per person also decreased - from 39 kg/person to 23 kg/person. The actual consumption of bread also decreased: from 111 kg per person in 2010 to 100 kg per person in 2018. Production consumption deviations remain at approximately the same level: -72 kg in 2010, -74 kg in 2015 and -77 kg in 2018.

Comparing the actual data of the State Statistics Service of Ukraine with the real state of the bakery products market, we can conclude that there is in fact no shortage of these products. This situation is due to the emergence of a strong shadow market segment: bread is sold in kiosks registered as FOP or without registration at all. Due to this, they are able to reduce the cost of products, which are often made in unsanitary conditions and can not meet any quality standards. But as it is profitable, the shadow market segment accounts for about 60% of all bakery production. Such businesses do not report to statistical departments, which distorts the actual data. In addition, in recent years, one of the causes that led to the decline was the loss of production capacity due to the occupation of part of the country. Also, many supermarkets in Ukraine specialize in the production of their own bakery products, but this production is not fixed. And also it is necessary to consider baking of bakery products at home.

There are many factors that affect the competitiveness of businesses specializing in the production of bread and bakery products. Among which are the external and internal factors [4 p.2-5; 6 p.97, 98]. To external include:

- social (population, sex and age, food culture, income level);
- political and legal (legislative acts, political situation);
- economic (price, income level).

The internal include:

- raw material resources of the enterprise (availability of limited quality raw material resources of the enterprise; type of resource, cost and availability of the resource; market share of the enterprise as a production unit);
- personnel potential of the enterprise (structure and qualification of personnel; number of staff);
- marketing activities (availability of marketing service; availability of information and regulatory and methodological basis of management; image of the enterprise; sales opportunities to expand the geographical boundaries of the market; the presence of an extensive sales system; product quality);
- enterprise strategy (mission statement, long-term goals, paths and decision-making rules for the most effective use of strategic resources, strengths and opportunities, elimination of weaknesses);
- innovation and investment activities (number of research and production staff at the enterprise; costs of research, development and technological innovations; availability of cooperation with scientific units; possibility of profitable attraction of external financial resources; size of internal sources of financing);
- geographical location of the enterprise (access to raw materials; access to transport networks);
- production activity (features of applied technology and technology; level of mechanization and automation of labor; research activity; range, structure and quality of production);
- financial and economic activities (financial reporting standards used; solvency; profitability and profitability).

It should be noted that in recent years the culture of nutrition, which has been heavily influenced by the media, has changed, presenting bread as a high-calorie product whose usefulness is in doubt. Recently, the world trend is a healthy lifestyle, which includes healthy, or as it is called "proper" nutrition, the basis of which is to reduce the consumption of carbohydrates, the content of which exceeds the norm in bread. However, bread and bakery manufacturers have found an approach to such consumers by expanding their range to include non-yeast, gluten-free dietary bakery products. Expansion of the range helps to increase the demand and increase the competitiveness of enterprises specializing in the production of bread and bakery products. Today we see a wide range of bread on the market, not including other bakery products: from "social" to "elite", different flavors - from different flour (wheat, rye, corn, buckwheat), with different additives (bran, raisins, raisins, raisins, raisins, raisins dried apricots, nuts, sesame, poppy, cumin, fenugreek, hot pepper, sunflower seeds, pumpkin seeds, etc.), various shapes and sizes ("brick", loaf, baguette, mini-baguette, round meadow, loaf, pita), whole and half, cut and uncut. Even the most demanding consumer will find something to their taste.

An important factor for both producers and consumers is the price of bread and bakery products. Thus, according to statistics for January 2019, the most expensive bread was in Kiev, and the cheapest in the Odessa region. These data were obtained by the Ukrainian Association of Retailers by calculating the value of the bread basket. The bread basket included 1 kg of wheat bread from the highest grade flour, 1 kg of wheat bread from the first grade flour, 1 kg of rye bread and 0.5 kg of loaf. The most

expensive regions were: Kyiv – 95 UAH and Kyiv region – 81 UAH; Zhytomyr region – 75 UAH; Transcarpathia – 73UAH; Volyn – 71 UAH. The "cheapest" regions are: Odessa region – 63 UAH; Nikolaev – 64 UAH; Dnepropetrovsk – 65 UAH; Lugansk – 65 UAH; Ternopil region – 65 UAH. The intermediate position was occupied by: Donetsk and Cherkasy regions – UAH 71 each, Ivano-Frankivsk, Lviv and Khmelnytsky regions – UAH 70 each, Kirovohrad, Poltava and Kherson regions – UAH 69 each, Zaporizhia, Sumy and Chernihiv regions – UAH 68 each, Vinnytsia, Rivne and Kharkiv – UAH 67 and Chernivtsi – UAH 66 [11].

Thus, by analyzing the state of bread production and the market of this industry, we can summarize the aspects of influence on the level of competitiveness of the bakery industry (Fig. 3) [17, p. 57-61].

Aspects of influence on the level of competitiveness of the baking industry	
<i>cause an increase in consumption</i>	<i>cause a decrease in consumption</i>
- raising prices for other foods	- decrease in population;
- high-level trade organization;	- psychological impact of the media;
- high quality products;	- distribution of household appliances for baking bread at home;
- effective advertising;	- changing the tastes of consumers with the emergence of trends in healthy lifestyles and healthy eating.
- positive image of the manufacturer;	
- expansion of the range;	
- availability of purchase.	

Fig. 3. Aspects of influence on the level of competitiveness of the baking industry

From Fig. 3, we see that one of the main aspects of the impact on competitiveness that causes an increase in product consumption is the increase in prices for other foods. It is also well-known that due to a well-thought-out pricing policy, an important aspect is the affordability of purchases compared to previous years. Important aspects are marketing, advertising, positive image of the manufacturer.

We also emphasize the importance of organizing trade. Let's take this into the example of Kulinichi LLC, which took a good position in the market, taking advantage of such important advantages as comfortable customer service, focusing on a particular consumer, where corporate trade plays a significant role. Kulinichi LLC has created a competitive environment in the bread and bakery industry, thereby displacing small businesses.

Today, the bread and bakery market is filled with products from different manufacturers. In 2017, the main representatives of the domestic bread market were such companies as Lauffer Group (Odessa Loaf, Donbasshlib, Khlibinvest) – 6,45 %, PJSC "Kyivhlib" – 6,42 %, TM "Kulinichi" (Kyiv, Kharkiv) – 4,73 %, PJSC "Concern Khlibprom" (Lviv, Vinnytsia region) – 3,33 %, TM "Khlibodar" (Zaporizhzhia region) – 3,11 % (chart 2) . [12].

The main participants in the bread and bakery market of Ukraine

Supply chain	Number of participants	The main participants
Production	More than 100 bakeries and over 400 mini-bakeries	PJSC "Kyivkhib", LLC "Khibni Investitsii", JSC Concern "Khiboprom", LLC "Kulinichi" Bakery, GK «Formula of taste», GK «Khibodar», Holding Gold Harvest Lauffer Group
Wholesale	More than 100 participants	August-Key LLC, Athena Group LLC, Tema-B LLC, TD Hekta LLC, Alta Vista LLC
Retail	Retail chains, supermarkets, shops, MAFs, food markets	
End consumers	Population in Ukraine	

It is worth noting that the largest baking capacity in Ukraine is owned by the Lauffer Group. The average daily output of bakery products is 800 tons [16]. PJSC "Kyivkhib", a recognized leader of the Ukrainian bakery market, which includes 9 production sites in the capital and the Kyiv region, has a significant competitive position. At its own production capacity, the company produces 750 tons of bakery and 20 tons of pastry a day. Today the company's product range includes 700 items. The Kulinichy trademark, having taken the leading position among national bakeries, has established itself as a worthy producer of quality bread products. Today the company includes 10 specialized baking complexes in Kharkiv, Kyiv and Poltava regions. The productivity of enterprises is 650 tons of bakery products per day [14]. In addition to large companies, the domestic bread and bakery market covers another 400 mini-bakeries with a capacity of 1 ton per year.

In the Kharkiv region, which is among the top three among other regions of Ukraine in the production of bread and bakery products, the volume of bakery products in recent years has decreased from 112426 tons to 73870 tons in 2018 [15].

At the present stage, the competitiveness of enterprises specializing in the production of bread and bakery products is taking place to a greater extent, as explained above, due to such aspects as trade organization and assortment policy. For example, in the Kharkiv region, the leaders of bread production have traditionally been and remain LLC Kulinichi and TD Saltivsky, but in recent years the LLC Novo-Bavarian Khibzavod and LLC Roma have entered the market (Pervomaisk, Kharkiv region). Also in the bakery market we can see such producers as: PJSC "Lyubotinsky Bakery", Osnovyansky Bread. In addition to these enterprises in Kharkiv, you can buy products from neighboring regions, in particular, competitors in this field are the enterprises of LLC Poltava-Khib, LLC Sumy Polyanytsia, and TM Riga Khib, Chernihiv.

A powerful and main competitor of LLC Kulinichi at this time is LLC "Roma", although a few years ago, such competitor was TD Saltivsky, which was transferred to the management company "Korovaevo" for its debts. Saltivskyi as well as LLC Kulinichi had its own trading network - booths with branded trade all over Kharkov, which gradually began to disappear from the market in 2017 due to their

financial situation. In 2018, among other players, the "bakery arena" was released by LLC "Roma", which is located in the city of Pervomaysk in the Kharkiv region and even has establishments of corporate trade in this town, which, in addition to the main products, which are on the shelves of trade establishments of Kharkov, you can also buy additional bakery products (cakes, cookies, burgers, hot dogs, etc.).

Let us determine the current level of competitiveness of LLC Roma in the bakery market for further recommendations for its improvement. To do this, we propose to calculate an integral indicator of competitiveness, which takes into account such factors as: the price of products, the range of products, the duration of existence of the company, the design of packaging, the presence of a network of branded trade, advertising. To estimate the weighted values of these factors, we use a survey method, which was attended by 22 experts (business executives, experts in the baking industry, teachers in economic disciplines, etc.). Yes, we can conclude by analyzing the experts' answers and rounding up the values in chart 3.

Chart 3

Weighting factors of the competitiveness of the baking industry enterprises obtained by the survey method

№	Competitiveness factors	Weight value
1	Product price	0,4
2	Product range	0,3
3	Duration of existence of the enterprise	0,1
4	Packaging design	0,05
5	The presence of branded network	0,1
6	Advertising	0,05

The competitiveness level of Roma LLC is estimated in comparison with LLC Kulinichi, TD Saltivskiy, Novo-Bavarian Khibzavod and Poltava-Khib LLC. For this purpose, experts were asked to evaluate the competitiveness factors of these enterprises on a 5-point scale (chart 4).

Such factor as the duration of existence of the enterprise was estimated depending on the year of establishment of the company: LLC "Roma" – 1992, LLC "Kulinichi" – 1995, TD "Saltivsky" – 2001, LLC "Novo-Bavarian Bread Factory" – 1995 and LLC "Poltava-bread" – 2011. The factor "Availability of corporate trade network" was estimated as follows: LLC "Roma" – 4, LLC "Kulinichi" – 5, TD "Saltivsky" – 4, LLC "Novo-Bavarian" – 1, LLC «Poltava bread» – 1.

We summarize the integrated value of the integrated indicator of competitiveness of the studied enterprises in chart 5.

Experts' results of the survey on the competitiveness factors of in the studied enterprises*

Experts	Competitiveness factors																							
	the price of products						product range						packaging design						advertising					
	R	K	S	N-B	PB		R	K	S	N-B	PB		R	K	S	N-B	PB		R	K	S	N-B	PB	
1	5	5	5	4	5		5	5	4	5	4		4	5	3	5	3		3	5	3	5	2	
2	5	5	5	3	4		5	5	5	4	4		5	5	4	3	4		3	5	4	4	3	
3	4	5	4	4	4		5	5	5	5	5		4	5	3	4	3		3	5	3	5	3	
4	5	5	5	5	4		5	5	5	4	3		5	5	5	5	4		4	5	3	4	2	
5	5	5	5	3	3		5	5	5	4	4		5	5	3	3	3		3	5	3	4	2	
6	4	5	4	4	5		5	5	5	5	3		5	5	3	4	4		4	5	4	5	3	
7	5	4	5	5	4		5	4	4	3	3		5	4	4	5	3		3	5	3	3	4	
8	5	5	5	3	5		4	5	5	4	4		5	5	3	4	3		3	4	3	4	2	
9	5	5	5	4	4		5	5	5	5	3		5	5	3	3	5		4	5	3	5	3	
10	4	5	5	3	4		4	5	5	3	3		5	5	4	4	4		4	5	3	3	2	
11	5	4	5	5	3		5	5	5	4	3		5	5	3	5	3		3	4	4	4	3	
12	5	5	5	3	5		4	5	5	3	5		5	5	3	4	4		3	5	3	5	2	
13	4	4	5	4	4		5	5	4	5	3		5	5	4	3	5		3	5	3	4	3	
14	5	5	4	3	4		5	5	5	4	3		5	5	3	5	3		3	5	3	3	2	
15	5	4	5	3	4		5	4	4	3	3		5	5	3	4	3		3	5	3	4	3	
16	5	5	5	5	4		4	5	5	5	3		5	5	3	3	4		4	5	3	5	3	
17	5	5	5	3	4		5	5	5	4	4		5	5	4	5	3		3	5	3	4	2	
18	5	5	5	5	5		5	5	5	3	3		5	5	3	4	4		4	5	4	3	3	
19	5	5	5	4	4		5	5	4	5	3		5	5	3	4	4		4	5	3	5	2	
20	5	5	5	4	3		5	5	5	4	5		5	4	3	5	3		3	5	3	4	3	
21	5	5	5	5	4		5	5	5	3	3		4	5	3	4	4		4	5	3	3	2	
22	5	5	5	4	4		5	5	5	4	3		5	4	3	5	3		3	5	3	5	2	
Consolidated importance	4,8	4,8	4,9	3,9	4,1		4,8	4,9	4,8	4,0	3,5		4,9	4,9	3,3	4,1	3,6		3,4	4,9	3,2	4,1	2,5	

*Legend: R – Roma, K – Kulinichi, S – Saltivskiy, N-B – New-Bavarian, PB – PoltavaKhlil.

The summary of integrated values of the integrated indicator of competitiveness of the studied enterprises

Enterprises	Competitiveness factors						An integral indicator of competitiveness
	the price of products	product range	duration of existence of the enterprise	packaging design	availability of branded network	availability of branded network	
	Weight value						
	0,4	0,3	0,1	0,05	0,1	0,05	
LLC Roma	4,8	4,8	5	4,9	4	3,4	0,047
LLC Kulinichi	4,8	4,8	4	4,9	5	4,9	0,048
TD Saltivskiyi	4,9	4,8	3	3,3	3	3,2	0,043
LLC "Novo-Bavarian"	3,9	4,0	4	4,1	1	4,1	0,037
LLC Poltava Bread	4,1	3,5	2	3,6	1	2,5	0,033

As can be seen from chart 5, the highest value of the integral indicator of competitiveness is LLC Kulinichi 0,048, however, LLC Roma is not much lower than the value of this indicator 0,047. Saltivskiyi, Novo-Bavarian and Poltava-Khlib have lower competitiveness indicators - 0,043, 0,037 та 0,033. It means that LLC "Roma" can boldly expand the market and reach the level of the whole Kharkiv area with its branded trading network alongside LLC "Kulinichi".

V. Conclusions.

As follows, the production of bread and bakery products in Ukraine is steadily declining. This trend continues in Kharkiv area. However, these data does not take into account the volume of baking at home, in small bakeries, supermarkets and households.

Based on the results of the analysis of the competitiveness of enterprises specializing in the production of bread and bakery products, it can be concluded that the decrease in volumes in Ukraine is due to such factors as: food culture, which is strongly influenced by the media, presenting bread as a high-calorie product the usefulness of which is in doubt. Recently, the world trend is a healthy lifestyle, which includes healthy, or as it is called "proper" nutrition, the basis of which is to reduce the consumption of carbohydrates, the content of which exceeds the norm in bread. However, bread and bakery manufacturers should find an approach to such consumers by expanding the range to include non-dairy, gluten-free dietary bakery products, which will increase the competitiveness of such businesses.

So the competitiveness of enterprises specializing in the production of bread and bakery products is taking place to a greater extent, as has been clarified, due to aspects such as trade organization and assortment policy.

Using the example of the Kharkiv area as the main competitors of the baking industry and calculating the integral competitiveness index, it was found that LLC Kulinichi has the highest value of the integral competitiveness indicator 4,9, but

LLC Roma is not much lower than this figure of 4.815. Saltivskiy, Novo-Bavarian and Poltava-Khlib have lower competitiveness indicators. It means that LLC Roma can boldly expand the market and reach the level of the whole Kharkiv area with its corporate trade network along with LLC Kulinichi.

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