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STRATEGIC ANALYSIS OF LOGISTICS COMPANIES IN THE MARKET OF CONTAINER TRANSPORTATION

ABSTRACT

The article is devoted to the problem of strategic analysis of logistics companies in the market of container transportation. The analysis of tendencies of development of the market of container transportations is carried out. A methodical approach to conducting a strategic analysis of the state and potential of the logistics company, taking into account their specifics. This methodological approach is based on a modified method of analysing the competition of the five forces of competition of Michael Porter. For the implementation of this methodology in practice, evaluation indicators have been developed and proposed for evaluation in the areas of competitive forces, which take into account the specifics of logistics companies. In the context of the introduction of this methodological approach, a comprehensive approach to the strategic analysis of logistics companies was formed, which is based on two stages of evaluation. The first stage is related to the analysis of three parameters that must be taken into account when analysing competition in the market: the level of threat from substitute products; the level of industry competition and the threat of new players. In the context of the analysis of each parameter, evaluation indicators were proposed that take into account the specifics of logistics companies. At the second stage of strategic analysis, a comprehensive assessment of the impact of environmental factors on logistics companies and assessment of their competitiveness is recommended. Combined with the methodology for assessing external factors affecting the industry and provides an opportunity to calculate a summary indicator of the level of competitiveness. This two-stage approach allows you to comprehensively assess and analyse all factors affecting the logistics activities of enterprises.

The proposed methodological approach to the strategic analysis of the state and potential of the logistics company, taking into account their specifics, was implemented on the example of logistics providers of the Black Sea region of Ukraine.

KEYWORDS

strategic analysis, methodological approach, logistics companies, container transportation market

INTRODUCTION

Today, container transportation is the area that occupies the largest share in the market of logistics services. According to the analysis of container traffic statistics, this market tends to increase. Already in 2028, the global container traffic market is expected to reach \$ 15.83 billion. If this result is achieved, the growth rate will be 112.0% from 2020 to 2028. The biggest growth is shown by the Asia-Pacific region, which dominated the container shipping market with a share of 68.1% in 2020. The leadership of the Asia-Pacific region is ensured by the growth of traffic from China and India [3->1].

The growth of container traffic is facilitated by the following factors: application of modern standards of container traffic handling; reduction of terms of carrying out customs procedures; decentralization of control procedures in seaports. This determines the relevance of strategic analysis of logistics companies in the market of container transportation. At the same time, there are many tools for strategic analysis of enterprises, but there is a need to formation a comprehensive methodology for assessing the strategic condition and potential of the logistics company in conditions of high competition and the specifics of logistics services.

The aim of the study is formation of methodical approaches to conducting a strategic analysis of the state and potential of the logistics company, taking into account their specifics.

The methodological basis of the research. The scientific literature pays considerable attention to the development of logistics concepts and logistics systems. The problems of development of the logistic concept of the enterprise are given considerable attention in the scientific works of domestic scientists, among which such scientists as M. Oklander [16 -> 2], E. Krykavsky [11 - 3, 12 - 4], O. Chukurna [5 -> 5], T. Nestorenko [6] have a significant contribution. Thus, M. Oklander [16 - 2] formed the theoretical and applied provisions of logistics mechanisms of adaptation of enterprises to the external environment and proposed the principles and structure of the logistics system of the enterprise. E. Krykavsky substantiated the criteria for classification of logistics costs and proposed a system for estimating their location; by cost carriers; on analytical cost accounts; by phases of the logistics process [11 - 3].

In addition, in the scientific foreign literature, much attention is paid to estimating the cost of logistics operations in the growing role of globalization and integration processes. The growing need for improvement in the field of logistics systems has led to the emergence of a large number of scientific publications by foreign authors. Foreign scientists such as Ronald Lewis [18 -7], Michael O'Guin [15-8], Robert Kaplan and Thomas Johnson [19-9], A. Ostenda et al. [10] have studied the problems of logistics systems at various levels and spheres of activity. Despite the huge contribution to the theory of logistics, there is a need to develop methodological approaches to strategic analysis of the state and potential of the logistics company, taking into account their specifics.

Result of the study. Assessment of the state of development of container traffic in Ukrainian seaports made it possible to conclude that out of 13 Ukrainian seaports, only three were transhipped - Odessa Sea Trade Port, State Stevedoring Company Yuzhny Sea Trade Port and Black Sea Fishing Port. However, since the imposition of martial law in 2022, all Ukrainian ports in the Black Sea region have been blocked.

Today, there are six specialized terminals in Ukrainian ports that handle container cargo [14-11].

However, today only four are involved in containers - two in the port of Odessa (Container Terminal Odesa and Brooklyn-Kyiv Port), TIS KT in the State Stevedoring Company Yuzhny Sea Trade Port and the Black Sea Fishing Port. In 2019, the seaports of Ukraine passed more than 1 million TEU containers, which is 18% more than in 2018. In addition, according to the Administration of Sea Ports of Ukraine, the transshipment of container cargo in Ukraine for the second year in a row shows significant growth, which is several times higher than the world average in the container market.

According to AMPU, the leader in container handling in Ukraine is the terminal of SE «KTO» in Odessa, followed by another terminal of the port of Odessa - «Brooklyn-Kyiv Port», «TIS-KT» in the Yuzhny Sea Trade Port and Black Sea Fishing Port. The AMPU also reports that in 2019, 15 largest shipping companies visited the seaports of Ukraine, accounting for 99.5% of the total volume of containers. In the top three - Maersk Line, CMA CGM, MSC. They provide more than half of the entire container market of Ukraine (53,5%) [21-12, 13, 14, 15].

Based on analytical data, logistics companies need to use analytical tools of strategic analysis, which should be based on the characteristics and trends of the industry.

The proposed methodological approach to the strategic analysis of the state and potential of the logistics company, taking into account their specifics, is based on a modified method of competition analysis by Michael Porter. This approach takes into account the system of indicators for assessing the degree of competition in the industry, which is based on its specific operating conditions. Based on the results of the assessment according to the model of M. Porter, a comprehensive strategic analysis is conducted, which combines the results of the assessment of external factors affecting the industry and provides an opportunity to calculate a generalized indicator of the level of competitiveness.

Thus, it is possible to identify very high prospects for the development of the industry. To determine the prospects for the development of the container transportation system for stevedoring companies in the Ukrainian market, an analysis of the intensity of competition was conducted on the modified model of five competitive forces of Michael Porter. Evaluation indicators have been developed for each area of competition to form an overall assessment.

The analysis of competitive forces according to Porter is most convenient to carry out by means of tables, giving to each parameter the point defining low, average or high degree of influence of a competitive force in branch. The evaluation of parameters is carried out on a three-point scale.

At the first stage the analysis of three parameters which should be considered at the analysis of a competition in the market is carried out: level of threat from substitute goods; the level of industry competition and the threat of new players.

Today, container shipping has become common. Container shipping is one of the most inexpensive types of logistics services. They are used by both large and small companies.

Unified containers significantly speed up loading and unloading operations. They are easy to pick up cargo, and today 70% of international cargo is transported in containers. Therefore, in this case it is unprofitable to use other methods of delivery. Although there are a number of factors that determine the shortcomings of container traffic: this is the complexity of the process, which is due to the change of vehicles. And low speed, because the ship with containers on board cannot move fast. In addition, weather conditions are not always conducive to such transportation.

Therefore, there are alternatives, but customers are reluctant to use them. Based on the above facts, an analysis was made of the level of threat posed by substitute services (substitute services). The results of the analysis are presented in table 1.

Table 1. Assessment of the competitive strength of substitutes (substitute services) [developed by authors]

Evaluation parameter	Comments	Parameter estimation		
		3	2	1
Value for money	Able to provide the same quality at lower prices	Able to provide the same quality at lower prices	Able to provide average quality at reasonable prices	Able to provide average quality at high prices
				1
The willingness of customers to choose substitutes	Are you ready or not to give up container transportation	High readiness	Medium readiness	Low readiness
				1
The amount of consumer spending in the transition to substitutes	Increased costs when using other modes of transportation	Costs will not increase	Moderate increase in costs	Significant increase in costs
				1
FINAL POINTS		3		
3 point		The low threat level from substitute services		
4-6 point		The average level of threat from substitute services		
7-9 point		The high level of threat from substitute services		

Thus, the impact of the competitive strength of substitutes on the container industry is low.

The level of influence of intra-industry competition in the market of container transportation is presented in table 2.

The number of operators in the market of forwarding services is growing steadily. There are both large companies with a turnover of over 10,000 TEU per year and small ones with a turnover of about 100 TEU.

The existence of such companies is influenced by the level of customer trust. Thus, the cost of forwarding services is a very small percentage of the total amount of customs duties and the cost of cargo. However, due to the shaft and small investments, companies will receive sufficient profits to ensure their survival.

In addition, there is fierce price competition in the market. Customers are very price sensitive and easily switch to another company.

Due to the complexity of the container shipping process, only experienced firms with developed connections can engage in this type of logistics.

Table 2. Assessment of the level of intra-industry competition in the container transport market [developed by authors]

Evaluation parameter	Comments	Parameter estimation		
		3	2	1
Number of market 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	The average level of market saturation	Few players
		3		
Market growth rate	The lower the market growth rate, the higher the risk of constant market redistribution	Stagnation or decline in market size	It slows down, but grows	High
				1
The level of service differentiation in the market	The lower the differentiation of the service, the higher the risk of the consumer switching to other companies in the market	Standard services	Standard services for key features, but differs in additional benefits	Services differ significantly
			2	
Restrictions on raising prices	The fewer opportunities to raise prices, the higher the risk of losing profits with ever-increasing costs	Fierce price competition in the market, there are no opportunities to raise prices	There is an opportunity to increase prices only to cover rising costs	There is always the opportunity to raise prices to cover cost growth and increase profits
		3		
FINAL POINTS		9		
4 point		The low level of intra-industry competition		
5-8 point		The average level of intra-industry competition		
9-12 point		The high level of intra-industry competition		

The threat assessment of potential competitors that may enter the market is assessed in Table 3. Easy entry of new competitors will increase the intensity of competition. This can be hampered by high barriers to entry.

Table 3. Estimation of threat from potential competitors or new players in the field of container transportation [developed by authors]

Evaluation parameter	Comments	Parameter estimation		
		3	2	1
1	2	3	4	5
Economies of scale in the provision of services	The greater the volume of services, the greater the savings on fixed costs. At the same time, it is difficult for newcomers to reach large volumes of services	It is absent	It is exists only in the player market	It is important
			2	
Strong brands with a high level of knowledge and loyalty	The stronger existing brands in the industry feel, the harder it is for new players to join it.	there are no big players	2-3 big players hold about 50% of the market	2-3 big players hold more than 80% of the market
			2	

Product differentiation	The higher the variety of goods and services in the industry, the more difficult it is for new players to enter the market and occupy a free niche.	The low level of product diversity	there are micro-niches	all possible niches are occupied by players
			2	
The level of investment and costs to enter the industry	The higher the initial level of investment to enter the industry, the more difficult it is for new players to enter the industry.	low (pays off in 1-3 months of operation)	average (pays off in 6-12 months)	high (pays off in more than 1 year of operation)
			2	
Access to distribution channels	The harder it is to reach the target audience in the market, the lower the attractiveness of the industry	access to the distribution channels is completely open	access to distribution channels requires moderate investment	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, regulation of price levels	there are no restrictive acts by the state	the state interferes in the activities of the industry, but at a low level	the state completely regulates the industry and sets restrictions
			2	
Readiness of existing players to reduce prices	If players can lower prices to maintain market share, this is a significant barrier to entry for new players	the players will not go for price reductions	the big players will not go for price reductions	whenever there is an attempt to introduce a cheaper offer, existing players reduce prices
			2	
The growth rate of the industry	The higher the growth rate of the industry, the more willing new players want to enter the market	high and growing	slowing down	stagnation or decline
		3		
FINAL POINTS		17		
8 point		The low threat of entry of new players		
9-17 point		The average level of threat of entry of new players		
18-24 point		The high level of threat of entry of new players		

The obtained assessment allows us to conclude about the high level of threat of entry of new competitors into the industry.

In fact, many companies are trying to work in the industry, but not many. It mainly employs either large players with appropriate support at the state level, or small companies engaged in the forwarding of containers of a narrow circle, or in general only its subsidiary.

Thus, leaders are very differentiated from outsiders.

Customer impact assessment is given in Table 4. According to the results of the assessment, the threat from customers is at a high level. There are many small customers in the market, but they have a significant impact due to the sensitivity to the price of services. At the same time, they risk, in case of any problems, almost the entire cost of the goods. As such clients are entrepreneurs who are sensitive to prices for services, this trend is taking place.

Table 4. Threat assessment by customers of container services [developed by authors]

Evaluation parameter	Comments	Parameter estimation		
		3	2	1
The share of customers with a large volume of services	If customers are focused and consume services on a large scale, the company will be forced to constantly make concessions to them	more than 80% of sales are accounted for by several customers	A small number of customers hold about 50% of sales	Sales volume is evenly distributed among many customers
				1
Tendency to switch to the services of other companies	The lower the uniqueness of the services, the higher the probability that the buyer will be able to find an alternative and not incur additional risks	the company's services are not unique	The company's services are partly unique, there are excellent features that are important to customers	The company's services are completely unique, there are no analogues
		3		
Price sensitivity	The higher the sensitivity to the price, the higher the probability that the buyer will use the service at a lower price than competitors	the buyer always uses the service with the lowest price	the buyer uses another service only when there is a significant difference in price	the buyer is absolutely not sensitive to price
		3		
Consumers are dissatisfied with the quality of existing services in the market	Dissatisfaction with quality creates hidden demand that can be met by a new market player or competitor	dissatisfaction with main key characteristics of services	dissatisfaction with the secondary characteristics of services	complete satisfaction with quality
			2	
FINAL POINTS		9		
4 point		The low level of threat of customer departure		
5-9 point		The average level of threat of leaving customers		
10-12 point		The high risk of losing customers		

The impact assessment of suppliers is given in Table 5. Suppliers for logistics companies are container manufacturers.

According to the assessment, suppliers do not significantly affect the container industry. This is due to their low share in the cost of services and low concentration.

Table 5. Threat assessment of suppliers for container services [developed by authors]

Evaluation parameter	Comments	Parameter estimation	
		2	1
Number of suppliers and their concentration	The fewer suppliers and the higher their concentration, the higher the probability of unjustified price increases	Small number of suppliers or monopoly	A wide selection of suppliers
			1
Limited resources of suppliers	The higher the limited resources of suppliers, the higher the probability of price increases	limited in volume	unlimited volumes
			1
Switching costs	The higher the cost of switching, the higher the risk of rising prices	the high costs to switch to other suppliers	the low costs to switch to other suppliers
			1
Priority directly for the supplier	The lower the priority of the industry for the supplier, the less attention and effort he invests in it, the higher the risk of poor performance	the low industry priority for the supplier	the high priority industry for the supplier
			1
FINAL POINTS		4	
4 point		The low level of influence of suppliers	
5-6 point		The average level of influence of suppliers	
7-8 point		The high level of influence of suppliers	

Summarizing the results, we can conclude that since competitive forces are evaluated by different characteristics, the number of which does not match, we use linguistic evaluation: low, medium, high. The results of the generalization are presented in table 6.

Table 6. Overall score for 5 forces of competition in the market of container transportation according to the M. Porter model [developed by authors]

Parameter	Value	Description	Directions of works
Threat from substitutes	Low	The transition to substitution services is not appropriate	1. It is recommended to form the advantages of the differentiation strategy. 2. The company's dependence on price competition in the market should be reduced. 3. The main effort should be focused on gaining the trust of customers.
Threats to domestic (existing) competitors	High	The company's market is highly competitive and saturated. There are restrictions on price increases. Differentiation of services is practically absent.	
Threat by new players	Average	The market is quite attractive for new players and especially large ones. However, there are significant barriers to entry	
Threat from customers	Average	Due to the slight differentiation of services, customers easily switch to other companies.	
Threat from suppliers	Low	Providers have a low share in the cost of services	

Thus, the measures proposed by us in general can be defined as the formation of competitive advantages in terms of differentiation strategy. This conclusion is confirmed by the fact that customers are very sensitive to price and at the same time demanding the reliability of the company.

The second stage of the methodological approach is based on a comprehensive assessment of the impact of environmental factors on the enterprise and the assessment of its competitiveness.

In the context of the study, the logistics strategy of container transportation of logistics companies in the Ukrainian market was assessed.

To assess the existing strategy and determine the prospects for the development of the analysed enterprises, a study of the internal environment was carried out, taking into account the opportunities and threats of the external environment, the so-called business environment of their operation. In order to form competitive advantages, not only the prospects of development of the external environment, but also the internal potential of enterprises were analysed. SWOT analysis was used to achieve the set goals (Table 7).

According to the results of the analysis, it can be concluded that the decisive competitive advantage is the price of logistics services. It is due to its leaders that they hold firmly in the market, occupying leading positions. As a rule, leaders are linear agents, which allows them to be significantly inferior to customers in the price of comprehensive services. In addition, the breaking point is an indicator of weak marketing. Businesses that were surveyed should pay more attention to promotion on the Internet, social networks to increase brand awareness.

Then, in order to form significant competitive advantages, in order to further manage them, the assessment of the main players in this market was conducted, the position of each company and the factors that affect it were determined. The most notable is the company "Global Ocean Link", abbreviated "GOL", which for a long time occupies a leading position in the market of freight forwarding services. Another company Olenich Group (OG) was chosen for comparison. Because it is quite different from the leader of "Global Ocean Link", but it is also one of the five leaders. The third company was Ukramarin LLC.

Table 7. SWOT-analysis of enterprises in the container market [developed by authors]

		Opportunities				Threats			Total
		The growth rate of the container transportation industry	Development of cooperation with international companies	Government support for the development of the transport industry	Favorable conditions for export	The emergence of new strong enough competitors	Increase in taxes	Quarantine restrictions on international markets	
1	2	3	4	5	6	7	8	9	10
Importance		5	5	3	4	4	3	5	
Probability		0,9	0,95	0,8	0,7	0,95	0,6	0,9	
Strengths									
Competitive level of product quality and price	4	112,5	112,5	36	90	76	18	90	535
Qualified staff	3	54	95	48	33,6	60,8	21,6	54	367
Existence of connections at the governmental level	4	54	42,75	14,4	33,6	57	10,8	54	266,55
Extensive customer base	5	90	76	38,4	33,6	76	21,6	90	425,6
Weaknesses									
Weak marketing	5	-90	-95	-36	-70	0	-18	-67,5	-376,5
Insufficient number of representative offices	3	-27	-42,75	-14,4	-25,2	-45,6	-16,2	-54	-225,15
Lack of own warehouse	2	-27	-28,5	-4,8	-22,4	-22,8	-7,2	-36	-148,7
Indirect contacts with container lines	4	-72	-38	-19,2	-44,8	-30,4	-14,4	-36	-254,8
Total		207	193,25	110,4	98,4	247	52,2	207	1115,25

These companies were chosen because they are leaders in two large groups in the market of logistics services in the Black Sea region of Ukraine. Global Ocean Link is a line agent of container lines and thus secures its own freight forwarding work, and Olenich Group LLC has been working in the market of freight forwarding services for a long time and has taken its place in the market by providing quality services. We will assess the competitive position of each company using the method of expert evaluations. The results are shown below in table 8.

The competitiveness polygon clearly demonstrates the principles of equilibrium established in the market. In general, the area of competitors' polygons is approximately the same. If one wins at the expense of one competitive advantage, another can occupy its niche at the expense of the other.

The work on the logistics market of Ukraine is based on these principles. And these principles must be taken into account when managing the competitive advantages of each enterprise. As we can see, the most important competitive advantage of Ukramarin LLC is the staff and, as a consequence, the provision of quality customs brokerage services. The most promising competitive advantage for development is the optimization of multimodal transportation. The OG company has the warehouses across Ukraine, the developed motor transport base. GOL is slightly inferior to OG, but also has its own warehouses and vehicles.

The main difference between them is that Olenich Group LLC from the very beginning focused on providing comprehensive services. GOL does not do this very well. The main direction is linear forwarding, ie freight of containers. Ukramarin LLC also offers transshipment and packaging services, mainly for export cargo. However, she does this in the warehouses of Vibo-Trans LLC, for which she has to pay. In addition, warehouses are practically not used for import operations.

Table 8. Assessment of competitive advantages of companies providing logistics services in the Black Sea region of Ukraine [developed by authors]

Competitive advantages	Specific weight	Ukramarin LLC		GOL		OG	
		Valuation	Weighted assessment	Valuation	Weighted assessment	Valuation	Weighted assessment
1. Price for services	0,15	4	0,6	5	0,75	3	0,45
2. Optimization of multimodal transportation	0,2	4	0,8	4	0,8	5	1
3. Brokerage services	0,1	5	0,5	4	0,4	5	0,5
4. Domestic transportation	0,1	4	0,4	5	0,5	5	0,5
5. Linear forwarding	0,1	2	0,2	5	0,5	2	0,2
6. Port forwarding	0,1	4	0,4	4	0,4	5	0,5
7. Image	0,1	4	0,4	5	0,5	5	0,5
8. Staff qualifications	0,15	5	0,75	4	0,6	5	0,75
Total	1	-	4,05	-	4,45	-	4,4

Thus, as can be seen from Table 8, competitive advantages mutually balance companies in the market. For greater clarity, a competitive profile was built (Fig. 1)

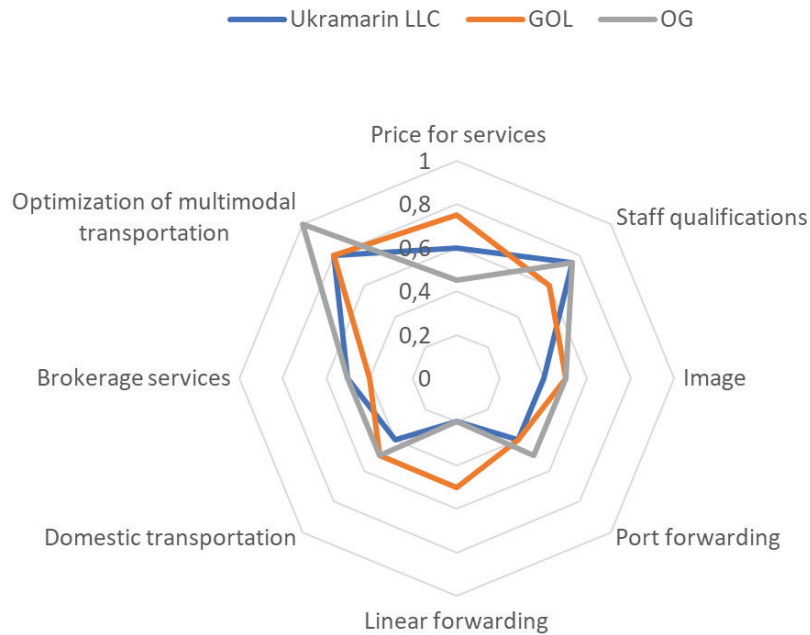


Fig. 1. Polygon of competitiveness of logistics services for major competitors [developed by authors]

Conclusion

The article proposed a methodological approach to conducting a strategic analysis of the state and potential of the logistics company, taking into account their specifics, based on a modified method of analysis of competition by Michael Porter. In the context of this approach, evaluation indicators have been formed in the areas of competitive forces, which take into account the specifics of logistics companies. This made it possible to develop a comprehensive approach to strategic analysis of logistics companies, which is based on a methodology for assessing external factors affecting the industry and provides an opportunity to calculate a summary indicator of the level of competitiveness. This two-stage approach allows you to comprehensively assess and analyse all factors affecting the logistics activities of enterprises.

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ANALIZA STRATEGICZNA PRZEDSIĘBIORSTW LOGISTYCZNYCH NA RYNKU PRZEWOZÓW KONTENEROWYCH

STRESZCZENIE

Artykuł jest poświęcony problemowi analizy tendencji strategicznego rozwoju rynku przewozów kontenerowych w działalności przedsiębiorstw logistycznych. Metodyczne podejście do przeprowadzenia strategicznej analizy stanu i potencjału firmy logistycznej, z uwzględnieniem ich specyfiki, opiera się na zmodyfikowanej metodzie analizy rywalizacji pięciu sił rywalizacji Michaela Portera. W celu realizacji tej metodologii w praktyce, opracowano i zaproponowano do oceny wskaźniki ewaluacyjne w obszarach sił konkurencyjnych, które uwzględniają specyfikę przedsiębiorstw logistycznych. W kontekście wprowadzenia tego podejścia metodologicznego powstało kompleksowe podejście do analizy strategicznej przedsiębiorstw logistycznych, które opiera się na dwóch etapach oceny. Pierwszy etap wiąże się z analizą trzech parametrów, które należy wziąć pod uwagę analizując konkurencję na rynku: poziom zagrożenia ze strony produktów substytucyjnych; poziom konkurencji w branży i zagrożenie ze strony nowych graczy. W kontekście analizy każdego parametru zaproponowano wskaźniki oceny uwzględniające specyfikę przedsiębiorstw logistycznych. Na drugim etapie analizy strategicznej rekomendowana jest kompleksowa ocena wpływu czynników środowiskowych na przedsiębiorstwo logistyczne oraz ocena ich konkurencyjności. W połączeniu z metodologią oceny zewnętrznych czynników wpływających na branżę, pojawia się możliwość obliczenia sumarycznego wskaźnika poziomu konkurencyjności. To dwuetapowe podejście pozwala kompleksowo ocenić i przeanalizować wszystkie czynniki wpływające na działalność logistyczną przedsiębiorstw.

Zaproponowane podejście metodologiczne do strategicznej analizy stanu i potencjału przedsiębiorstw logistycznych, z uwzględnieniem ich specyfiki, zostało wdrożone na przykładzie dostawców usług logistycznych z regionu Morza Czarnego na Ukrainie.

SŁOWA KLUCZOWE

analiza strategiczna, podejście metodologiczne, przedsiębiorstwa logistyczne, rynek przewozów kontenerowych



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