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МАРКЕТИНГОВІ СТРАТЕГІЇ НА ВИБРАНИХ ПОЛЬСЬКИХ ЦЕМЕНТНИХ ЗАВОДАХ НА ФОНІ РОЗВИТКУ БУДІВЕЛЬНОГО СЕКТОРУ

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Будівельний сектор є важливою галуззю економіки, яка істотно впливає на її розвиток. В останні роки спостерігається висока динаміка розвитку цього сектору в Польщі, що переважно визначається розвитком інфраструктури, пов'язаним із організацією Євро-2012, а також будівельними проектами, що реалізуються органами місцевого самоврядування і фінансуються Європейським Союзом. Проаналізована торгівля цементом у Польщі, що супроводжується змінами, які відбуваються у будівельному секторі. Обговорюються маркетингові стратегії, реалізовані протягом кількох років на різних цементних заводах, що функціонують на польському ринку.

Ключові слова: будівельний сектор, маркетингові стратегії, цементні заводи у Польщі.

MARKETING STRATEGIES OF CHOSEN POLISH CEMENT FACTORIES IN THE BACKGROUND OF CONSTRUCTION SECTOR DEVELOPMENT

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The construction sector is a very important branch of economy, substantially influencing its development. In the recent years one can observe a high dynamism of this sector's development in Poland, determined mainly by infrastructure development connected with organizing Euro 2012, as well as construction projects realized by local governments and financed by the European Union. The article presents the analysis of the cement trade in Poland accompanied by the changes occurring in the construction sector. The paper also discusses marketing strategies realized for several years by chosen cement factories operating on Polish market.

Key words: construction sector, marketing strategies, cement factories in Poland.

Problem formulation. Construction is a vital area of economy connected with many of its branches. In the recent years in Poland one can observe a dynamic development of this sector. In the European Union Poland is the country with one of the most important and fastest developing construction markets. Two

factors have had the most important influence on this sector's development, namely infrastructure development connected with organizing Euro 2012 and construction projects realized by local governments with the use of the European Union's funds. The basic material used in the construction industry, both in the house-building one as well as the road and engineering one is cement. The dynamic development of the sector in the recent years has resulted in a large demand for products offered by cement factories. The author of the paper discusses in it marketing strategies which have been applied for several recent years by chosen cement factories operating on Polish market.

In order to function and compete effectively on the dynamically changing market each enterprise should possess its marketing strategy. The aim of creating enterprise's marketing strategy should be to enable the enterprise to build and maintain a competitive advantage over other subjects, a possibility of quick adjustment to the changes occurring in the environment and taking the advantage of the occurring long-term opportunities of development. The properly elaborated marketing strategy should be flexible enough to allow the enterprise to use it on each stage of development and in different, often changing under the influence of external factors situations in given trade, or the whole economy.

Analysis of current research outputs and publications. The literature contains numerous definitions of strategies and marketing strategies as well as derivative definitions, such as long-term planning, strategic planning, development planning, strategic management, etc. According to the definition by A.D. Handler [1, p. 13], strategy is a definition of the main long-term goals of the enterprise and taking such direction of operations and resource allocation which are necessary to achieve these goals. In the domestic literature it is worth quoting the definition by A. Kozminski, in which the author accepts a wide definition of strategy as a consciously accepted and realized consequently in the longer time horizon way of maintaining by the enterprise permanent competitive advantage [2, p. 97].

Several recurring issues may be distinguished in various present definitions of strategy [3, p. 12-13]. They include:

- issue of goals – recognized as each behaviour concentrated on formulating long-term goals,
- issue of planning – any activity the basis of which constitutes planning to use resources in a longer time horizon is considered as a strategic one,
- environment area – any behaviour which leads to obtaining a permanent competitive advantage over the competitive environment in the long-term is recognized as a strategic one,
- problems and range of changes – decisions which cause vital structural changes and changes in the domain of enterprise management.

Assuming that strategy is defined as a plan of action defining main goals of the organization and the ways in which they should be achieved, it can also be understood as a management process consisting of three stages [4, p. 2]:

1. Strategic analysis of the enterprise – a diagnosis of the enterprise, determining current and future chances and threats as well as strengths and weaknesses and evaluating enterprise's strategic position.

2. Strategic planning – generating strategic options, evaluation and selection of the strategy option as a compromise between an attractive option and the one which may possibly be realised. This stage should finish with presenting several options of the strategic plan based on different probability level of future scenarios.

3. Implementation, strategy realization. At this stage the enterprise should make a series of tactical and operational decisions aiming at proper planning of resources indispensable to implement the accepted strategy, determining necessary changes of organizational structures and introducing motivating and control systems.

Formulating and realizing enterprise's strategy may take place on different levels (segments) of its operations, which allows to distinguish the following hierarchically ordered elements constituting the enterprise strategy [5, p. 42-43]:

- global enterprise strategy, which concerns selection of general enterprise goals, in which the enterprise wants to participate,

- strategy of enterprise's particular areas of operations, which should include missions and goals of the economic unit, competence division and determining the way of operations in a given trade,
- functional strategies, answering the question how to realize the two above mentioned strategies, defining the way in which particular functions of the enterprise are realized (production, finances, marketing, B+R activity).

From the enterprise point of view marketing strategies may be analyzed in two ways. In the narrow meaning it will be the enterprise's functional strategy, connected with marketing activities undertaken in the marketing department of a given enterprise. In the broad meaning in turn, marketing strategy refers to marketing activities on all enterprise management levels, from the enterprise's management board through management boards of strategic economic units, to decisions made on the functional level.

According to Ph. Kotler marketing strategies constitute a good selection of goals, types of principles or rules, which in the specified time determine the direction of the enterprise's marketing activities, and thanks to this define volumes, combinations and allocations depending on the changes of market situation (environment conditions and competition) [6, p. 14]. I. Rutkowski thinks that marketing strategies constitute a set of decisions, ways of conduct and market activities undertaken by the enterprise in the process of realizing the goal (goals). That means that the basic elements of every marketing strategy are the target market selection, ways of conduct and activity instruments.

Marketing strategies in the contemporary business may be analyzed in three different sections: as strategies directed at maintaining current sales of frequently bought products, as competition strategies, and as market education strategies. Strategies directed at maintaining current sales have little to do with satisfying the needs of buyers. The enterprise only pretends to be customer-oriented, while in reality it sells what it recognizes as proper or what it is able to produce. Competition strategies are the ones directed at searching for the competitive advantage through observation of competitors' actions. Market education strategies in turn are oriented towards operation dualism: on the one hand towards market segmentation, on the other hand towards its simultaneous creation [7, p. 239-240].

While analyzing enterprise development strategies on the trade level a special stress should be put to the competition theory concept presented in the 1980s by Michael Porter [8, p. 48], where the author suggests two basic strategies:

1. Cost leadership – it is minimizing the cost in comparison with the sector competitors, without decrease in the quality of the manufactured products. This enables enterprises to offer services or products at lower prices.
2. Differentiation, which is distinguishing the offer from the offers of sector competitors with reference to the product itself and pre- or after-sale services. The task of this strategy is to place the enterprise and its offer in a far more positive light than the competition.
3. Concentration strategy which consists in either cost leadership in given activity segments or differentiation level in particular segments.

The choice of the basic (leading) strategy is connected with various risk types and assigning various priorities to activities undertaken by the organization. Each of general strategies means using different resources and different knowledge. The cost leadership strategy requires maintaining high investment level and technological knowledge, precise control of production and distribution cost as well as basic product cost. The differentiation strategy requires extensive knowledge of the marketing domain and technological advancement. The possibility to analyze and predict market trends plays the basic role here. Cooperation among the departments of research and development, production and marketing is also of vital importance. Finally, the concentration strategy assumes thorough knowledge of the chosen market segment's characteristics.

Presentation of main materials. Cement factories in Poland, apart from the fact that they have been operating in the same place for 20 or 30 years, do not resemble the previous industrial conglomerates at all. The cement trade was one of the first totally privatised branches of industry. The privatisation process began in 1993 and was finished before the year 2000. Today, with reference to the technical condition, cement factories which recorded 6 billion PLN worth investments, are in the vanguard of the world's

cement industry. Polish cement factories are characterized primarily by excellent energy effectiveness and minimised influence on natural environment.

The Polish cement industry currently consists of 11 factories producing cement in the full production cycle, two grinding plants, one white cement factory and one aluminous cement factory. The cement trade is fully privatized and cement factories are owned by international groups of producers. The groups possess investment resources, rich organizational experience and extensive intellectual and technical base (Table 1).

Table 1

Factories and ownership structure in the Polish cement industry

Owner/ Group	Factory	Characteristics
Lafarge	Cementownia Małogoszcz Cementownia Kujawy	Full production cycle factory
HeidelbergCement	Cementownia Góraźdze	Full production cycle factory
	Ekocem	Grinding plant
CRH	Cementownia Ożarów Cementownia Rejowiec	Full production cycle factory
Dyckerhoff	Cementownia Nowiny	Full production cycle factory
Cemex	Cementownia Chełm Cementownia Rudniki	Full production cycle factory
	Gdynia	Grinding plant
Miebach/Polen Cement	Cementownia Odra Cementownia Warta	Full production cycle factory
Cementownia Kraków Nowa Huta	Cementownia Nowa Huta	Full production cycle factory
Holcim	Cementownia Wejherowo	White cement producer
Mapei	Górka Cement	Aluminous cement producer

Source. Own analysis based on the publication of Cement Producers Association

The information in the first table shows that the most numerous group of cement factories owners in Poland constitute German concerns (HeidelbergCement, Dyckerhoff, Miebach, Polen Cement), only one factory Cementownia Nowa Huta after a turbulent privatization period and four changes of the owner is presently owned by a Polish capital partnership.

The cement production and sales market in Poland may be considered as established and stable, which is confirmed by the share structure of particular producer groups in the sales of this product (Table 2).

Table 2

Cement groups share in the cement sales market in Poland in the years 2006-2009

Owner/ Group	Share in the cement market sales in the year			
	2006	2007	2008	2009
Lafarge	21%	22%	22%	21%
Heidelberg Cement	24%	25%	25%	26%
CRH	18%	18%	18%	17%
Dyckerhoff	9%	8%	9%	9%
Cemex	15%	16%	15%	14%
Cementownia Kraków Nowa Huta	2%	1%	1%	1%
Miebach/Polen Cement	11%	10%	11%	13%

Source. Own analysis based on the publication of Cement Producers Association

In the years 2006 – 2009 the position of the cement trade leader occupied the HeidelbergCement concerns, the owner of Góraźdze cement factory and the grinding plant Ekocem. Its market share in this period was from 24% to 26%. The Lafarge concern was permanently in the second place in this period (Małogoszcz and Kujawy cement factories).

Data presented in Table 2 shows that structure of the market in the analyzed period practically does not change, thus, it can be stated that the producers have gained a certain level of market share through proper marketing strategy application and the level is maintained or even, as it is the case with Odra and Warta joined group of cement factories, slightly improved.

A relatively stable level of the cement market structure in Poland was undoubtedly influenced by the favourable economic conjuncture and connected with it cement production and sales (Table 3).

In the years 2006-2011 we can observe a dynamic growth of both cement production and sales. The highest index of cement production and sales was recorded in the years 2006, 2007 and 2011, where it reached over 20%. Only in 2009 in comparison to the previous year the decrease in the production and sales of cement in Poland took place, which was connected with the economic slowdown that happened in Poland in 2009 (Picture 1). The close correlation that occurs between the results of the cement trade and the economic conjuncture results from the fact that cement factories intend majority of their production (97,3%) for the domestic market. In 2009 the sector recorded production decrease by 10,5%. Sales decrease of the sector in comparison to the year 2008 was exactly 10%.

Table 3

Cement industry results in Poland [figures in thousands of tonnes] in the years 2006-2011

Year	2006	2007	2008	2009	2010	2011
Clinker production	11163,1	13 109,4	12 380,2	10 650,8	11 703,2	13 565,5
Cement production	14 630,9	16796,7	16 973,5	15 197,3	15 521,4	18 596,3
Production dynamism (previous year=100%)	118,5%	114,8%	101,1%	89,5%	102,1%	119,8%
Domestic cement sales	14 409,2	16 691,4	16 861,1	15 096,7	15 398,3	18 678,0
Production dynamism (previous year=100%)	121,6%	115,8%	101,0%	90,0 %	102,0%	121,3%
Cement use	14 522	16 800	17 120	15 325	15 500	19 000
Cement export	417,1	305,6	370,1	423,4	344,1	315,3
Clinker export	676,6	181,7	177,4	143,9	134,3	42,7

Source. Own analysis based on the publication of Cement Producers Association

The main power of cement production and sales in Poland was the economic conjuncture and connected with it good situation in the whole construction sector (Figure 1).

Dynamism of building and assembling production growth in the years 2006-2011 was generally above the GDP growth pace (in current prices). Determinant of this development was revival of the conjuncture in Poland and rapid growth of road-infrastructure investments caused by Poland's accession to the European Union. The world economic crisis which began in 2008 slowed down the fast development of the construction sector. However, access to resources from the European funds and Euro 2012 projects, connected primarily with engineering and road construction, allowed the construction sector as well as the cement trade and the whole economy to overcome the temporary meltdown.

While analyzing the operations of Polish cement factories in recent years in the trade grasp, it is clearly visible that the basic strategy undertaken and realized by particular enterprises is predominantly the cost leadership strategy, connected with minimizing the cost of clinker cement burn, which is the basic ingredient in the cement production.

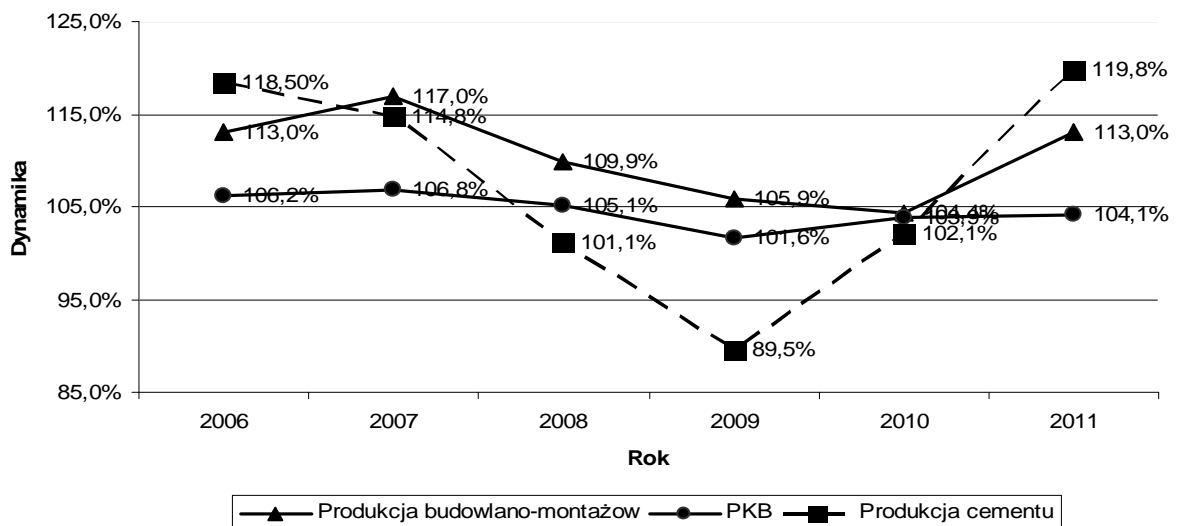


Figure 1. Dynamism of building and assembling production changes and cement production in Poland in the background of GDP (year on year)
 Source. Own analysis based on the publication of Cement Producers Association

Presently the technology of cement production in Poland is based on the modern, so called dry method of production. This technology is characterized by about 50% lower demand for heat energy than the technology of clinker burn in the kilns of the wet method. Minimizing the use of heat energy to burn clinker is of vital importance for the producers, as the cost of fuel purchase is the most expensive element in the cost of cement production. The process of production lines modernization from the wet to dry method occurred in Polish cement factories at different pace, e.g. in Chełm cement factory, which currently belongs to the Cemex group it took place in 1999, in Odra cement factory in the same year and in Warta cement factory the process of complete modernization with close-down of the wet-method production line took place in 2009.

Another method to limit production costs is energy recovery of waste, that is replacing fossil fuels in the clinker burn process with alternative fuels. The basic stimulators of this process are economic conditions, but also the cement industry's activities to protect the environment. In 2010 the industry obtained about 40% of heat energy necessary to burn clinker from using alternative fuels. In 2008 25,5%, in 2005 13,9%, and in 2004 about 10% of heat energy to burn clinker was obtained from alternative fuels. The basic alternative fuel used by cement factories is 191210 alternative fuel, to a lesser extent used tyres and rubber waste, plastics, wood industry waste and sludge are also used. Currently all Polish cement factories possess systems and licences for co-combustion of alternative fuels. The cost leader among Polish cement factories with respect to substituting fossil fuels with alternative ones are plants in Chełmno and Rudniki where the substitution indexes are respectively 80% and 50%.

Co-combustion of used tyres in the process of cement clinker burn was begun by Góraźdże cement factory, presently the process comprises as well the following cement factories: Warta, Małogoszcz, Nowiny, Chełm and Kujawy.

Apart from the trade grasp of marketing strategies applied by Polish cement factories it is also worth attempting to analyze strategies with reference to particular organizational areas of cement factories. In this grasp the following marketing strategies can be distinguished in the enterprise [9, p. 70-72]:

- global enterprise strategy, which reflects the direction, pace and the way of development of the whole company,
- strategies of particular areas of activity, which consist in determining the scope of the given area of economic activity, selection of the type of competitive advantage and defining the kind of operations on the given market,

– functional (marketing) strategies, which define the way in which a given function (marketing) is supposed to help obtain a competitive advantage and consist in integration and coordination of marketing functions with other functions of the enterprise.

The development strategy of Odra cement factory states that one of the strategic goals of the enterprise is to use modern management systems and there are two superior values in the factory's activity: the highest quality of the services rendered and care for the customer, employees and the natural environment. Development activities resulting from the enterprise's strategy take into consideration, among others:

- reducing pollution emission, noise and the amount of waste produced,
- employee development aimed at increase of awareness with reference to care for environment and improvement of working conditions,
- pursuit of health and safety level improvement and accordance with law regulations and preventing accidents at work [10].

According to the global strategy of Warta cement factory, the basic goal of the enterprise's operations is development of the trade offer, constant quality improvement of manufactured products and rendered services, developing distribution network and strengthening the brand on the building materials market. Thanks to well-organized distribution network, enterprise's products are available in the whole territory of Poland [11].

The Góraźdze Group which includes Góraźdze cement factory and grinding plant Ekocem, bases its development strategy on the concept of balanced development. According to this concept the operation of this group is based on three pillars of balanced development: economic one, ecological one and social responsibility, creating added value for customers, employees, contractors and shareholders. The enterprise constantly works on minimizing the influence on environment and reasonably manages natural resources which are the basis of the economic activities of enterprises creating the Góraźdze Group. As a socially responsible enterprise it works on creating secure work positions for its employees and cares for good relationships with its enterprises' neighbours participating actively in the lives of local communities. The most important goals and long-term commitments are included in the following six areas of operations:

- employee security and health,
- biodiversity protection,
- balanced construction,
- use of waste and alternative fuels,
- climate protection,
- reducing other influences on environment.

The CEMEX concern and co-creating it cement factories Chełm and Rudniki also base their development strategy on the concept of balanced development realized through building balanced activity, being the employer and neighbour of choice, being the leader of balanced development in the construction trade and contribution to creating a better society and planet. This vision is recorded in the Mission, Values and Ethical Code of CEMEX and it comprises all groups of stakeholders – employees, communities, trade partners and widely understood society [12].

The idea of balanced development, as an important element of constant development, is also implemented by the cement factories of the Lafarge Group. The goals of the group in the scope of balanced development concern three main areas [13]:

- people (health security and protection, variety, volunteering, work positions creation),
- balanced construction (cheap and balanced housing, balanced products and services),
- closed circuit economy development (emission of CO₂, alternative fuels, material recycling).

Conclusions and perspectives for further research. The analysis of the cement trade has shown that within recent years individual cement factories maintain stable market position. This proves that all

enterprises made a similar use of the favourable conjuncture connected with the dynamic development of the construction sector in Poland.

Specificity of the product offered by cement factories, connected with the fact that cement is manufactured in accordance with detailed Polish and European technical and technological standards, causes that the basic strategy realized by particular cement factories is the cost leadership strategy in the trade. The detailed strategies in turn are based on the balanced development concept with particular emphasis on social and environmental aspect.

Further studies concerning marketing strategies realized by cement factories in Poland should be directed at analysis of detailed strategies which are applied by individual cement factories (taking into consideration their operations within these strategies) and their influence on the market position of the enterprise and its perception by the local environment and the trade.

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