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NAS RK is pleased to announce that Bulletin of NAS RK scientific journal has been accepted for indexing in the Emerging Sources Citation Index, a new edition of Web of Science. Content in this index is under consideration by Clarivate Analytics to be accepted in the Science Citation Index Expanded, the Social Sciences Citation Index, and the Arts & Humanities Citation Index. The quality and depth of content Web of Science offers to researchers, authors, publishers, and institutions sets it apart from other research databases. The inclusion of Bulletin of NAS RK in the Emerging Sources Citation Index demonstrates our dedication to providing the most relevant and influential multidiscipline content to our community.

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EVALUATION AND DEVELOPMENT OF THE MEAT INDUSTRY IN KAZAKHSTAN AND ABROAD

Abstract: in the meat balance of Kazakhstan, the defining place belongs to beef, which cannot be replaced by other types of meat, since each of them has specific taste qualities, amino acid composition and nutritional value. However, a sharp decline in the production of beef products of cattle breeding during the years of market transformations led to a significant reduction in the consumption of beef and veal by the population against the background of a decrease in the supply of domestic meat and a significant increase in its import supplies in frozen form, mainly from far-abroad countries. As a result of increased competition between producers of certain types of meat, beef producers were not in the best economic position.

The functioning of the market of meat products of cattle breeding is complicated due to a sharp reduction in state support for the industry, the discrepancy in prices for meat products of cattle breeding and the material elements of the costs of its production, the violation of economic relations between economic entities of the market, the fall in the effective demand of the population.

The urgency of solving the problem of the development of the domestic meat market increases due to the loss of Kazakhstan's food security for this type of food.

The purpose of the study was to develop theoretical, methodological and methodological provisions of recommendations for the development of the market of meat products of cattle breeding in Kazakhstan.

The object of the study was agricultural producers and meat processing enterprises.

In order to successfully compete in the domestic and foreign markets, agribusiness enterprises must ensure the production of competitive products, which is associated with one of the economic problems of the processing industries of the agro-industrial complex, which also includes the meat processing subcomplex.

The scientific novelty is as follows: the theoretical foundations of the functioning of the market of meat and meat products as a complex and dynamically developing multifunctional production and economic system are revealed.

Key words: meat industry of the agro-industrial complex, cattle, meat, meat products, sausage products, semi-finished products, canned food.

Introduction. The Meat Market occupies a special place in the economy of the agro-industrial complex, as it is the basis for ensuring food security and represents the economic interests of producers and consumers of meat and meat products. The solvent demand of the population for meat products is an economic regulator, the process of self-regulation of the meat products market is carried out in a competitive environment. Currently, one of the main directions of development of the meat products market is to increase the volume of production of high-quality final products.

The distinctive features of the market determine the strategic direction of its development, which makes it possible to increase the production rate of competitive meat products within the framework of the functioning of the region and in accordance with natural conditions by managing the quality of products and reducing costs at all stages of product distribution.

One of the main directions of the development of the meat market of the Turkestan region is to improve the commodity policy, expand the range of meat products, produce high-quality products, increase the shelf life, that is, increase the competitiveness of domestic meat products. Therefore, the development of the market should be carried out simultaneously in a number of areas that ensure the ability to respond in a timely manner to changes in demand in the market.

Materials and methods.

The characteristic features of a developed market also apply to the market of meat products, which are the most important indicators of the level and quality of life of the population, the main indicators of the development of the market of meat and meat products:

- stable supply of meat products, proportional to the saturated and stable demand for products at prices, assortment, volume and quality; active state support for domestic agricultural producers;
- objective formation of market prices for meat and meat products in a competitive environment;
- constant coordination of economic entities of the market with each other with increased competition between them;
- availability of a well-developed production and market infrastructure;
- establishment of optimal territorial and industrial proportions, unhindered movement of meat raw materials from its producers to consumers.

For the market of pure competition, which includes the market of agricultural products, there is a distinctive feature in this market there are many enterprises operating, each owns a small market share, but the enterprises can not influence the level of current prices.

External factors included: economic factors, analysis of competitors ' strategies, market conditions, and consumers of meat products. The key internal factors of the meat subcomplex are the competitiveness of products, the assortment, the quality management system, the company's development strategy, and the pricing policy. Effective enterprise management involves creating conditions in the existing market in which the enterprise needs to produce and sell only those goods for which there is a need, and if there is no need, then create it. Quality and product range management within the framework of commodity policy management is one of the most important activities of enterprises in the meat products market, since meat products are in high demand among the population.

The functioning and development of agri-food markets, first of all, is determined by its inherent specifics, the main problem of which is to increase the commodity resources of agricultural products, raw materials and food due to the possibilities of its own production, to expand their range and improve quality while reducing the costs of production and delivery to consumers.

In the context of increasing economic independence of the regions, the role of the agri-food market of the region in providing food to the local population increases. The purpose of its functioning can be defined as providing the population of its territory with food products that are affordable in price, volume, assortment and quality with active participation in interregional and foreign trade activities.

The paper uses the methods of modeling and comparative analysis. To solve individual tasks, the methods of the «tree» of goals and expert assessments were used. The information and empirical base of the research is the normative legal acts of the regional and municipal levels; official data of the republican and regional authorities; methodological, scientific, educational and reference literature, materials of the Internet, as well as research conducted by the authors.

The methodological study is a general method of scientific knowledge-analysis and synthesis, Content-media analysis of sociography, a system-comparative method that allows us to determine the genesis, sequence and functioning of the stages of the development of a meat hub within the framework of the pandemic, the attractiveness and effectiveness of adapting foreign experience in the management of a meat hub in Kazakhstan.

Results and discussion. After poultry and pork, beef is the third most popular type of meat in the world. In the global volume of meat production of all types, the specific weight of cattle meat is about 21%.

The number of cattle in the world is about one billion heads. More than 60 % of the livestock is accounted for by three countries-India, Brazil and China, Russia and Belarus-2.3%.

In the world, the share of beef cattle accounts for 40 % of the livestock, respectively, 60% is dairy cattle. Beef cattle production accounts for about 55% of the world's beef production. In the United States, beef cattle account for 78% of the cattle population, in Canada-85%, in Australia-92%. The average slaughter weight of one head of cattle in the United States is 316 kg, in Canada-308 kg, the yield of meat per head of cattle is 115 and 117 kg, respectively. Meat cattle breeding is also developing intensively in European countries: in France, meat breeds account for 46% of the total livestock, in Italy-24%, in the UK-39%, in Denmark-14%. A number of countries have created their own breeding reproducers of beef cattle. The main counterparties in the beef market are the United States, Brazil, and China, which provide more than 40% of global production. The share of the EAEU in world production is only 3.7%. In the short term, China is projected to grow beef production by 1.4%. On the one hand, stable domestic prices attract investors to the industry, on the other hand, low milk prices and reduced income in the dairy industry contribute to an increase in the slaughter of dairy herds.

In North America, production is expected to increase mainly due to the United States, where a record high of 12.1 million tons is forecast for 2020. In Australia and New Zealand, the increase in production is projected to be largely due to an increase in the slaughter weight of livestock. In the EU, an increase in production is also expected, due to an increase in the slaughter of dairy cattle, which is taking place as part of the ongoing restructuring of the dairy industry. In Russia, due to the lack of profitability of the industry and as a result of the lack of investment, production is projected to decline by almost 2% to 1.6 million tons. The highest consumption of beef per capita in Argentina – 55.5 kg, Brazil-39.3 kg and the United States-36.2 kg. There is also a high level of consumption in Australia, Bermuda, French Polynesia and Canada – 30-33 kg. The lowest beef consumption is in Liberia (0.8 kg), India (0.8 kg), the Democratic People's Republic of Korea (0.9 kg), the People's Republic of Bangladesh (1.3 kg), Ghana (1.1 kg), the Republic of Moldova (1.56 kg). In China, the world's largest producer, per capita consumption is only 5.3 kg. Over the period 2000-2013, consumption increased by only 1.3 kg.

The main beef exporters, providing 47% of the world's supply, are India, Australia, Brazil, and the United States. Belarus ranks 13th in the ranking of exporting countries (its share in global exports is 1.7%). In 2019, 8.9 million tons of beef were exported to the world market, which exceeded the 2015 figure by 13 %. India and Brazil demonstrate high export growth rates-by 22% and 14%, respectively. In the short term, global beef exports are expected to increase, mainly due to these countries. However, in each of these countries, the current situation and factors affecting the prospects for production and trade development are different. According to forecasts, India will retain its leading position in the world ranking of beef exporters in the near future.

The prospects for Brazil, which occupies a dominant position in the European and Middle Eastern markets, are associated with the expansion of market access to China and the United States. At the end of 2019, the United States and Brazil signed an agreement under which Brazil, along with exporting fresh and frozen beef, can also supply processed meat products to the United States. Favorable forecasts for Brazilian exports are due to the fall in the Brazilian real. In 2020, the United States will maintain its ranking as a beef exporting country. In 2019 (after falling in 2018), U.S. beef exports increased as a result of increased production. Currently, the United States does not directly supply beef to China. Unofficial U.S. beef exports to this country go through Hong Kong and Vietnam. In the fall of 2019, China announced its readiness to import beef from the United States. However, to date, there is no agreement, and the status of these intentions is unclear.

The development of beef cattle breeding in the last decade has been influenced by structural changes in such areas as improving the genetics and health of animals, as well as improving organizational and management processes. What is the consequence of increased international flows of investment in cattle breeding and technologies in the meat processing industry, especially in those markets where there is high growth, or in regions with low production costs.It is assumed that these trends will continue in the future, leading to changes in the structure of production costs in industrialized and developing countries. Changes in foreign policy in accordance with WTO requirements have led to a reduction in export subsidies and increased access to international markets. This has contributed to an increase in trade flows and the number of participants from developing countries as exporters.

As a result of the irrational use of available resources, the specific features of the livestock industry, and the low level of animal productivity, the volumes of meat products produced do not meet the scientifically based standards of consumption per capita at the expense of their own production. Thus, the actual consumption of meat per capita in 2020 was 73 kg, including at the expense of own production – 53 kg, the total need for medical (physiological) consumption standards – 1451 thousand tons and own production – 930 thousand tons (64.1%) [1].

Meat processing enterprises of the republic processed 335 thousand tons of meat in 2019, which accounted for 24.2% of the total volume of its production. The loading of meat processing enterprises for the production of sausage products was at the level of 28.7%, chilled poultry meat – 29.3%, canned meat and meat – growing products-60.7%. The volume of exports of all meat and meat products in 2016 amounted to 14.0 thousand tons, imports-189 thousand tons, including poultry meat-162 thousand tons (86%).

The capacity of meat processing enterprises for the production of sausage products in 2019 was 103.2 thousand tons per year, chilled poultry meat-145.5 thousand tons, canned meat and meat-growing products-16.8 thousand tons [2].

Imports of sausage products for the same period – at the level of 33.2 thousand tons, canned meat and meat products – 4.8 thousand tons.

The problems that have a direct impact on ensuring food security are, first of all, low crop yields and the productivity of animals and poultry. As a result, the feed consumption per conditional head in 2019 was equal to 14 ck units, which is 2 times lower than zootechnical standards. The share of breeding stock of animals and poultry remains low (cattle-10.6%, sheep-15.1%, pigs-19.9%, poultry-17.1%).

In general, the average live weight of one head of cattle sold for slaughter for all categories of farms is currently 301 kg, including 344 kg for agricultural formations, 307 kg for peasant (farmer) farms, and 319 kg for personal subsidiary farms of the population.

The share of meat production of all types in the total volume for all categories of farms in 2016 was: in agricultural enterprises – 19.7%, k(f)x-20.4%, households - 59.9%.

It should be noted that the production of meat products in agricultural enterprises is carried out using intensive technologies, in peasant (farm) farms and especially personal subsidiary farms - using extensive technologies [3].

One of the reasons for this situation is the lack of development of the system of procurement and promotion of agricultural products and, above all, meat – from agricultural producers to sales markets, including meat processing enterprises. Low purchase prices for products do not stimulate the growth of production volumes, which leads to a low share of domestic raw materials and a high share of imports. In 2019, the share of imports of sausage products was (46%), meat and canned meat-40%.

The products of small and medium-sized producers are noticeably inferior in quality and cannot successfully compete with foreign suppliers.

The organization of its own meat processing due to lack of funds, the need for high costs, the lack of its own retail network negatively affects the level of production of processed products.

Domestic meat processing enterprises prefer to use imported raw materials-frozen meat. The main reason is low prices, hence the low quality of meat, which is in demand by the meat industry. These factors objectively contribute to a lower cost of imported meat, due to savings on capital construction, lower feed production costs.

The cost of beef in Kazakhstan is 2 times higher than in Australia, the EU countries, and several times higher than in Brazil and Argentina. For pork, the cost of domestic products exceeds the price level in Brazil by 2.9 times and in the EU countries-by 12%. The cost of poultry meat in Kazakhstan is also 3 times higher than the cost of production in the importing countries on average [4].

It should be noted that meat processing increases the efficiency of output products, increases its competitiveness in the domestic and foreign markets.

One of the priorities for ensuring national food security and maintaining the high export potential of agricultural products is to strengthen the role of the state in the agricultural sector [5].

In the system of state support for the development of beef cattle breeding, a positive increase in budget support for 2019-2020 is 2 times, while the main amount of budget funds is focused on increasing the genetic potential of beef cattle – 68%, including breeding breeding work, including commercial cattle - 47.9%, the purchase of breeding cattle-20.7%, of which foreign selection-1.5%, and improving productivity and product quality-22.4%.

The existing methods of state financial support in the production and processing of meat do not take into account the principles of recoupment of budget funds.

In this regard, there is a need to change the forms and methods of stimulating an increase in the productivity of meat production and the level of payback in all regions of Kazakhstan based on the experience of foreign countries [6].

In the field of beef cattle breeding, investment subsidies are provided primarily to agricultural cooperatives for the purchase of machinery and equipment, which are classified as the first group of priority areas and the standard for reimbursement of investment investments is 50%.

The purchase of machinery and equipment for processing, harvesting, transportation of meat and meat products, primary processing of hides and wool are assigned to the second group, with a subsidy rate of no more than 30% [7].

Effective use of the genetic resources of the herd, aimed at maximizing the productive potential of animals, increases the profitability of production, reduces the payback period of investment and makes the industry more resistant to various crisis phenomena in the economy. Therefore, the improvement of state support measures for selection and breeding work contributes to an increase not only in the industry, but also in the national economic effect.

State support for the development of beef cattle breeding in 2016 amounted to 43.4 billion tenge, or 51 % of the funds allocated to animal husbandry to support selection and breeding work.

In Kazakhstan, the main share of beef cattle is concentrated in peasant (farm) farms – 53.2% and households-29.1%. In agricultural enterprises, where mainly breeding work is carried out, 17.8% of the population is concentrated. %.

In 2020, the level of provision of the population with meat products was 77%, including beef-86.2%, lamb-52.8%, pork-25.2%, poultry meat-91.5%.

One of the factors hindering the effective development of beef cattle breeding in the Republic of Kazakhstan is the low level of coverage of beef cattle by breeding work, which in 2016 amounted to 55.4%, i.e. half of the available beef cattle remains outside of breeding work.

As a result, the yield of calves per head of cattle does not reach 70%, the average live weight of cattle is 320-340 kg against 450-500 kg, which is necessary for profitable beef cattle breeding.

The lack of regulation of economic relations in the «agricultural producer-processing-trade» chain leads to the fact that the share of farms that raise beef cattle in the retail price of beef is 20-25%, and in countries with developed beef cattle breeding – 40-45%, while the level of its state support in the total cost is 10-15%.

In order to conduct effective interaction between producers of raw materials, processing and marketing organizations, allowing to reduce consumer prices for food products of domestic production, it is proposed to develop a price mechanism. For each type of agricultural product that is subject to price regulation, three different types of prices should be set: target, threshold and intervention.

Meat processing enterprises faced a number of problems related to the shortage of domestic raw materials, the irrational use of its secondary reserves, and the need to reduce losses.

To increase the investment attractiveness of the meat processing industry, it is necessary to solve the economic problems of coordinating inter-industry relations related to attracting investment resources and their targeted use [9,10].

In order for the economy of the meat processing industry to meet the market conditions of management, the improvement of the living standard of the population requires coordinated actions of the state and business.

According to calculations, in the structure of subsidies, the share of the cost of costs for the development of livestock breeding, improving livestock productivity and product quality by 2021 will be 24%, for the reimbursement of part of the costs of investment investments-14.7%.

At the same time, the cost of meat of all types will increase by 5.5%, cattle meat – will decrease by 9.1% (due to increased productivity and the introduction of scientifically based technologies), the cost of sheep and goat meat will increase by 9.2%, pigs – by 21%, poultry meat – by 24.8%.

The reduction in the cost of meat of all types is influenced by state financial support. Taking into account the prevailing prices, the level of profitability (payback) of the products sold will increase by 1.8 times for meat of all types.

The main directions of development of the meat industry should include: reducing production costs, increasing the specific weight of the final product, its range, the level of standardization to increase the competitiveness of production.

It is necessary to form a specialized zone for the production of cattle meat, focused on export on the basis of the development of cattle breeding, which has natural forage lands. By creating a network of feedlots, it is necessary to provide for the export of high-quality beef, creating a network of meat processing enterprises.

Calculations show that regional development institutions, trade and logistics and wholesale distribution centers should be organized to form the infrastructure for selling meat products.

Conclusion. In order to effectively use the production capacity of the meat processing industry, it is necessary to develop a mechanism for increasing meat harvesting.

Modernization of existing capacities and construction of meat processing plants is required to increase the competitiveness of the products produced.

The main directions of the development of relations between agricultural producers and processing enterprises in the republic are the improvement of pricing mechanisms, contractual relations, state support for producers of meat products, the expansion of the network of market infrastructure that provides technical, technological and organizational management in the continuity of providing the consumer.

A significant role in establishing mutually beneficial economic relations in the production and processing of meat products is assigned to the formation of market prices, taking into account its consumer value.

In the transformation of economic relations between agricultural producers and processing industry enterprises, it is important to develop a system of cooperation that allows creating consumer and processing cooperatives that contribute to increasing the volume of production and processing of meat products in Kazakhstan.

To increase the volume of production and processing of high-quality export-oriented meat products, it is proposed to introduce scientifically based agricultural technologies in the republic.

According to calculations, the total state support for the agricultural sector of the republic will increase by 27.1% by 2025 compared to 2020, which allows, taking into account organizational and economic measures, to increase the production of gross agricultural products by 31.1%, subsidies-by 1.8 times, in animal husbandry – by 1.6 times.

The average live weight of 1 head of cattle sold for slaughter in live weight will increase over the period under review by 16%, the share of meat processing-from 30 to 40%.

Taking into account the current prices and state financial support, the level of profitability of meat products sold will increase by 1.8 times and reach 36.2% for meat of all types, the level of security of the population according to scientifically based standards per capita will be 85%.

The system of state and interstate regulation of the food market should include economic, organizational and administrative measures. As economic measures, it is advisable to stimulate the supply and demand for food products, preferential lending, starting from production to the sale of products on the domestic and foreign markets, the development of interstate leasing of breeding cattle and processing equipment.

It is proposed to conduct commodity and financial interventions, improve the price system for the main types of agricultural products and food, and stimulate exports.

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ҚАЗАҚСТАН МЕН ШЕТЕЛДЕГІ ЕТ ӨНЕРКӘСІБІН БАҒАЛАУ ЖӘНЕ ДАМЫТУ

Аннотация: Қазақстанның ет балансында сиыр еті шешуші орын алады, оны басқа ет түрлерімен алмастыру мүмкін емес, өйткені олардың әрқайсысының өзіндік дәмдік қасиеттері, амин қышқылдарының құрамы және тағамдық құндылығы бар. Алайда нарықтық қайта құру жылдарында мал шаруашылығының ет өнімдерін өндіру көлемінің күрт төмендеуі отандық ет ұсынысының азаюы және оның негізінен алыс шетелдерден мұздатылған түрде импорттық жеткізілімдерінің едәуір өсуі аясында халықтың сиыр еті мен бұзау етін тұтынуының айтарлықтай төмендеуіне әкелді. Еттің жекелеген түрлерін өндірушілер арасындағы бәсекелестіктің артуы нәтижесінде сиыр етін өндірушілер жақсы экономикалық жағдайға тап болмады.

Мал шаруашылығының ет өнімдері нарығының жұмыс істеуі саланы мемлекеттік қолдаудың күрт төмендеуі, мал шаруашылығының ет өнімдері бағасының және оны өндіруге жұмсалатын шығындардың материалдық-заттай элементтерінің сәйкес келмеуі, нарықтың шаруашылық жүргізуші субъектілері арасындағы экономикалық қатынастардың бұзылуы, халықтың төлемге қабілетті сұранысының төмендеуі салдарынан қиындайды. Отандық ет нарығын дамыту проблемасын шешудің өзектілігі Қазақстанның азық-түліктің осы түрі бойынша азық-түлік қауіпсіздігін жоғалтуына байланысты артып келеді.

Зерттеудің мақсаты – Қазақстанда мал шаруашылығының ет өнімдері нарығын дамыту бойынша ұсынымдардың теориялық, әдіснамалық және әдістемелік ережелерін әзірлеу.

Зерттеу нысаны ауылшаруашылық тауар өндірушілері мен ет өңдеу кәсіпорындары.

Ішкі және сыртқы нарықтарда табысты бәсекелес болу үшін АӨК кәсіпорындары бәсекеге қабілетті өнім шығаруды қамтамасыз етуі керек, бұл ет өңдейтін қосалқы кешен кіретін АӨК қайта өңдеу салаларының экономикалық проблемаларының біріне байланысты.

Ғылыми жаңалығы – ет және ет өнімдері нарығының күрделі және қарқынды дамып келе жатқан көпфункционалды өндірістік-экономикалық жүйе ретінде жұмыс істеуінің теориялық негіздері ашылды.

Түйін сөздер: АӨК ет саласы, мал, ет, ет өнімдері, шұжық өнімдері, жартылай фабрикаттар, консервілер.

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ОЦЕНКА И РАЗВИТИЕ МЯСНОЙ ПРОМЫШЛЕННОСТИ В КАЗАХСТАНЕ И ЗАРУБЕЖОМ

Аннотация: в мясном балансе Казахстана определяющее место принадлежит говядине, заменить которую другими видами мяса невозможно, так как каждый из них имеет специфические вкусовые качества, аминокислотный состав и пищевую ценность. Однако резкий спад объемов производства мясной продукции скотоводства в годы рыночных преобразований привел к значительному сокращению потребления населением говядины и телятины на фоне уменьшения предложения отечественного мяса и значительного роста его импортных поставок в замороженном виде преимущественно из стран дальнего зарубежья. В результате возросшей конкуренции между производителями отдельных видов мяса производители говядины оказались не в лучшем экономическом положении.

Функционирование рынка мясной продукции скотоводства осложняется вследствие резкого сокращения государственной поддержки отрасли, несоответствия цен на мясную продукцию скотоводства и материально-вещественные элементы затрат на ее производство, нарушения экономических отношений между хозяйствующими субъектами рынка, падения платежеспособного спроса населения.

Актуальность решения проблемы развития отечественного мясного рынка возрастает в связи с потерей Казахстана продовольственной безопасности по данному виду продовольствия.

Целью исследования явилась разработка теоретических, методологических и методических положений рекомендаций по развитию рынка мясной продукции скотоводства в Казахстане.

Объектом исследования являлись сельскохозяйственные товаропроизводители и мясоперерабатывающие предприятия.

Чтобы успешно конкурировать на внутреннем и внешнем рынках, предприятия сферы АПК должны обеспечить выпуск конкурентоспособной продукции, что связано с одной из экономических проблем перерабатывающих отраслей АПК, к которым относится и мясоперерабатывающий подкомплекс.

Научная новизна заключается в следующем: раскрыты теоретические основы функционирования рынка мяса и мясной продукции как сложной и динамично развивающейся многофункциональной производственно-экономической системы.

Ключевые слова: мясная отрасль АПК, скот, мясо, мясные продукты, колбасные изделия, полуфабрикаты, консервы.

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