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УДК 33

PROBLEMS OF DEVELOPMENT OF THE MEAT INDUSTRY IN KAZAKHSTAN

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Abstract: *Currently, high-quality food, which includes meat products, is important. The production of meat products depends on the state and development of domestic livestock farming and its processing, which is very important in the conditions of competitiveness of the meat industry and conditions of import substitution. Meat products are part of the state strategic reserve, and its development makes a significant contribution to the country's food security. In addition, we have identified acute problems in the livestock industry and meat processing enterprises and proposed possible ways to improve the meat industry in the conditions of import substitution affecting the meat industry in Kazakhstan.*

Key words: *food, animal husbandry, products, meat industry, export, import.*

The relevance of the chosen research topic was determined by the fact that the assessment

state of development of the meat industry in conditions of import substitution in the Republic of Kazakhstan, it is an important issue to provide the population with affordable and quality meat, one of the key aspects of food security countries, will help identify growth points and develop effective support measures domestic producers. It should be noted that the development of the meat industry has a multiplier effect on the country's economy, stimulates the growth of related sectors such as agriculture, feed production, logistics, trade, creates new jobs and thereby increases tax revenues to the budget.

The development of the domestic meat industry will accelerate the introduction of resource-saving technologies and waste management systems, which will minimize negative impact on the environment, innovative technologies, increased product quality and reduction of production costs, competitiveness meat products, reduce dependence on external markets and increase sustainability economy to external shocks. An assessment of the state of the meat industry will allow also create an information basis for making informed decisions on industry development. Thus, an article on the topic - "assessing the state of development of the meat industry in conditions of import substitution in the Republic of Kazakhstan" is relevant and important, of great importance for food security, economic development, increasing the country's competitiveness and improving the well-being of the population. The meat industry has characteristics that are agricultural production.

This leads to product prices formed by agriculture and industry. Retail buyers usually choose domestic products, while wholesalers prefer imported supplies. Today, companies must respond quickly to new market arrivals and changes in their divisions, adhering to a unified company strategy [1].

For humans, meat and meat products are natural sources of proteins, fats, phosphates, a complex of mineral substances, aromatic and extractive substances, as well as some vitamins, mainly groups B, D and A [2, p. 256]. These products are necessary for survival in the harsh conditions of the continental climate, which is typical for most of the country.

For the effective development of the meat industry, it is necessary to create a comprehensive system where production and the economy will work together to ensure efficient state support for meat processing companies. Enterprises, at the same time, Kazakhstan has all the potential in the development of the meat industry to become a leader, subject to government support to reduce import dependence of meat products. Currently, the Government of the Republic is already taking: steps have been developed regulatory documents aimed at developing the meat industry [3-7].

Creating a favorable climate for the development of the meat industry in the territory Kazakhstan and protecting the regional market from competition and the influence of foreign companies – meat processing plants, suppliers, etc. is a key task to achieve economic growth in the regional aspect and import substitution domestically produced meat products. This is necessary, since the share of imports meat and meat products in the total volume of domestic resources is about 25%, which threatens the food security of Kazakhstan [8].

For a more objective analysis of the meat industry, we examined production volumes of meat processing enterprises in physical terms, tons are shown in table 1.

Table 1

Volume of production of meat processing enterprises in the meat industry in physical terms, tons

№ п/п	Name	years					Absolute deviation	
		2018	2019	2020	2021	2022	+, -	%
1	Meat and food by-products	263 529	303 767	295 421	339 009	349 727	86 198	32,70
2	Meat of cattle, pigs, sheep, goats, horses, and equines, fresh or chilled	66 378	66 375	59 419	65 673	72 913	6 535	9,84
3	Fats from cattle, sheep, goats, pigs	374	139	114	48	43	-331	-88,50
4	Canned meat	6 876	7 357	8 532	5 994	6 298	-578	-8,41
5	Prepared and canned products from meat, meat by-products or animal blood	79 812	94 032	103 464	105 905	113 261	33 449	41,90
6	Sausages, similar products made from meat, meat by-products or animal blood	45 009	55 983	62 335	63 299	65 787	20 778	46,16
7	Production index of sausages and similar products made from meat, meat by-products or animal blood, excluding units. change	1,03	1,243	1,113	1,015	1,039	0,009	0,873
8	Total all meat products of meat processing enterprises	461 978	527 653	529 285	579 928	608 029	146 051	34
9	Number of enterprises, units	156	160	165	168	172	16	10,25
10	Average annual output of meat products per meat processing plant	2 961,397	3 297,831	3 207,788	3 451,952	3 535,052	573,65	19,37
11	Average monthly production capacity of meat products of one meat processing plant	248	275	267	286	295	+47	+19

Table 1 shows that the total volume of production of meat products over a five-year period by all meat processing enterprises in the meat industry increased by 34% and amounted to 608,029 tons in 2022, including increased production volumes:

- sausages by 46.16%, in 2022 - 65,787 tons;
- finished products and canned meat by 41.9%, actually amounting to 113,261 tons;
- meat and food by-products by 32.7% or - 349,727 tons;
- meat of cattle, pigs, small animals, small animals, fresh or chilled by 9.84%. The greatest growth was shown by the production of horse meat – by 7.3%.

The decrease occurred for 2018/2022 in the following categories of meat products: animal fats by 88.5% or in 2022 amounted to 43 tons; canned meat by 8.41%, which is equal to 6,298 tons in 2022.

The average annual output of meat products from one meat processing enterprise in 2018 was 2961.397 tons per year, and in 2022 - 3535.052 tons per year, i.e. the increase is 19.37%, while the average monthly production capacity of meat products in 2022 is equal to 295 tons per meat processing plant, an increase of 19%.

The meat industry of Kazakhstan is a dynamically developing industry. There are large meat processing enterprises in the country, which

They produce a wide range of products and provide the domestic market of the country. The main largest meat processing enterprises in Kazakhstan are shown in Table 2.

Table 2

The largest Top 7 meat processing enterprises of the Republic of Kazakhstan

№	Name	Capacity, tons per year	Location, region	Products
1	"Rubicom" LLP	12 000	Pavlodar	Sausages, delicacies.
2	"Kubley" LLP	7 700	West Kazakhstan	Meat, canned meat.
3	Aktep LLP	7 200	Aktobe	Sausages, delicacies.
4	"Kayib Ata" LLP	6 500	Turkestan	Raises cattle and small cattle.
5	LLP "MPK "Bijan"	5 500	Almaty	Sausages, delicacies.
6	TOO "Kaz Beef"	5 000	Akmola	Feed, raising cattle, small cattle, meat
7	"Astana Agroproduct" LLP	5 000	Akmola	Processing of meat - goulash, beef stroganoff, entrecote, stew

Note – compiled by the author based on the source [10].

According to table 2, in the Republic in 2022 there are 7 largest meat processing enterprises operating. They are located in different regions of the country and have different specializations.

All of the listed meat processing enterprises are important players in the meat products market in the Republic of Kazakhstan. They provide the country's domestic market with meat products, and also export their products to other countries.

To identify the impact of import substitution from external supplies of meat products to ensure food security and analyze exports and imports, the article examined the amount and structure of foreign trade turnover (Table 3).

Table 3

Foreign trade turnover of meat products and its structure in the Republic of Kazakhstan for the period 2018–2022

№	Name	years					Absolute deviation	
		2018	2019	2020	2021	2022	+, -	%
Foreign trade turnover of meat products, thousand dollars								
1	Import of meat products, thousand dollars	132 185,8	196 254,8	204 967,3	238 595,4	237 734,9	105549,1	79,85
2	Export of meat products, thousand dollars	35 397,8	40 608,2	44 308,5	42 750,0	128 369,2	92971,41	262,65
3	Foreign trade turnover of meat products, thousand dollars.	167 583,6	236 863,0	249 275,8	281 345,4	366 104,1	198 520,5	118,46
Structure of foreign trade turnover of meat products (% of thousand dollars)								
4	Import of meat products, %	78,87	82,85	82,22	84,80	64,94	-13,94	-17,7
5	Export of meat products, %	21,12	17,14	17,77	15,19	35,06	13,94	66,00
6	Total foreign trade turnover of meat products, %	100	100	100	100	100	0,00	0
Foreign trade turnover, tons								
7	Import of meat products, tons	56596,8	77394,33	84929,79	94603,45	83229,19	26632,38	47,05
8	Export of meat products, tons	10 017,70	10657,90	13 114,70	10 251,10	29 692,70	19 675,00	196,4
9	Foreign trade turnover of meat products, tons	66 614,50	88052,23	98 044,49	104 854,55	112 921,89	46 307,39	69,51
Structure of foreign trade turnover of meat products (% of tons)								
10	Import of meat products, %	84,96	87,89	86,62	90,22	73,70	-11,26	-13,25
11	Export of meat products, %	15,03	12,10	13,37	9,77	26,29	11,26	74,85
12	Total foreign trade turnover of meat products, %	100	100	100	100	100	0,00	0
Note – compiled by the author based on the source [11].								

Table 3 shows that the foreign trade turnover of meat products in the Republic over a 5-year period increased by 118.46%. At the same time, exports increased 2.62 times and amounted to 128,369.20 thousand dollars, and imports increased by

79.85%, which is equal to 237,734.90 thousand dollars in 2022. In the structure of foreign trade turnover of products from meat (as a percentage of thousand dollars), imports decreased by 17.7% and amounted to 64.94% in 2022, and exports - 35.06%, this shows that imports exceed exports by almost 30%.

When studying the foreign trade turnover of meat products based on tons, the export-import ratio is 73.7% / 26.29%, i.e. also indicates the predominance of imports over exports by 47.41%, which is one of the indicators characterizing high import substitution. When comparing the foreign trade turnover of meat products in tons, the ratio of exports and imports is 73.7% to 26.29%. This also indicates the predominance of imports over exports by 47.41%.

It can be noted that in general the meat industry is developing, especially in the primary processing of meat, there is a shortage of meat products for secondary processing - sausages, canned food, and this affects the increased volume of import substitution of these products mainly from Russia and Belarus, which is a threat to food security as indicated range of products. Recycling of meat products is not developed in meat processing enterprises in Kazakhstan, it is associated with uneven production load of raw materials and, as a result, arrhythmic production and a decrease in profitability, and there are no investment opportunities, non-innovative technologies, highly qualified personnel, since second-tier banks are not interested in issuing loans for unsustainable enterprises.

All these factors influence exports, imports and foreign trade turnover, which exceeds imports of foreign sausages and canned goods. Based on the developed EMM, it can be seen that only through joint efforts through the introduction of a meat cluster with the combination of state support, livestock farming and meat processing enterprises and others can the desired synergistic effect be achieved.

For the further development of the meat industry in Kazakhstan, a full-fledged systematic assessment of these phenomena is needed and it can be noted that the meat industry is developing positively, but not particularly intensively, this affects the export, import and import substitution of meat products, we can draw the following conclusions:

In general, the export of meat products in Kazakhstan has a positive trend; there is a decrease in the export of some types of meat products. The growth in product exports to the Republic of Kazakhstan in 2022 compared to 2018 is due to several factors, including:

- an increase in production in the Republic of Kazakhstan as a result of state support for agriculture;
- growing demand for products from Central Asia, Uzbekistan, the Middle East and China;
- improving the quality and range of Kazakhstani meat products;
- it is necessary to continue work to improve product safety, develop export infrastructure and diversify exports.

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МЕХАНИЗМЫ ПОВЫШЕНИЯ ЭФФЕКТИВНОСТИ ХОЗЯЙСТВЕННОЙ ДЕЯТЕЛЬНОСТИ СЕЛЬСКОХОЗЯЙСТВЕННЫХ ТОВАРОПРОИЗВОДИТЕЛЕЙ

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Аннотация: *Статья посвящена рассмотрению механизмов интенсивного развития отрасли сельского хозяйства, которые применяются на уровне государства, региона и хозяйствующего субъекта. Предложен комплекс механизмов, направленный на выбор оптимальных путей модернизации хозяйственной деятельности сельхозпредприятий.*

Ключевые слова: *сельское хозяйство, механизмы, эффективность, модернизация, инновационная деятельность.*

Сельское хозяйство постоянно развивается вследствие неизбежного и непрекращающегося развития науки и техники. С каждым годом появляется все больше возможностей и средств, применяя которые сельскохозяйственные товаропроизводители могут повысить эффективность своей хозяйственной деятельности. Современное оборудование и технологии могут предложить целый ряд преимуществ для предприятий. Так, например, применение цифровых и ресурсосберегающих технологий в области растениеводства позволяет использовать природные, трудовые, материально-технические и финансовые ресурсы более рациональным образом [7].

Инновационная деятельность в сельском хозяйстве представляет интерес не только для непосредственно производителей, но и государства. Без этого невозможно динамичное развитие отрасли, которое оказывает влияние, во-первых, на повышение уровня продовольственной безопасности, а во-вторых, на устойчивость социально-экономического развития. Поэтому политика государства в данной области направлена на стимулирование и поддержку сельхозпроизводителей в модернизации производственных мощностей. Эта позиция нашла отражение в различных документах стратегического планирования.