

DAIRY-PRODUCT COMPLEX: FEATURES OF FUNCTIONING

СҮТ-АЗЫҚ-ТҮЛІК КЕШЕНІ: ЖҰМЫС ІСТЕУ ЕРЕКШЕЛІКТЕРІ

МОЛОЧНО-ПРОДУКТОВЫЙ КОМПЛЕКС: ОСОБЕННОСТИ ФУНКЦИОНИРОВАНИЯ

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Abstract. *The goal is to monitor functioning of dairy product complex, including production, management, marketing and economic aspects, on the basis of which the current state and prospects for its development are considered, problems and possible solutions are identified, optimal options for intensifying production processes are shown to increase their efficiency and improving the quality of dairy products. Methods – statistical collection and analysis of data on volumes, productivity levels, consumer demand, prices for dairy products; economic analysis made it possible to study production component, including the study of costs, profits, structure of expenses and income, factors influencing on profitability and competitiveness of dairy enterprises. By familiarizing with technological schemes of the dairy industry, quality level, living conditions of animals, methods of storage and transportation of milk and dairy products were analyzed, and promising directions of production cycle were assessed. Results - recommendations for the effective use of technologies to increase labor productivity and product competitiveness have been prepared. A study of dairy sector of agriculture, which makes a significant contribution to the country's economy, made it possible to identify problematic segments: high costs, instability of prices for raw materials and products, as well as insufficient demand in foreign trade. It is recommended to develop a strategy for promoting domestic products and meeting the needs of domestic and foreign markets. Conclusions - regular updating of equipment, constant training of personnel and adaptation to changing market requirements are the key to success in increasing the volume of the dairy industry.*

ing production, updating products, incorporating innovative technologies, enhancing services, and focusing on product quality. The company is also engaging in efforts such as exploring optimal sales methods, implementing after-sales service, and warranty services.

The stage of maturity of a dairy production enterprise is accompanied by its financial stability, improvement of financial results, expansion of the range and volumes of dairy products, and an increase in consumer demand. At the maturity stage, both external and internal factors can influence the competitiveness of an enterprise. With pessimistic factors, there may also be a decline in the enterprise at the maturity stage due to a decrease in the competitiveness of dairy products. In this case, the company must withdraw from the dairy market or diversify the production process.

Thus, the life cycle of a dairy production enterprise is a more increase in competitiveness of products, in which the competitive advantages of dairy products are strengthened and expanded. Dairy production enterprises operate in a perfect competitive environment, and therefore each enterprise has its own strategic program, depending on what stage of the life cycle the enterprise is at.

The life cycle of production of any type of dairy products is closely related to the desires of customers and their interest in buying a particular type of product. The functioning of dairy production enterprises is focused on customers, on the degree of their satisfaction with the products of a particular enterprise relative to other industry markets.

Stages of the life cycle of dairy production, various measures are implemented to increase its competitiveness in the industry market (Zinchenko A.P., Ukolova A.V., Demichev V.V.) [1]:

- statistical and economic analysis of the activities of an enterprise for the production of milk and dairy products is necessary to identify the financial stability of the activity and further determine the industry market for the sale of a commercial product;

- research on the marketing of the industry market, to determine the perception of consumers of certain types of milk and dairy products, establishing communication with retail and wholesale trade networks is very important at the stage of entering the industry market of new types of dairy products;

- in the case of entering new markets for dairy products, it is necessary to diversify production to expand the range of dairy products, new sales channels will be needed, which will

affect the competitiveness of the enterprise for the production of dairy products;

- the stages of maturity of milk and dairy products are the most "dangerous" stages in conditions of perfect competition in this environment. To stay in the dairy market, it is necessary to take into account and improve the better quality characteristics of milk and dairy products by increasing the safety of raw materials or by improving packaging;

- avoids the loss of competitiveness of the enterprise and dairy products due to changes in the enterprise, changes in production processes, reminiscent of advertising, the formation of a new image of the enterprise.

Literature Review

The competitiveness of dairy production enterprises depends on a number of factors, which should be defined into four main groups.

In his research, Gorfinkel V. Ya. [2] classifies the above factors into price and non-price ones. Further, Fatkhuddinov R.A. [3] considered the management of the competitiveness of the organization, Azoev G.L. and Chelenkov A.P. [4] also considered the competitive advantages of the company. Price factors occur with an increase in labor productivity and a decrease in production costs (enterprise costs or production costs). To increase labor productivity, it is necessary to use innovative technologies for the production of dairy products, new equipment and production lines. The implementation of these measures, first of all, will reduce the cost of production, therefore the products will be competitive in price parameters.

Non-price factors of product competitiveness are manifested in the quality of marketable products, the image of the enterprise, the brand and brand of dairy products, the system of sales channels and trade of goods, advertising, after-sales service.

When conducting factor analysis and index indicators, to check the quality and reliability of the index, it is necessary to divide it into two levels. The first stage includes the qualitative safety properties of dairy products. These signs are important for customers, because in the structure of purchases, milk and dairy products occupy a large share in the structure of public spending on food. All the competitiveness coefficients of a dairy enterprise have certain specifics.

The dairy market in modern times is very saturated with various goods that are close in quality and price range. In this regard, each enterprise must conduct effective advertising activities in order to gain a foothold in the in-

dustry market. It is necessary to form public opinion on the quality of the brand of dairy products, since attracting a buyer in the dairy market is a very difficult activity. With each period of time, new analog products appear on the markets, with new attractive packages and updated quality properties.

The analysis of statistical data indicates that the dairy cattle industry with the entire system of processing and marketing of products was characterized by a high level of efficiency. According to researchers, the main reasons that have led to devastating consequences in cattle breeding and continue to have a negative impact are: unstable level of purchase prices for milk; an imperfect mechanism of state regulation of imports of products, imported at significantly lower prices, puts the producer in unequal conditions and threatens further curtailment of production; lack of a credit policy beneficial to the producer aimed at updating fixed assets; weak integration of production, processing and sale of dairy products, which leads to sharp fluctuations in purchase prices milk prices; low solvency of the population; a significant decrease in the number of large specialized enterprises with high.

Materials and methods

Improving the welfare of the population, the emergence of new types of dairy products give rise to new types of competitiveness. The growth of purchasing power is changing the structure of consumption of dairy products by the population. Buyers want to purchase new types of dairy products with various flavorings, new types of bacteria, with improved taste properties. People are more active in leading a healthy lifestyle. Therefore, dairy production enterprises compete in the production of healthy products.

A change in one factor of the competitiveness of dairy products causes a change in a number of other factors, which ultimately affects the competitiveness of dairy enterprises themselves. The Technical Regulations of the Customs Union are the normative legal documents for the production of dairy products. Dairy products should be safe for human life and health, it is necessary to identify possible dangerous factors of chemical, physical and biological origin at all stages of the production cycle.

Dairy products have a limited shelf life, must have modes and conditions of storage, transportation and sale of finished products. In addition, dairy products must comply with the

requirements established by law (appearance, consistency, taste, smell and color). The need to meet technical requirements for the quality of dairy products increases production costs for the cost of dairy products and the final price (Kodolova T.A., Suvorova L.A.) [5]. The calculation of the price of dairy products has its own characteristics, since raw materials are often purchased from private farms, it is necessary to take into account the returnable waste of raw materials, services of third parties, logistics costs, fuel and electricity costs, packaging and packaging occupy a large share of the costs, risk insurance, various commercial expenses, etc.

Results

The strengthening of the competitive environment in the dairy market forces manufacturers to pay special attention to the quality of packaging of a marketable product. Today, in the dairy market, all types of packaging materials can be found on the shops of retailers: glass, polymer materials, foil, cardboard, plastic, metal, etc. (Suvorova L. A. Kodolova T. A.) [6]. Dairy products are divided by viscosity and chemical properties:

- * liquid products, which include milk, cream, kefir, fermented baked milk, liquid yoghurts, drinks, etc.;

- * viscous, which include cottage cheese, sour cream, condensed foods, viscous fermented dairy products, cheesecakes, processed cheeses, etc.;

- * bulk - milk powder;

- * hard – cheeses, hard fermented milk products, etc.

The types of packaging materials for dairy products have their advantages and disadvantages (table 1).

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The diversification of one factor of the competitiveness of milk and dairy products Leads to a change in a number of other factors, which ultimately affects the competitiveness of dairy enterprises.

Table 1 - Advantages and disadvantages of the type of packaging of dairy products

Type of packaging	Products	Advantages	Disadvantages
Polymer packaging	Milk, cream, fermented dairy products, yoghurts, sour cream, cottage cheese and cottage cheese products, butter	The presence of a convenient traffic jam	The packaging lets in light, and this spoils the taste and composition of the products, it is undesirable to add chemicals
Plastic packaging	Milk, cream, fermented milk products, beverages, yoghurts, sour cream, condensed milk	The packaging is almost weightless. Low cost of packaging, and therefore of products. Preserves the quality and taste of products	Low packing strength, may tear. It doesn't keep its shape. Reduces the shelf life of products
Cardboard packaging	Milk, cream, fermented milk products, drinks, yoghurts, sour cream	Light weight, compactness, durability. Environmental friendliness.	-
Tin packaging	Condensed milk	The possibility of recycling. Low cost. Protection from light. Tightness. Extended shelf life	The probability of metal ions entering the product
Laminated foil	Butter, margarine, cottage cheese	High strength, impact resistance. Long shelf life of products. Protection of the contents from exposure to light, gases, air, water and other environmental factors	High cost
Parchment paper	Butter, margarine, cottage cheese	Impenetrability, opacity. The ability to acquire and maintain a given shape. Provides a long shelf life	Transparency. Does not hold its shape, is not convenient for transportation
Note: compiled by the author			

The industrial regulations of the Customs Union are executed as regulatory legal documents in the production of dairy products (Dairy drinks market analysis ...) [8]. Dairy products must be safe for human life and health, it is necessary to identify possible hazards of chemical, physical and biological origin at all stages of the production cycle. Dairy products have a limited shelf life, must have modes and conditions of storage, transportation and sale of finished products. In addition, dairy products must comply with the requirements established by law (appearance, consistency, taste, smell and color).

Global dairy production. Dairy products are produced most of all in the countries of the European Union, the USA and India. In 2021, these countries together produced 52.3% of the world's dairy products. The world leaders in milk production are the EU countries, India and the USA, whose share in total in 2020 amounted to 52.3%. The dairy products output in the context of the main market leaders in the industry markets.

Germany, the USA, France, Italy and the Netherlands all export 54.6% of the global whey market. The leading position in the global butter market is occupied by New Zealand, the Netherlands, Ireland, Belgium and Germany -67.6% of all world exports. Most of

the cheeses are produced and exported by the EU and the USA. The main participants in the global buttermilk, yogurt and kefir markets are Saudi Arabia, Germany, France, Belgium and Austria, which account for 56% of all global exports.

It should be noted that many countries, for example, Germany is both the leader in exports and imports of dairy products of world production.

Kazakhstan must strictly comply with all the requirements of the Customs Union in compliance with the technical regulations for the production of dairy products. The Customs Union includes Russia, Belarus, Armenia, Kazakhstan and Kyrgyzstan.

In the EAEU countries, most milk and dairy products are produced in Belarus. The country has highly competitive enterprises equipped with the latest technological lines, producing competitive dairy products that are exported to world markets. Dairy products of this country are in great dispute in many countries and in almost all CIS countries. Dairy exports account for 60% of all dairy products produced. The country's 45 largest enterprises produce 1 500 types of dairy products.

In Armenia, the production of the entire volume of milk is concentrated in private

farms. In Kyrgyzstan, private farms produce about 50% of milk.

On average, 2 000 tons of milk are processed in Kazakhstan per year. The work is mainly carried out during warm periods of time, when there is a sufficient yield of whole milk-raw materials. In winter, due to the lack of raw materials, which are purchased from private farms, the capacities of dairies are operated by 20%. According to the Ministry of Agriculture of the Republic of Kazakhstan, there are about 165 dairy production enterprises in the country today. And only 35 of them have their own dairy farms for the production of raw materials - whole milk. Almost 80% of all Kazakhstani dairy production enterprises are dependent on third-party suppliers of raw materials.

As of 2020, only one third of the raw materials in Kazakhstan were produced on their own dairy farms by dairy producers. More than 600 thousand tons of milk were purchased from households (Price monitoring of agricultural products...) [10].

Raw milk is mainly produced on farms and farms in East Kazakhstan (16%), Turkestan (13%), Almaty (13%) and North Kazakhstan (10%) regions.

In 2022, about 170 dairy production enterprises were registered in Kazakhstan with a production volume of about 1 900 tons of marketable products per year. Cheeses are produced at 34 enterprises in the country. According to the Ministry of Agriculture, 41 enterprises in the country require modernization or reconstruction of milk processing facilities. As of 2022, dairy production enterprises in the country produced 1055 tons of pasteurized milk and cream, 34.6 thousand tons of butter and 9 300 tons of cheeses. One of the largest dairy production enterprises in Kazakhstan is JSC Food Master Company, which has been integrated into the international Lactalis Group (France) since 2004. The company's subsidiaries operate in three cities of Kazakhstan: Food Master-Issyk, Food Master-Shymkent and Food Master-Pavlodar. They have their own dairy farms and 16 retail chains and branches.

In 2009, the Food Master-Pavlodar enterprise diversified production with the installation of new production lines and modernization of the main workshop premises. Currently, the Food Master-Pavlodar enterprise is one of the most advanced in the dairy market with innovative dairy production processes. Since 2022, the Food Master-Issyk enterprise has been operating according to the international

system of risk analysis and critical points, which allows it to maintain its competitiveness at a high level.

Thus, in 2022, 6 large dairy farms with a total population of 3 810 heads of dairy cattle began operating in the Republic of Kazakhstan. Among them, 5 facilities are located in the Almaty region: the dairy farm of Aksut LLC LLP and the April company, the social and entrepreneurial corporation Plemzavod Almaty, the peasant farms Karabasova and Sadyhan. The diversification of the Turkestan dairy farm of Kazyna Zher LLP for 1 600 heads in the Turkestan region was also carried out. In 2023, it is planned to organize 16 dairy farms in Kazakhstan (Review of public policy in the field...) [11].

Kazakhstan's largest dairy production enterprises are increasing their export potential from year to year, which once again underlines their competitiveness in the industry market. In 2022, 6 dairy production enterprises received the official right to export their commercial products to China. These are the following enterprises - Gormolzavod LLP in Kokshetau, Akmola region, Daulet-Beket in Taldykorgan, Almaty region, Leader-2020 in Rudny, Kostanay region, Almaty Food Master, Eurasia Invest LTD" Karaganda region, Golden Camel Group LTD Turkestan region (Milk production is growing in Kazakhstan...) [12].

On average, enterprises in Kazakhstan supply 5,000 thousand tons of dairy raw materials to the dairy market per year, of which only 1000 tons are commercial milk, suitable as raw materials for further processing. Of these, about 75-78% are supplied by small farms, while large specialized commodity farms account for no more than 22% (Milk production is growing in Kazakhstan...) [13].

According to the data of the Dairy Union of Kazakhstan, indicators of consumption and resources of dairy products in the country for a number of years are presented. According to the indicators it is possible to judge the growth of raw materials-resources for milk processing by 7.5% in the period from 2017 to 2021. There is also an increase in dairy production by 5.3%. The consumption of dairy products by the population of Kazakhstan has also increased by 6.3% over 5 years.

The analysis shows that in January 2023, compared to the same previous period, exports of dairy products practically did not change, slightly increased by 0.4% (in January 2022 – 5 098 tons, in January 2023 1 year -5 079 tons) (table 2).

Table 2 - Indicators of production, import, export and sale of raw materials and processed dairy products in Kazakhstan

Indicator	Type (group) of dairy products, ton						
	milk and condensed cream	milk, condensed cream and powdered milk	buttermilk, yogurt, kefir	milk whey	butter	cheeses and cottage cheese	milk and condensed cream
Production of raw materials	82 227	49 758	2 611	1 859	4 172	1 745	20 082
Production of dairy products	70 717	48 159	97	1 405	2 358	591	17 145
Import of dairy products	11 511	1 599	2 513	454	1 814	1 154	2 937
Export of dairy products	5 079	3 648	56	59	214	2	933
Sales of dairy products in the Kazakhstan industry market	77 149	46 110	2 555	1 800	3 958	1 743	19 149
Note: compiled by the author							

The dairy market is significantly influenced by world prices for imported raw materials. The following prices were fixed at the auctions of the EAEU countries on April 7, 2023 (The official website of the Dairy...) [14]:

- the minimum price for unsalted cow's sweet butter, with a fat content of 82.5%, was set at 4.5 US dollars per kilogram, while the maximum price was set at 4.9 US dollars per kilogram. But in terms of tenge, it increased by about 5 compared to 2022 %;

- minor changes in the price of skimmed milk powder with a fat content of 1.5% - the minimum price increased by 2.7% relative to 2022 and settled at 2.7 US dollars per kilogram, while the maximum remained unchanged at 2.8 US dollars per kilogram.

An indicator on the ability of enterprises to compete in terms of the availability of raw materials. In Kazakhstan, raw materials are supplied mainly from small farms engaged in the breeding of dairy cattle.

To compare the availability of raw materials, an analysis of individual dairy processing enterprises in Kazakhstan was carried out.

However, there is a wide range of products for each basic name. Based on the research results, proposals have been developed to improve the competitiveness of dairy production enterprises in Kazakhstan (figure 1).

The proposals are classified into 4 areas:

- conducting economic research;
- improvement of production and management processes;
- product quality improvement;
- compliance with the new technical regulations of the Customs Union.

Discussion

In our opinion development of the dairy industry:

- * increasing the competitiveness of the dairy product itself through the ratio of quality and price. The quality of dairy products depends on the quality of raw materials – milk, which must have an affordable price and high quality revenue. The quality of raw milk, in turn, depends on the condition of the animals and their diet, their conditions of maintenance, and the ecological environment;

- * to protect dairy products, it is necessary to ensure compliance with the standards and technical regulations provided for in the regulations of the Customs Union, which enter into force on January 1, 2022. The logistics supply chain of raw materials for the transportation of milk and dairy products to the end consumer and their storage must be completely safe in order to increase the competitiveness of products (Lifshic I. M.; Kotler, F.) [15,16];

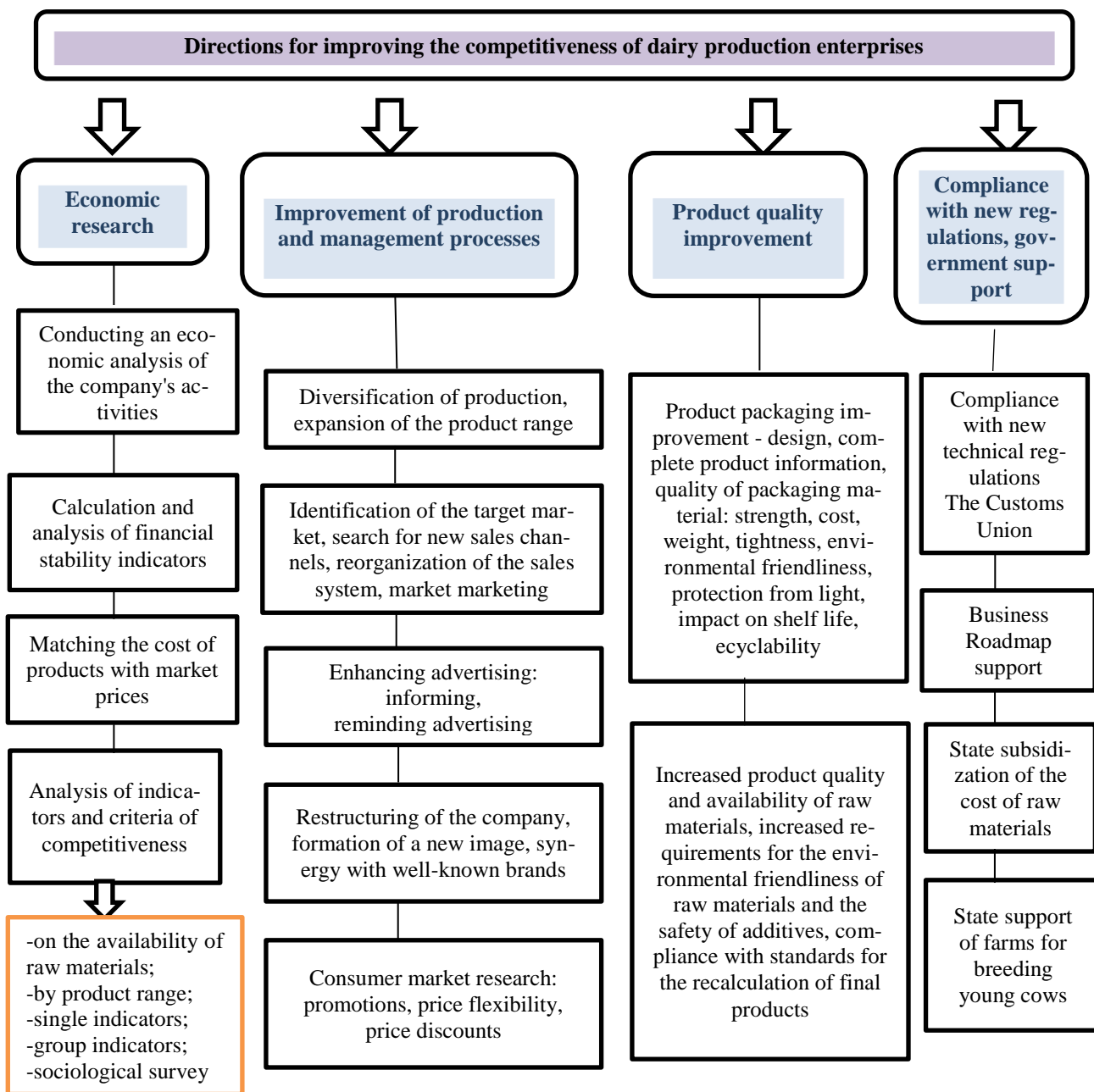
- * support for small and medium-sized enterprises - dairy producers in Kazakhstan is implemented through the “Business Roadmap”;

- * the tasks of managing the competitiveness of enterprises producing dairy products include expanding industry markets; improving the level of technological processes, improving the quality of dairy products; reducing the level of defective commodity products; developing after-sales services;

- * support for small and medium-sized enterprises - dairy producers in Kazakhstan is implemented through the “Business Roadmap”;

* the tasks of managing the competitiveness of enterprises producing dairy products include expanding industry markets; improving the level of technological processes, improving the quality of dairy products;

reducing the level of defective commodity products; developing after-sales services. The competitiveness of any enterprise is based on the competitive advantages of manufactured and marketed products.



Note: compiled by the author

Figure 1. Proposals for improving the competitiveness of dairy production enterprises

Conclusions.

At each stage of the life cycle of dairy production, various measures are implemented to increase its competitiveness in the industry market:

- statistical and economic analysis of the activities of the enterprise for the production of milk and dairy products;

- marketing research and market research of industry products;

- identification of consumers' perception of specific types of dairy products, performance of advertising work, formation and installation of communication with retail and wholesale structures;

- if it is necessary to diversify production in order to enter perfect markets for milk and

dairy products, new sales channels will be needed in order to expand the selection of dairy products;

- in order to stay in the dairy market, it is necessary to improve the quality parameters of dairy products;

- beware of damage to the competition of the enterprise, and the manufactured dairy products are just right due to the restructuring of the enterprise, the diversification of industrial technological processes, the formation of a new image of the enterprise.

Based on the research results, we have developed proposals to improve the competitiveness of dairy production enterprises in Kazakhstan. These proposals are grouped into four directions: conducting economic research; improvement of production and management processes; product quality improvement; compliance with the new technical regulations of the Customs Union and the use of state support tools for dairy production enterprises.

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