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ANALYSIS OF THE DOMESTIC POULTRY COMPETITIVENESS

The purpose of the research is to develop directions for increasing the competitiveness level of the poultry meat, its cooperation with other industries to ensure the Kazakhstan food security.

Research results are the development tendencies of the domestic poultry meat market are analyzed in the article; the commodity-geographical structure features of the poultry meat market were evaluated, the new directions for increasing the competitiveness of the domestic poultry meat market are researched.

The volume and structure of poultry meat production in the domestic poultry meat market was estimated, the factors inhibiting the development of domestic poultry meat production were identified, conceptual directions were developed and their implementation to ensure the competitiveness of the domestic poultry meat.

The conclusion of the research is that the domestic poultry meat market analysis, assessment of innovative potential and competitiveness allowed to formulate the main competitiveness increasing directions of the domestic poultry meat market.

Keywords: agriculture, poultry meat, domestic market, competitiveness, government support.

Introduction

In recent years, one of the most pressing issues in Kazakhstan's economic situation has been ensuring the country's food security. Addressing this issue is closely tied to improving the efficiency and competitiveness of the domestic agro-industrial complex (AIC). Poultry products play a particularly important role within the agro-industrial complex. In his address titled «Unity of the People and Systemic Reforms are a Strong Foundation for the Nation's Prosperity,» President Kassym-Jomart Tokayev stated that «the main task of the agricultural sector is to fully ensure the country with basic food products, support the technological modernization of agriculture, and align agricultural subsidy policies with industrial state policy» [1].

Poultry meat is a leading product among meat categories and holds social significance for the proper nutrition of a quarter of Kazakhstan's population. A civilized meat market is just beginning to take shape in Kazakhstan. However, there are factors affecting the competitiveness of domestic poultry meat. Poultry farming enterprises can achieve production indicators such as daily weight gain of birds, incubation of poultry, and feed production, but labor productivity in the sector remains several times lower compared to American, European, or Brazilian poultry farming. In this regard, it is necessary to scientifically justify the future development prospects of the poultry meat market, enhance its competitiveness, improve state influence methods, and create a developed market infrastructure. This infrastructure should aim to expedite a fast, efficient, and import-independent production process for processing, selling, and satisfying consumer needs with poultry meat and its products.

In addition to the growing demand for poultry products, it is important to note that these products can also be a source of various risks, including physical, chemical, and especially microbiological hazards [2]. The program for the development of poultry farming in Kazakhstan for 2018–2027 aims to improve the quality and range of products, including increasing chilled meat production and deep processing [3]. Therefore, ensuring the competitiveness of domestic poultry meat remains a relevant issue.

Both domestic and foreign scientists are showing interest in the further development of the poultry meat market. For example, researchers from the University of Bristol–Fusconi, Hadley, and Knowles–have noted the growing importance of halal meat for the development of markets in Muslim countries, with some enterprises turning to halal certification bodies to convince consumers [4].

In the current competitive environment, poultry products are highly developed in both the global and Kazakhstan markets, but the volume of poultry products produced does not fully meet the population's demand. This highlights the need for

poultry farming enterprises to increase their production capacity and take measures to enhance their market competitiveness [5]. It has been emphasized that, in order to meet domestic needs and reduce dependence on imports, the development of poultry farming is necessary [6].

The issue of further developing the poultry meat market can only be successfully resolved if domestic poultry organizations achieve stable competitiveness. The available production capacity should not only meet domestic demand but also be sufficient to enter foreign markets. One solution to this issue is increasing the export of poultry products, which will enhance their competitiveness in the global market.

Materials and methods

To analyze the poultry meat market, abstract-logical, comparative analysis, and economic-statistical methods were used. The research period covers 2017–2022. Data from the Food and Agriculture Organization of the United Nations (FAO), the Organisation for Economic Co-operation and Development (OECD), the Eurasian Economic Union (EAEU), Kazakhstan's National Bureau of Statistics, and World of NAN were utilized. Scientific domestic and foreign literature was also employed within the scope of the research topic.

An analysis was conducted on domestic poultry meat production, external and mutual trade indicators. During the analysis, several issues were identified, and recommendations were formulated to enhance the competitiveness of domestic poultry meat and to develop the sector's export potential.

The analysis materials can be used in the development of recommendations for the growth of the poultry farming sector.

Results and discussion

The rapid growth of poultry meat production worldwide is determined by several factors. The main ones include: centralized intensive industrial production and vertical integration, profitability, access to feed, a high level of mechanization, production of consumer-friendly products, rapid development of public catering networks, widespread use of freezing methods, modern equipment and specialized transportation, the growth of international trade, and most importantly, the ever-increasing consumer demand.

Based on the annual review of the Eurasian Economic Union [7], and data from the Food and Agriculture Organization of the United Nations (FAO) and the Organisation for Economic Co-operation and Development (OECD) [8], we conduct a comparative analysis of the market factors affecting the development of the domestic poultry meat market with the member countries of the EAEU. Among the EAEU countries, only Kazakhstan showed good growth in poultry numbers compared to 2017, with a 24.2 % increase. As of January 1, 2023, the

number of poultry was 45,653,100, and as of June 1, 2024, it increased by 0.5% compared to the previous year, reaching 47,263,274 birds (Table 1).

Table 1 – Number of birds, million

	2017	2018	2019	2020	2021	2022	2022/2017,%
Kazakhstan	39,9	44,3	45	43,3	47,9	49,8	124,2
Armenia	4,4	4,2	4,4	4,2	4,8	4,9	111,2
Belarus	50,7	51,1	53	47,5	48,1	54,4	107,3
Kyrgyzstan	59,9	6	6,2	6,1	5,9	6,4	107,8
Russia	555,8	541,5	544,7	518,7	536,9	550,8	99,1

Note: compiled by the authors from the EAEU, FAO, OECD sources [7,8]

According to the National Bureau of Statistics of Kazakhstan, as of January 1, 2024, 16.7 % of poultry were accounted for in household farms, 1.6 % in farmer households, and 81.7 % in agricultural enterprises. In EAEU countries, a total of 6,109 thousand tons of poultry meat were produced, 86 % of which was attributed to Russia (Table 2). As of June 1, 2024, the slaughter volume across all categories of farms amounted to 184,133.6 thousand tons in live weight and 148,671.4 thousand tons in slaughter weight, which is 8.0% higher than the same period last year.

Table 2 – Poultry production in the EAEU countries, thousand tons

	2017	2018	2019	2020	2021	2022	2022/2017,%
Kazakhstan	179,4	190,7	222,9	236,5	272,6	293,2	163,4
Armenia	10,3	12,3	12,4	12,6	14,6	15,3	148,5
Belarus	488,3	500,1	526,7	539,6	506,7	509,5	104,3
Kyrgyzstan	8,5	8,6	8,8	9,5	11,1	15,6	183,5
Russia	4 940,8	4980,0	5 014,3	5 016,3	5 077,5	5 275,7	106,7

Note: compiled by the authors from the EAEU, FAO, OECD sources [7,8]

The increase in poultry meat export volumes is directly influenced by its competitiveness in the global market. One of the factors determining competitiveness is the price of the product. To assess the attractiveness of foreign markets, it is necessary to consider quality requirements, consumer preferences, logistical routes, and export costs. The competitiveness of domestically produced products is determined by analyzing the average annual price set by poultry producers, as well as export and import prices (Table 3).

It is observed that global prices remained stable between 2017 and 2021. This can be explained by the fact that many countries not only meet the demand of their domestic markets for poultry meat but also export their products to foreign markets.

Table 3 - Intensity of EAEU countries' poultry meat export price and world import price, dollars/ton

	2017	2018	2019	2020	2021
Global import price	1 631	1 537	1 619	1 407	1 627
Export price of EAEU countries	991	1 033	1 280	1 353	1 424
The ratio of the global price to the EAEU export price	65%	49%	27%	4%	14%
Note: compiled by the authors from the EAEU, FAO, OECD sources [7,8]					

The export price trends of EAEU countries demonstrate that their products are competitive in foreign markets. The growth in prices was influenced by the diversity of export products and the expansion of export destinations. In 2017, exports mainly consisted of chicken legs, heads, and necks, priced at approximately \$422–554 per ton. By 2021, poultry meat was being exported to over 50 countries, with the primary consumers being China (59 %) and Saudi Arabia (15 %).

Among the EAEU countries, Russia and Belarus have the highest competitiveness in the global poultry meat market. We conclude that the global poultry meat market is favorable for Kazakhstan to increase its export volumes (Table 4).

Table 4 – Competitiveness of EAEU countries in the poultry meat market

Indicators, 2021	Kazakhstan	Armenia	Belarus	Kyrgyzstan	Russia
Producer price, USD/ton	1 727,7	2 290,2	1 647,4	1 535,9	1 686,5
Export price, USD/ton	1 579,0	-	1 771,3	1 000,0	1 765,5
Production volume, thousand tons	289,7	11,5	506,8	9,5	5 027,3
Production volume per capita, kg	15,3	3,9	54,2	1,4	34,4
Share of export in production, %	8,4	0	37,4	0	6,1
Competitiveness coefficient	1,27	1,37	0,71	0,96	0,68
Note: compiled by the authors from the EAEU, FAO, OECD sources [7,8]					

One of the tools for regulating the poultry meat market is the establishment of quotas. The introduction of a quota system serves as a measure to limit imports and support domestic production. The Treaty on the Eurasian Economic Union, dated May 29, 2014, outlines the procedure and mechanism for quota allocation on certain types of imported agricultural goods, including poultry meat, for member countries. The restriction on imports allowed poultry producers within the EAEU to secure their position in the domestic market and increase their profits (Table 5).

Currently, there are 62 industrial poultry farms, including 36 egg production enterprises, 23 broiler meat producers, and 3 farms specializing in waterfowl meat production [2]. In the Almaty region alone, there are 6 poultry farms dedicated solely to egg production [9].

Table 5 – Volume of tariff quota for fresh, frozen poultry meat (parts), thousand tons

	2017	2018	2019	2020	2021	2022
Kazakhstan	140,0	140,0	140,0	140,0	140,0	140,0
Armenia	0	0	0	0	44,0	44,0
Belarus	10,9	10,9	10,9	10,9	10,9	10,9
Kyrgyzstan	58,0	58,0	58,0	58,0	58,0	58,0
Russia	364,0	364,0	364,0	364,0	364,0	364,0
Note: compiled by the authors from the EAEU, FAO, OECD sources [7,8]						

According to the World of NAN ranking [10], in 2022, the Top-10 companies paid a total of 12.8 billion tenge in taxes, an increase of 22.4 % compared to 2021. The top five farmers contributed over 9.6 billion tenge in taxes: Makinsk Poultry Farm, Ust-Kamenogorsk Poultry Farm, «Alell Agro,» «Alatau-Kus,» and «Otan Green Food» (Table 6).

Table 6

№	Name	Region	type of economic activity	T a x deductions, 2022, mln tg	T a x deductions, 2021, mln tg	growth, %
1	Makinsk Poultry Factory LLP	Akmola region	meat processing and canning	3 165	2 883	10
2	Ustkemen Poultry Factory JSC	East Kazakhstan	breeding of breeding birds	2 252	1 567	44
3	Alel Agro JSC	Almaty	meat and eggs	1 867	1 841	1
4	Alatau-Kus JSC	Almaty	meat and eggs	1 345	1 291	4
5	Otan Green Food LLP	Almaty	breeding of breeding birds	1 012	633	60
6	Capital Projects LTD	Akmola	poultry production	1 010	1 020	-1

7	Prima Bird	Almaty	meat and eggs	612	74	730
8	Kazger Kus LLP	Akmola	egg	592	532	11
9	Nauryz Agro LLP	Almaty	egg	511	190	169
10	PK Izhevsky	Akmola	breeding of breeding birds	471	457	3
Note: [10]						

According to the Kazakhstan Poultry Farmers' Union [11], promising markets for exporting domestic poultry meat are countries in the Middle East, including the United Arab Emirates, Saudi Arabia, Iraq, Iran, Jordan, and Syria. Domestic producers with high potential need to adhere to strict veterinary requirements to deliver poultry meat to these attractive external markets (Table 7).

Table 7 – Potential markets for domestic poultry meat

Countries	Description	Consumption, per capita, kg	Suggestions
Middle East (UAE, Saudi Arabia, Iraq, Jordan, Syria)	<i>Market capacity:</i> 2.2 million tons. Very high population density. High poultry consumption. High purchasing power. Developed retail sector. Opportunity to operate in the premium price segment.	45-60 kg	<i>Main principle:</i> Produce products that comply with halal requirements. Passing accreditation from local veterinary authorities is an important condition. <i>Main competitor:</i> Brazil
African countries (Nigeria, Ghana, South Africa, Congo)	Low price. High competition. Very high population density. High poultry consumption.	20-38 kg	Consumers pay close attention to the packaging being sealed and the weight being 10 kg. There is a high risk in direct trade with the importer and during cargo acceptance. It is necessary to assess the buyer's creditworthiness in advance
Asian countries (China, Japan, Korea, Southeast Asian countries)	<i>Market capacity:</i> China: 1,900,000 tons Japan: 950,000 tons Korea: 130,000 tons High purchasing power. Opportunity to operate in the very high price segment.	10-30 kg	Maintain high production and veterinary standards. Strictly control the quality of products according to the contract, conduct independent inspections before storage and shipment. Establish good relations with importers.
Note: [11]			

To determine the factors affecting the competitiveness and export potential of domestic poultry meat, a SWOT analysis was conducted: (Table 8).

Table – 8 SWOT analysis of competitiveness of domestic poultry meat

STRENGTHS	WEAKNESSES
1. The cost of feed is low; however, it is currently not competitive with import prices in the domestic market. 2. Kazakhstan is one of the leading countries in wheat production and could potentially become a major producer of sunflower meal in the future. 3. Significant support is provided to the sector by the government. 4. Costs for electricity, oil, and gas are low. 5. The presence of skilled professionals. 6. Stable macroeconomic conditions. 7. Stimulating the economy through oil and gas exports allows the tenge to maintain a stable exchange rate and increases the ability to purchase necessary imported resources for the sector.	1. Poultry farming enterprises have a high dependence on state subsidies and protectionist measures such as high import tariffs and quotas. 2. Currently, the production cost of domestic poultry meat is uncompetitive, and the market's main share is held by frozen poultry meat imports from the USA. 3. High dependence on imported feed ingredients. 4. Underdeveloped feed industry. 5. Many poultry farms use outdated technologies and have low hygiene production standards. 6. Lack of management, entrepreneurial, and technical skills among specialists. 7. Absence of export competitiveness due to high logistical costs.
OPPORTUNITIES	THREATS
1. The growing population indicates a further increase in domestic demand for poultry meat. 2. The feed conversion ratio is higher compared to cattle farming. Poultry meat is the most cost-effective source of animal protein. 3. The growth of retail networks stimulates the processing of high-quality poultry products (e.g., chilled parts and ready meals). 4. Fresh poultry meat delivery may create a natural barrier to importing frozen products and promote the creation of high-quality branded domestic poultry products for public catering. 5. Despite the development of domestic market demand, there are opportunities for exporting poultry meat to the European Union and neighboring countries.	1. There is a risk of losing competitiveness due to a significant reduction in state support for poultry producers. 2. There is a significant risk of replacing domestic poultry meat with frozen carcasses imported from Ukraine and Russia, and "gray meat" imported from the USA and Brazil. 3. Failure to invest in the modernization of facilities could lead to a complete loss of competitiveness. 4. Trade liberalization under the WTO and Customs Union could lead to an influx of imported products into the domestic market of Kazakhstan. 5. The risk of worsening sanitary-epidemiological conditions due to avian influenza negatively affects the sector's profitability and demand for poultry meat.
Note: compiled by the authors from the literature sources of the authors [2,5,6,9].	

The analysis of poultry meat competitiveness indicates that for the development of the sector, it is necessary to improve cooperation with EAEU member states, reduce dependence on imports, stimulate poultry meat exports, and provide state support to producers.

Conclusion

Thus, the analysis of the competitiveness of domestic poultry meat has led to the conclusion that the main trends in the development of domestic poultry farming should be:

1) Creating favorable conditions for attracting direct investments into the domestic poultry farming sector, including in breeding poultry; adopting state development programs for feed and feed additives.

2) Developing and implementing potential projects for financing from the Eurasian Development Bank and other international financial institutions.

3) Developing and implementing information technologies in poultry farming. Creating national information systems for identifying, registering, and monitoring poultry products; forming, maintaining, and using a common database for accounting and monitoring.

4) Developing and implementing an automated system for recording breeding poultry.

5) Training and retraining personnel for the poultry farming sector.

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ОТАНДЫҚ ҚҰС ЕТІНІҢ БӘСЕКЕГЕ ҚАБІЛЕТТІЛІГІН ТАЛДАУ

Зерттеудің мақсаты – Қазақстанның азық-түлік қауіпсіздігін қамтамасыз ету үшін отандық құс етінің бәсекеге қабілеттілік деңгейін арттыру, оның басқа салалармен ынтымақтастығы бағыттарын әзірлеу.

Зерттеу нәтижелері – мақалада отандық құс еті нарығының даму тенденциялары талданды; құс еті нарығының тауарлық-географиялық құрылымының ерекшеліктеріне баға беріліп, отандық құс еті нарығының бәсекеге қабілеттілігін арттырудың жаңа бағыттарын зерттеуге басты назар аударылды. Отандық құс еті нарығында құс етін өндіру көлемі мен құрылымына баға берілді, отандық құс еті өндірісінің дамуына кедергі келтіретін факторлар анықталды, отандық құс етінің бәсекеге қабілеттілігін қамтамасыз ету үшін тұжырымдамалық бағыттар мен оларды іске асыру тетігі әзірленді.

Зерттеу қорытындысы отандық құс еті нарығын талдау, инновациялық әлеует пен бәсекеге қабілеттілікті бағалау отандық құс етінің бәсекеге қабілеттілігі мен тиімділігін арттырудың негізгі бағыттарын тұжырымдауға мүмкіндік берді. Әлеуеті жоғары кәсіпорындарда инновацияларды енгізу; кәсіпорындарда интеграциялық процестерді дамытудың прогрессивті шетелдік тәжірибесін енгізу; импортты толық алмастыруға бағытталған саланы мемлекеттік реттеу; құс шаруашылығы кешенінің қызметін ақпараттық және заңнамалық қамтамасыз ету; өнімді сатудың цифрлық платформаларын және өндірісті басқарудағы цифрлық технологияларды дамыту маңызды стратегиялық қадамдар болып табылады.

Кілтті сөздер: ауыл шаруашылығы, құс еті, отандық нарық, бәсекеге қабілеттілік, мемлекеттік қолдау.

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АНАЛИЗ КОНКУРЕНТОСПОСОБНОСТИ ОТЕЧЕСТВЕННОГО МЯСА ПТИЦЫ

Цель исследования – разработка направлений повышения уровня конкурентоспособности отечественного мяса птицы, его кооперации с другими отраслями для обеспечения продовольственной безопасности Казахстана.

Результаты исследования – в статье проанализированы тенденции развития отечественного рынка мяса птицы; оценены особенности товарно-географической структуры рынка мяса птицы, а основное внимание уделено изучению новых направлений повышения конкурентоспособности отечественного рынка мяса птицы.

Оценен объем и структура производства продукта на отечественном рынке мяса птицы, выявлены факторы, сдерживающие развитие отечественного производства мяса птицы, разработаны концептуальные направления и их реализация для обеспечения конкурентоспособности отечественного мяса птицы.

Вывод исследования заключается в том, что анализ отечественного рынка мяса птицы, оценка инновационного потенциала и конкурентоспособности позволили сформулировать основные направления повышения конкурентоспособности отечественного мяса птицы. Внедрение инновации и прогрессивного зарубежного опыта развития интеграционных процессов на предприятиях с высоким потенциалом; государственное регулирование отрасли, направленное на полное импортозамещение; информационное и законодательное обеспечение деятельности птицеводческого комплекса; развитие цифровых платформ реализации продукции

и цифровых технологий в управлении производством являются важными стратегическим шагами.

Ключевые слова: сельское хозяйство, мяса птицы, отечественный рынок, конкурентоспособность, государственная поддержка.

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