Czech University of Life Sciences Prague

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Bachelor Thesis

Strategy for the development of meat industry in Kazakhstan

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CZECH UNIVERSITY OF LIFE SCIENCES PRAGUE

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BACHELOR THESIS ASSIGNMENT

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Economics Policy and Administration
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Thesis title

Strategy for the development of meat industry in Kazakhstan

Objectives of thesis

The main purpose of the study is to analyse a meat producing in the country of Kazakhstan and, based on things observed, to provide a suitable recommendation for development. Based on the identified problems in the activities of meat industry enterprises, then it will be necessary to formulate a recommendation strategy for the further development of the whole meat sector.

Research objectives: to define the position of meet industry in Kazakhstan; to define cattle industry development; describe policy agenda and governmental support for cattle production in the country; consider the main components of the competitiveness of enterprises in the meat industry.

Along with everything mentioned above, one of the main objectives of research is to answer three hypothetical questions:
- How should a meat producing entity in Kazakhstan develop its production?
- What can be changed in national framework in order to positively influence the meat industry in Kazakhstan?
- What techniques should be used in the field of production to make industries flourish?

Methodology

This work features various quantitative and qualitative methods of analysing meat production in Kazakhstan. Quantitative analysis will be used when discovering import and export opportunities, SWOT analysis of the enterprises of the meat industry in Kazakhstan will be used in order to underline a list of suitable recommendations.

Along with the rest of quantitative methods, the calculation of self-sufficiency of bovine meat in Kazakhstan will be delivered in order to understand if imports are outweighing the exports in the country, if the country is self-sufficient in bovine meat at all, and, whether the exporting potential of Kazakhstan is high or low.

The proposed extent of the thesis

40 – 50 pages

Keywords

Meat production, cattle, beef, farmer, agriculture, competition, strategy, control

Recommended information sources

Abaeva N. P. (2018) Competitiveness of a business entity. Ulyanovsk: UlGTU, 2018.
E Dauletbakov B. Khozhanov. Formalization of competitiveness among agricultural industries in modern Kazakhstan
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Veselkov S.N. (2019) Strategic management. Successful management of business in Russia. Manual . M.: Unity, 2019.

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Declaration

I declare that I have worked on my bachelor thesis titled " Strategy for the development of meat industry in Kazakhstan " by myself and I have used only the sources mentioned at the end of the thesis. As the author of the bachelor thesis, I declare that the thesis does not break copyrights of any their person.

In Prague on 15.03.2021 _______________

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Abstract

The development of animal husbandry and the meat industry is among the priorities of Kazakhstan. Considering that the strategy of economic growth of Kazakhstan provides for both the desire for a competitive presence in the global market and the development of Kazakhstan's agro-industrial complex. The share of livestock products in Kazakhstan's agricultural products' total gross volume is more than 52%. In these conditions, the question of a systematic approach to the development of Kazakhstan's animal husbandry as an agricultural sector is more relevant than ever.

In the theoretical part, strategic management was considered with an emphasis on competitive advantages. The strategy is a look at the long-term future to determine what the company wants to achieve and develop a plan for how to achieve it. The goal of a strategy is to define and communicate a picture of the enterprise through a system of core goals and policies. In order to form competitive advantages for meat and meat products producers, we can recommend the Indicator "safety", that is, to confirm the quality of products with documentation on mandatory certification, to emphasize the usefulness and safety of these products.

The study examines the current state of the meat industry in Kazakhstan and highlights development problems. The main factors influencing the increase in the competitiveness of meat processing enterprises are considered. Recommendations for improving the competitive functioning of the meat products market are offered. In the field of state support for the meat industry in Kazakhstan, it is necessary to improve the approaches and methods of work to improve the genetic potential of CATTLE. In this regard, in addition to reproductive animals, an indexed assessment is required to determine the reproductive value of animals, molecular genetic examination, which makes it possible to provide more accurate information about the origin of the reproductive animal. industry.

Keywords: Meat production, cattle, beef, farmer, agriculture, competition, strategy, control.

Strategie rozvoje masného průmyslu v Kazachstánu

Absrtact

Rozvoj chovu zvířat a masného průmyslu patří mezi priority Kazachstánu. Vzhledem k tomu, že strategie hospodářského růstu Kazachstánu poskytuje jak touhu po konkurenčním působení na globálním trhu, tak rozvoj kazašského agroprůmyslového komplexu. Podíl živočišných produktů na celkovém hrubém objemu kazašských zemědělských produktů je více než 52%. Za těchto podmínek je otázka systematického přístupu k rozvoji chovu zvířat v Kazachstánu jakožto odvětví zemědělství důležitější než kdy dříve.

V teoretické části bylo uvažováno o strategickém řízení s důrazem na konkurenční výhody. Strategií je pohled do dlouhodobé budoucnosti s cílem určit, čeho chce společnost dosáhnout, a vypracovat plán, jak toho dosáhnout. Cílem strategie je definovat a sdělovat obraz podniku prostřednictvím systému hlavních cílů a politik. Abychom vytvořili konkurenční výhody pro výrobce masa a masných výrobků, můžeme doporučit indikátor „bezpečnost“, tj. Potvrdit kvalitu výrobků s dokumentací o povinné certifikaci, zdůraznit užitečnost a bezpečnost těchto výrobků.

Studie zkoumá současný stav masného průmyslu v Kazachstánu a upozorňuje na rozvojové problémy. Jsou brány v úvahu hlavní faktory ovlivňující zvýšení konkurenceschopnosti podniků na zpracování masa. Jsou nabízena doporučení pro zlepšení konkurenčního fungování trhu s masnými výrobky. V oblasti státní podpory masného průmyslu v Kazachstánu je nutné zlepšit přístupy a pracovní metody ke zlepšení genetického potenciálu SKOTU. V tomto ohledu je kromě reprodukčních zvířat vyžadováno indexované posouzení ke stanovení reprodukční hodnoty zvířat, molekulárně genetické vyšetření, které umožňuje poskytnout přesnější informace o původu reprodukčního zvířete.

Klíčová slova: Produkce masa, skot, hovězí maso, zemědělec, zemědělství, konkurence, strategie, kontrola.

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1. Introduction

Global meat production is projected to decline by the end of 2020 due to animal diseases associated with the coronavirus pandemic, market disruptions, and droughts' lingering effects. The international meat trade is likely to show moderate growth, mainly supported by strong imports from China. Total global meat production is projected to fall to 333 million tons (carcass weight equivalent) by the end of 2020, down 1.7 percent from 2019, marking the second straight year of decline. Much of this decline is expected to reflect a sharp drop in the global production of pig meat, mainly concentrated in Asian countries affected by African swine fever virus disease and cattle meat, especially in the United States of America (USA) and other countries. On the contrary, global poultry production is projected to grow, albeit twice as fast as 2019. Moderate production growth is also forecast for mutton. Market disruptions have negatively impacted all meat industries' expansion rate due to the coronavirus pandemic, which has exacerbated animal disease. The international meat trade is projected to grow to 37 million tons at the end of 2020, an increase of 2.4 percent year-on-year, but significantly slower than the 6.8 percent recorded in 2019, largely reflecting a possible decline in global meat consumption in line with expectations of a wider economic downturn. Logistics bottlenecks, transport restrictions, and port delays can also constrain the global meat trade growth. China is expected to provide most of the trade momentum as imports are expected to grow 24 percent a year. The expected global growth in demand for meat imports is expected to be driven primarily by increases in exports from Brazil, the United States, and the European Union (Food Outlook, 2019).

Following ongoing reforms of animal husbandry in Kazakhstan, the government expected that in 2020 the overhead cattle population would grow by 61%, the country will be fully provided with high-quality meat, and the surplus beef will be exported, which will reach 60 thous. Tons in 2016 and 180 thous. Tons in the 2020 year.

For this, the livestock industry received huge subsidies - up to 1600 tenge per kilogram of beef. However, the country still lacks meat, and it is forced to import it from Belarus, Russia, Ukraine, and Latin America. Export is growing, and foreign goods cannot be substituted in the domestic market. In 2019, Kazakhstan shipped 22.6 thous abroad. Tons of meat of all kinds and imported about 200 thous. Tons. Thus, the total import of meat to the country is almost 9 times higher than its export, and of beef - 5 times (stat.gov.kz, 2019).

The plan to create a successful livestock industry has failed. The promised breakthrough in the export of meat, the realization of which was worth millions of dollars, culminated in the massive sale of live cattle abroad. In January 2020, the Ministry of Agriculture was forced to introduce a complete ban on the export of live cattle until the end of September 2020.

The bulk of overhead livestock (61%) is concentrated in private subsidiary farms with poor reproduction, veterinary services, and feed that does not meet the needs of animal husbandry. Small, scattered producers are not funded (Eurasian Integration, 2020).

Of course, animal husbandry's further development depends on many factors: a high-quality feed base, the genetic potential of animals, the introduction of modern technologies, and innovations. One of the most important tasks is to attract funds to the industry and provide it with comprehensive financial support. The main thing is that the state not only takes special control over the safety of overhead breeding but also remembers that the basis of any development is the creation of added value and also actively works on the problem of Kazakh meat processors entering foreign markets with finished products. We need a state program to support the deep processing of livestock raw materials. Its implementation will allow meat processors to increase profitability and purchase livestock at higher prices from domestic agricultural producers.

Thus, it is obvious that Kazakhstani animal husbandry has a large number of problems. Therefore, not only the government but also the enterprises themselves must develop a strategy for further development. Since the main type of meat consumption in Kazakhstan is beef, we will focus on it in this study.

2. Objectives and Methodology

2.1 Goals and Objectives

The main purpose of the study is to analyze a meat industry in the country of Kazakhstan and, based on things observed, to provide a suitable recommendation of development for similar enterprises in the field of meat production in Kazakhstan. In accordance with the logic of the study, further, it is necessary to analyze the state of development of enterprises of the meat industry in the Republic of Kazakhstan. Based on the identified problems in the activities of meat industry enterprises, then it will be necessary to formulate a strategy for the further development of these enterprises.

Research objectives: to define the position of meat industry in Kazakhstan on the local level; to define cattle industry development vector in the country of research, as well as the methodology for the formation of the strategy of meat-oriented enterprises; describe policy agenda and governmental support for cattle production in the country; consider the main components of meat industry, determine strategic directions for the development of meat industry enterprises.

Along with everything mentioned above, one of the main objectives of research is to answer three hypothetical questions: how should a meat producing entity in Kazakhstan develop its production; what can be changed in national framework in order to positively influence the meat industry in Kazakhstan; what markets can be used in the future for meat and meat products of cattle.

2.2 Methodology

The methodology of this thesis is based on the theoretical reflections and breakdown of governmental aid, actual situation in the meat market in Kazakhstan and the total number of animals involved in meat production. The main focus is put on imperfections of governmental support for meat industries and their current strategies of development. Data pooled for the purpose of analysis is accompanied with relevant definitions and explanations on the nature of phenomena.

As for the practical part, own analysis was performed based on the following pieces of information: exported quantity of meat, gross production of cattle, total meat consumption, average price, bovine meat imported quantity which were based on information taken from Kazstat and FAOSTAT. In addition, different approaches to the analysis were taken by the author:

1. SWOT analysis based on own data and viewpoint.
2. Self-Sufficiency analysis based on data from FAOSTAT and Kazstat, the formula used for the calculation is Production (P) / Internal consumption (Z).
3. Trendline analysis based on data from Kazstat.
4. Growth rate analysis of cattle production based on data from Kazstat, the formula used for the calculation is New volume of (Production – Old volume of Production)/(Old volume of Production)
5. Market share of meat production based on Kazstat, the formula used for the calculation is Volume of meat production / Total volume of production.

3. Theoretical Aspects of Strategic Control

3.1 Strategic control: Understanding and Characteristics of Conducting

A strategy is an ambitious project or overall “plan” that an organization chooses to move forward or respond to a set of goals using its resources. Strategies most often use a common agenda and implicit allocation of resources to achieve overarching goals. The strategy helps the organization to cope with uncertain situations with due diligence (Malyuk, 2016).

The word "strategy" entered the field of management from military science, where speech.

In the field of management, the concept of strategy is viewed in a broader context. Specifically, the strategy is a long-term perspective to determine what the company wants to achieve and develop a plan for how to achieve it.

A.V. Kurlykova defined strategy as "a model of main goals, objectives, and main policies or plans to achieve goals stated in such a way as to determine what business the company is in or should be in." This definition of the strategy focuses on the goal and means of achieving this goal (Kurlykova, 2018).

B.G. Litvak defines strategy as "the way a corporation seeks to differentiate itself positively from its competitors by leveraging its relative strengths to meet customer needs better." The definition emphasizes the competitive aspect of the strategy and the strengths required to meet customer needs. Thus, this definition aims to meet customer needs as the driving force of the strategy (Litvak, 2016).

The strategy is a unified and comprehensive plan that links the firm's strategic advantage with the challenges of the environment and aims to ensure that the main objectives of the enterprise are achieved through an appropriate implementation process. This definition of strategy emphasizes the following: one comprehensive plan, the strategic advantage associated with environmental problems, proper implementation to ensure the achievement of the main objectives.

Below is another definition of strategy, which also applies to its external environment. "Strategy is a model of an organization's response to the external environment over a period of time to achieve its goals and mission." This definition emphasizes the following: it is a model of the organization's response to the external environment; the goal is to achieve the tasks (Veselkov, 2019).

The strategy basically involves identifying and evaluating alternative pathways to an already established mission or goal and ultimately choosing the best alternative to be accepted. Based on the above definitions, one can understand the strategy's nature (O.D. Volkogonova, 2016). Several aspects regarding the nature of the strategy:

1. The strategy is one of the main directions of activity, with the help of which the organization correlates itself with the environment, in particular, with external factors that contribute to the implementation of all activities related to the achievement of the organization's goals (A.Zub, 2015).

2. Strategy is a combination of internal and external factors. To meet the opportunities and threats created by external factors, they correspond to internal factors (Golubkov, 2015).

3. A strategy is a set of actions to fulfill a certain condition, solve certain tasks, or achieve the desired goal. The steps are different for different situations. Due to its dependence on variables, the strategy can be associated with contradictory actions. An organization can take conflicting actions either simultaneously or over a period of time. For example, a firm is closing a part of its business and at the same time expanding a part (Zaitsev, 2017).

4. The strategy is future-oriented. Strategic action is necessary for new situations that have not arisen previously in the past.

5. The strategy requires certain systems and norms for its effective implementation in any organization.

6. Strategy provides a general framework for guiding the thinking and actions of the enterprise.

A strategy aims to define and communicate a picture of the enterprise through a system of core goals and policies. The strategy is about the unified direction and efficient allocation of the organization's resources.

Strategic enterprise management must take into account market trends. That is, it depends on external conditions. Within the framework of this study, the meat market is considered.

Therefore, to create favorable conditions for the functioning of meat companies, it is necessary to know the trends in the meat market. Figure 1 shows the dynamics of the consumption of cattle meat.

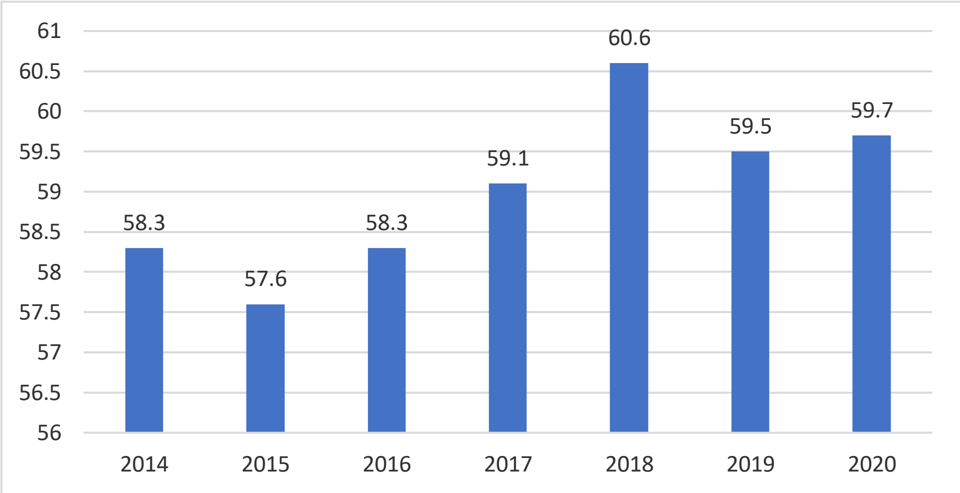


Figure 1: Dynamic of World Meat Consumption in 2014-2014, mill. tons
(Compiled on the basis of data Overview: peaceful production and consumption of beef //https://agrovesti.net)

It can be seen that the consumption of CATTLE meat is the highest in 2018 - 60.6 million tons. In 2019-2020 decrease in consumption to 59.5 and 59.7, respectively. Figure 2 below shows the largest CATTLE meat-consuming countries.

There is a growing demand for animal protein worldwide, and rising incomes and continued urbanization will support the cattle meat market in the long term. The increase in cattle overhead in Argentina, Paraguay, Uruguay, and other countries will ensure a sufficient supply of beef in the world market. Geographically, the main growth in demand for cattle meat will come from China, against the backdrop of developing the country's food industry.

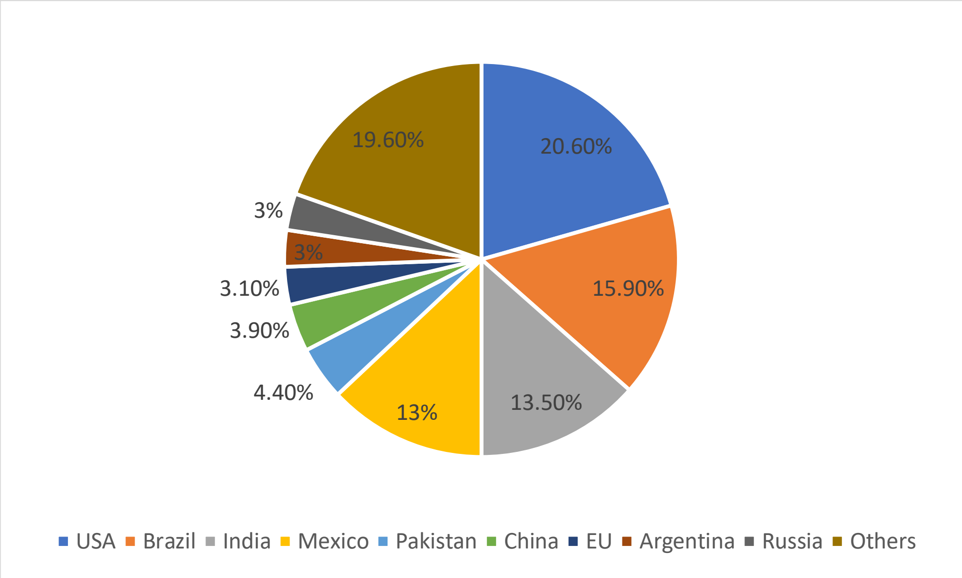


Figure 2: Biggest Consumers of Cattle Meat in 2020, %
(Compiled on the basis of data Overview: peaceful production and consumption of beef // https://agrovesti.net)

Population growth in Muslim countries will drive demand for halal beef.

Growing global demand for food of animal origin, linked to rising living standards in developing countries, drives up import demand and prices for CATTLE meat amid constrained supply growth. This explains the stable growth in export prices since 2016. This trend may change in 2020 due to the beginning of the global recession. The main geographic driver of CATTLE meat prices in Asian countries, especially China, due to African swine fever and the search for pork substitute products. Despite the growth in CATTLE meat's domestic production, China is increasing the number of importing enterprises with access to the market. Among them are companies from Brazil, Argentina, South Africa, and the EU.(fao.org)

The growth in demand for meat also affects Kazakhstan, where agriculture is underdeveloped, and the economy of the state is focused on raw materials. The agrarian sector in the structure of the Kazakhstan economy occupies 5-7%. This figure could and should be higher. Kazakhstan ranks second in the world in terms of arable land per capita and is the largest exporter of grain. Now in the country, about 74% of the territory is dedicated to agriculture. About 42% of the population lives in the countryside. The industry employs 1.4 million people, second only to the wholesale and retail trade. The average salary in the first quarter of 2020 was 70,840 tenge (approximately US $ 133). This Indicator is ranked 12th out of all industries. Nevertheless, despite its advantage in agriculture, Kazakhstan is ranked 50th in the food security index out of

113 countries. AGRICULTURE has little effect on the country's economy. The low level is also evidenced by the countryside's amount of income (Agrarian Policy in Kazakhstan, 2020).

Kazakhstan exports agricultural products to 72 countries, including:

- to China - wheat, wheat bran, soybeans, alfalfa, rapeseed meal, barley, corn, flax seeds, wheat feed flour, and wheat flour;

- to Iran - wheat, barley, sunflower seeds, rapeseed, and flax.

- to the CIS countries - fruit and vegetable crops, wheat, corn, rice, sunflower seeds, rapeseed, and flax.

- to EU countries - wheat, flax seeds.

Before the pandemic, the export of products grew by almost 6.5% and amounted to 3.3 bills. Dollars. However, in 2020, export decreased by almost 10% and amounted to 2.1 bills. Dollars.

In the field of crop production, various types of subsidies are provided, including: for the development of production of priority crops, including perennial plants; for the development of seed production; subsidizing the cost of fertilizers and pesticides, bioagents; subsidizing the cost of water supply services to agricultural producers. The amount of subsidies is growing every year: in 2018, 63.2 bills were allocated. Tenge; in 2019 - 65.4 bill. Tenge; in 2020 - by 86.8 bills. Tenge (Economics AGRICULTURE, 2020).

The granting process is automated. All applications are checked for compliance with the conditions of subsidies through integration with other information systems and databases on the Qoldau. kz website. The main conditions for obtaining subsidies are the availability of a land plot and confirmation of costs because they are issued ex post facto as reimbursement of part of the costs incurred. (Economics AGRICULTURE, 2020).

Thus, in Kazakhstan, there is state support for the agricultural sector, but there are significant problems that hinder the development of the industry. First of all, this is corruption, due to which the allocated funds for helping agro companies and ordinary farmers do not reach the addressee. Besides, there are not enough people willing to engage in agriculture among the country's residents. There is an outflow of the population from the countryside to the city. Besides, there are not enough enterprises for processing agricultural products, Kazakhstan exports raw materials, and processing and production of semi-finished products is insufficient for the population.

3.2 Methods of Formalization of Companies Based on International Examples

Strategic management has become part of management practice. The main thing in modern conditions was not so much the enterprise's work as a whole, but rather in a competitive market segment - in a given industry or subsector. In American companies, these segments were called strategic centers. (Barinov, 2017).

In large American meat companies (for example, Cooper Farms), a management structure was created to develop and implement a strategy that does not coincide with the company's organizational structure. This system's main elements are strategic management centers, including production offices in the following areas: production and sales, research center, technology center, etc. The number of such centers in American companies is much less than the number of production offices. For example, Perdue Farms, Inc. for production offices are grouped into 37 strategic centers (Barinov, 2017).

Butterball LLC, a turkey meat producer in the USA, for example, has built its strategic management system in such a way that all production sectors, including production groups, distribution enterprises, are distributed among strategic centers so that they are responsible not only for planning and implementation strategy but also for the result - profit.

The strategic management system focuses on developing goals, which then form the basis for long-term planning. An outline of the goals developed by the Japanese meat company NH Foods can be represented as follows:

Basic goals.

1. Sales volume.

2. Growth rates (sales or profits).

3. Profit: the amount of profit, the rate of return on all capital (or all assets), the ratio of profit to capital, the ratio of profit to sales, earnings per share.

4. Market share.

5. Capital structure, etc.

Meat companies are also using competitive strategies. An example of the application of a competitive strategy is "AIR PRESS Co., Ltd." (semi-finished meat products). The company's strategy assumes the use of new production methods: computer production planning in all areas of design and production, including raw materials and parts, the needs of which are calculated using a computer.(airpress.co.uk)

Strategic management also uses results management. The direction of the management of the company "A-Pihvi Kauhajoki Oy" (meat processing, Finland) to achieve the ultimate goals was called "results management" in Finnish enterprises. The goals are formed in quantitative terms (sales volume, profit, profitability).

Based on the above, the following strategic management tools can be offered for Kazakhstan companies: the creation of strategic management centers (research center, sales center, production center, etc.); setting specific goals; focus on competitors: leading in new production methods; results management.

3.3 Main Aspects of Competitiveness of Meat Production Companies

Competition means the rivalry of enterprises in economic conditions when manufacturers seek to capture a certain market share (Abaeva, 2018).

Competitiveness is the main factor behind a healthy growth and lifecycle of each industry. Having understood that, local producers under highly competitive environment set such goals and objectives as satisfying needs existing in the market, profit maximization and increasing the volume of sales in internal and external markets, providing the desired level of quality for the entire production series, research and development and, finally, modernizing the level of production line. What is particular about this step, is that the logical consequence is setting new goals in exploring competitiveness of industries as underlying “subjects” of economic relations between competitors. Primarily, the biggest goal is to create advantages over competitors, as well as to figure out the most important resources to raise the firm’s competitiveness and finding proper mechanisms and ways of their realization. (Cuckovic, Bartlett, 2007).

To manage an enterprise's competitiveness to be effective, it must be carried out in the direction of a targeted social, communication, and economic nature. In order to obtain results at various levels of competitiveness of the meat industry enterprises, a careful study of several factors is required:

1. Meat market. Particular attention should be paid to its capabilities, geographic location, and specialization. (Vashko, 2018).

2. Competitive environment. It is important to understand what advertising materials are used, methods and forms of marketing activities, features, and types of packaging, features of goods and brands themselves.

3. Customer needs. Potential consumers are investigated for unmet needs in a certain segment, the formation of preferences, motives for buying a specific product, directions, and ways of using services and goods (Vashko, 2018).

4. Product evaluation. The market and consumers of meat are investigated to understand which of the meat products requires approximately the same actions. It also allows for the creation of requirements that will be presented in the future. (Vashko, 2018).

5. The parameters of a specific type of product are compared with each other and with existing standards, after which a thorough analysis is carried out.

While considering the current level of social and economic development and unstable environment, it was possible to formulate such a definition as "product's competitiveness" with a regard to product's characteristics and its popularity among consumers. Therefore, competitiveness of meat production can be characterized as a synergy of consumers' characteristics which describe product's differences from the products of competitors relatively to the degree of satisfying needs of customers while keeping the average level of pricing. (Zelga, 2017).

Handling the matters of product's competitiveness lies in identifying mechanisms of realization of development's reserves of efficient realization that prompts the support of consumers' desired level of quality at all stages of product's lifecycle, cutting the costs of production and living up to consumers' expectations given the existing boundaries of particular production variety (Faulkner, Bowman, 1996).

Management of production line's competitiveness is usually influenced by various factors of technological, organizational, economic, social and phycological nature. The upshot of analyzing the theoretic part of the problem and its applied aspects, helped the author to formulate the main parameters of managing the competitiveness of the entire meat industries' production that is strongly influenced by market factors. (Lesniewski, 2014).

The main criterion for the competitiveness of any meat product on the market is the ability to meet customers' specific needs. . (Lesniewski, 2014).

Meat products can be called competitive if they surpass the analogs existing on the market at least in one or several characteristics moreover if the consumers themselves consider these parameters to be significant for themselves.

In order to determine competitiveness, it is necessary to compare:

- the cost of this meat product with analogs;
- consumer characteristics;
- demand in emerging markets;
- conditions of the offer on the market;
- the impact of the quality and price of meat products on the company's competitiveness.

In achieving competitiveness, the quality of meat products is important.

Price can affect the competitiveness of meat products in different ways. When it comes to low- and middle-income consumers, they are interested in lower prices. On the contrary, the high price makes the product more attractive for the wealthy categories of citizens. Buyers themselves evaluate the properties before purchasing. Furthermore, see if these characteristics correspond to specific preferences. The main thing is the optimal balance between the cost of purchasing a unit of the product and the properties of the product.

The current state of the competitiveness of enterprises in the meat industry in Kazakhstan indicates that they operate in the following conditions:

- limited raw materials, financial, technical, and labor resources;
- unsolved social and labor problems; low level of quality of management, organization of production and cost accounting;

- low purchasing power of the population with the formation of high prices for meat and meat products and low competitiveness of most enterprises in the industry in the domestic and foreign markets. (B. Dauletbakov E. Khozhanov, 2018).

The production and processing of competitive meat products are low. The development of the industry is particularly negatively affected by the shortage of domestic raw materials, increased costs for its supply and distribution of finished products. Within the regions, the market for meat and meat products is represented mainly by monopolistic competition; some of its segments are moderately concentrated.

To form competitive advantages for meat and meat products manufacturers, we can recommend the Indicator "safety," that is, to confirm the quality of products with documentation on mandatory certification, to emphasize the usefulness and safety of these products.

3.4 Assessment of Governmental Aid for Meat Productions

The prime minister signed amendments to the decision on the approval of the State Program for the Development of the Agro-Industrial Complex of the Republic of Kazakhstan for 2017-2021. The updated document indicates the number of subsidies for the development of animal husbandry and beef processing in 2021 (Adilet.zan, 2021).

According to the document, 96,573.6 million tenges from local budgets will be directed to subsidizing the costs of developing livestock and increasing the productivity and quality of livestock products, including costs to support beef production and processing (Adilet.zan, 2021).

186,157 million tenges will be allocated in subsidies to reimburse some of the costs incurred by the AGRICULTURE units in investments, including support for beef production and processing. It is planned to allocate 97 514 million tenges to subsidize the rates of payment of loans to AGRICULTURE organizations and leasing for the purchase of farm animals, machinery, and technological equipment, including to support the production and processing of beef. Besides, the target indicators for the export of agro-industrial products were adjusted in the amount of 3 135.3 million. USD per year, including projected beef exports of 0.12 million. Dollars USA.

Changes and additions have been made to the Rules for the development of animal husbandry. In particular, noticeable changes affected subsidies for sheep breeding: the norms for conducting cattle-breeding and livestock-raising operations with sheep breeding from 2.5 to 4,000 tenge, with trade - from 1.5 to 2.5,000 tenge. Livestock purchase standards (from 8 to 15,000 tenge) and; import sheep breeding was also increased (up to 150,000 tenge overhead). The guarantee policy for loans for the purchase of livestock was changed, and the processing time for loan applications on farms and feeding grounds was optimized. Livestock can now be purchased with a 1: 1 liquidity ratio. At the same time, after receiving subsidies from farmers, the guarantee of solid collateral will be 15%. The remaining 85% will be provided by purchased livestock. To further support pastoralists, the cost of diagnostic tests during the quarantine period was reduced from 23,500 tenges to 4,271 tenges per cow and 28,500 tenges per cow, to 8741 tenges per bull imported from the EU.

In connection with the appeals of governments and agricultural producers, the Ministry of Agriculture carried out work to optimize the costs of diagnostic studies of imported cattle during the quarantine period. Since the epizootic situation of especially dangerous animal diseases is stable in the European Union, it was decided to reduce to one PCR test for animals imported from the EU during the quarantine period for Schmallenberg disease. Reducing research costs will significantly reduce the burden on farmers when importing imported livestock. It should be noted that the prices for diagnostic tests for the quarantine import of animals to all regions of the Republic of Kazakhstan are the same.(Ministry of Agriculture 2018)

The cost of livestock research in Canada (in the list of diseases indicated in the veterinary certificate certificates) will be 1978 tenge per cow if the animal is not used naturally and 3267 tenges per cow if the animal is used naturally. The cost of studying a bull is 6448 tenge and 7737 tenges, respectively. For animals from the USA: for a cow - 2697 tenge, for a bull - 7167 tenges. For cattle in Australia: for a cow - 1408 tenge, for a bull - 2984 tenge. For cattle from Latin America: for a cow - 4120 tenge, for a bull - 8590 tenges. For cattle imported from the EAEU Member States (Russian Federation and Belarus): 3,183 tenges (unvaccinated against viral diarrhea and infectious rhinotracheitis) and 1,978 tenges (vaccinated), 7,653 tenges (unvaccinated), and 6,448 tenges (vaccinated).

In 2020, in the first half of the year, the import of 22,000 overheads to the country was financed, and about 10,000 overheads were already imported to Kazakhstan. Due to the import of livestock breeding abroad, today, the share of livestock breeding in the country has increased significantly and amounted to 12% of the total number of cattle. In recent years, there has been an increase in the number of farms participating in the cattle breeding work program using meat bulls. Since 2014, the number of such farms has more than tripled and exceeded 20.5 thous. Over 1.1 million overheads, or 33% of all overhead livestock, are affected by breed transformation.

In addition, in the dairy farming sector, with the aim of import substitution, projects are being carried out to strengthen and expand dairy farms' network. In 2019, 8 industrial and 14 family farms with a capacity of 40,000 tons of milk were commissioned. However, there is still import of dairy products in the volume of 464 thous tons per year. Therefore, the annual commissioning of 25 industrial dairy farms is a short to medium-term challenge.

Thus, thanks to the measures taken, it is planned to completely close the issue of import substitution by increasing processed milk by 500 thous tons in 5 years. In the first half of 2020, Kazakhstan put into operation 6 large dairy farms with a total of 3,810 overhead cattle; by the end of 2021, it is planned to launch another 16 such farms.

In order to simplify the procedure for the compulsory passage of a comprehensive private examination in the construction of livestock projects, the Ministry of Agriculture initiated a proposal to amend the development of infrastructure, which determines the procedure for classifying buildings and structures as technical and (or) technologically complex objects. The Ministry of Agriculture was asked not to classify livestock complexes with an overhead of up to 1.5 thous. Overhead to technically complex objects. This will allow farmers not to carry out state examinations of projects and feasibility studies of livestock complexes, which takes a lot of time. Passing a mandatory comprehensive non-corporate review of projects of livestock complexes and farms for the production of milk, meat products, fattening plots with the number of livestock up to 1.5 thous. (inclusive), as well as pig farms with overheads up to 10 thousand (inclusive) are no longer needed. This measure will speed up the implementation of investment projects in animal husbandry and significantly reduce the costs of farmers (Adilet.zan, 2021).

The program for the development of the agro-industrial complex of the Republic of Kazakhstan for 2017-2021 provides for the following measures of state support:

- investment subsidies (reimbursement of 25% of investments made in priority areas of AGRICULTURE. The cost of purchased agricultural machinery and equipment is also subsidized);

- resumption of subsidizing the interest rate (the rate of remuneration for fixed assets is reduced by 10%, and the rate on renewable assets - by 5% per year);

- development of guarantee institutions (in the absence of sufficient guarantees, support is provided for partial collateral and credit insurance);

- creation of a mechanism for obtaining agricultural receipts (will allow investors/lenders to finance agricultural production by selling the crop before its actual harvest (under the guarantee of the future harvest));

- improvement of the agricultural insurance system (it will cover up to 80% of the costs of spring and fieldwork in the event of an insured event, and the determination of the insured event will be carried out on objective data without the "human factor," on the basis of official statistics, data of spatial land detection).

In addition to financial support measures, subsidies are carried out in areas such as seed production, improving the productivity and quality of livestock products, increasing the cost of fertilizers, herbicides, subsidizing the delivery of irrigation water, and many others.

The current legislation provides for the following special tax regimes for agricultural producers:

- a special tax regime for agricultural producers and agricultural cooperatives;

- a special tax regime for peasant households or farmers.

For agricultural producers of cooperatives applying a special tax regime, it is planned to reduce the size of taxes by 70%, with the exception of the agricultural tax, land use duties, and value-added tax.

For peasant or agricultural holdings (KFH), a single land tax is established in the amount of 0.15% to 0.6% of the estimated value of the land. Peasant farms are not payers of such types of taxes as individual income tax, social tax, environmental emission duties, property and property taxes, transport and property taxes. Foreign legal entities, foreigners, and stateless persons cannot apply special tax regimes to agricultural producers.

At the same time, the state policy is being implemented to provide affordable credit funds to agricultural producers, including for the development of animal husbandry, crop production, and processing of agricultural raw materials. These measures are funded from the budget and are mobilized.

At the same time, the Ministry of Agriculture, as the operator of the second direction of the Program for the Development of Productive Employment and Mass Entrepreneurship for 2017-2021, organizes the participation of the population of self-employed and unemployed in business, providing loans/microcredits to program participants, implementing or planning the implementation of business projects in rural communities and small towns. (National managing holding "Baiterek", 2021).

Lending mechanism: funds of the micro-lending program are provided to buyers of the regions in the form of a budget loan. The conditions of the "Enbek" program are as follows: program participants can be unemployed, persons belonging to certain categories of employed persons, determined by the Government of the Republic of Kazakhstan, members of large families with low income, people with disabilities with low income, young people and start-up entrepreneurs, agricultural cooperatives and their members (National managing holding "Baiterek", 2021).

The maximum loan/microcredit amount is:

- for the development of anchor cooperation - up to 8 thous. MONTHLY CALCULATION INDEX;
- in other areas - up to 2.5 thous. MONTHLY CALCULATION INDEX;
- loan term - up to 7 years;
- loan rate - no more than 6% per annum.

Today, within the framework of existing credit conditions, there are a number of programs aimed at developing types of agricultural and non-agricultural enterprises in the countryside.

Currently, government support covers almost the entire production cycle of major crops. In the field of crop production, measures of state support are being taken: the production of priority crops, the development of seeds, the purchase of fertilizers, the purchase of herbicides, and the cost of water supply services for agricultural producers.

The purpose of subsidies in the field of crop production is to increase production, increase yields and product quality, load the production capacity of enterprises for processing agricultural products and provide them with domestic raw materials.

4. Practical Analysis of Strategic Development of Meat Industry in Kazakhstan

4.1 Development of Meat Production in Kazakhstan

Cattle breeding in Kazakhstan, fairly speaking, is not considered as the most intense and widespread animal production in the country. As we can see it on the Figure X, Cattle is surpassed by sheep and goat production. The number of sheep and goats us unanimously the highest one with the increase observed in 2009-2019 from 17369,7 to 19155,7 thous. heads. Cattle breeding in the livestock industry. Then, the second most massive production is cattle with 7436,4 thous. heads in 2019, horses with 2852,3 thous. heads, camels with 216,4 thous. heads and poultry with 45 million heads.

year	Cattle	Sheep and Goats	Pork	Horses	Camels	Poultry, mln. heads
2009	6095,20	17369,70	1326,30	1438,70	155.5	32.7
2010	6175,30	17988,10	1344,00	1528,30	169.6	32.8
2011	5702,40	18091,90	1204,20	1607,40	173.2	32.9
2012	5690,00	17633,30	1031,60	1686,20	164.8	33.5
2013	5851,20	17560,60	922.3	1784,50	160.9	34.2
2014	6032,70	17914,60	884.7	1937,90	165.9	35
2015	6183,90	18015,50	887.6	2070,30	170.5	35.6
2016	6413,20	18184,20	834.2	2259,20	180.1	36.9
2017	6764,20	18329,00	815.1	2415,70	193.1	39.9
2018	7150,90	18699,10	798.7	2646,50	207.6	44.3
2019	7436,40	19155,70	813.3	2852,30	216.4	45

Table : Number of Cattle and Poultry by the end of 2019 year in Kazakhstan, thous.heads (Own based on: Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

Traditionally in Kazakhstan, local population is occupied by animal breeding. Kazakh national dishes are primarily made of meat. Nevertheless, the rate of population's urbanization had its toll on animal breeding in the country. Farmers started moving to cities and they do not want to be associated with agriculture anymore claiming that the real level of wages is relatively low. Apart from things said, the agrarian sector was hit the most after the fall of the USSR: essential economic relations with countries were simply destroyed and as a consequence, farmrs and countries had no demand for meat. However, the economic crisis of the 90s successfully surpassed and the government has started paying more attention to the development of the agrarian sector, including the entire animal production thus contributing to the sustainability of the meat production and demands of the local population for high-quality meat.

Let us consider developing the meat industry in Kazakhstan in dynamics over ten years from 2009 to 2019. Below are the statistics of gross livestock production.

Indicator	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR
Gross Production, bill.. thous.tenge	0.703	0.920	1.059	1.145	1.256	1.393	1.469	1.621	1.810	2.050	2.319	1.43
Growth,%	0	31	15	8.1	9.7	10.9	5.5	10.3	11.7	26.5	13.1	12.9
Absolute change, +/- (thous..tenge.)	0	217	139	86	111	137	76	152	189	240	269	146.9

Table 1: Gross Cattle Production in Kazakhstan in 2009-2019 years.
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

Table 1 shows that the growth rates of gross livestock production in Kazakhstan are increasing. The largest increase was observed in 2018 by 240 billons tenge Tenge. or by 26.5%, the lowest growth rate is present in 2015 at 5.5% or 76 bills. Tenge. Recall that after the USSR collapsed, all large meat processing plants were closed by that time and moved to small sausage stores. Currently, meat processing plants are limited to a capacity of 80-120 overhead cattle and 1000 overhead cattle per shift. The higher the scale of the meat-packing plant, the higher its cost, the higher the quality and sales market (the higher the selling price). In the USA, Australia, and Brazil, there are factories with a capacity of about 2000 overhead cattle per shift. In Europe - 300-400 overhead cattle per shift. The same leader in China's meat industry, Grand Pharm, has a slaughter capacity of 500 overhead cattle and 10,000 overhead small livestock. Many cheap sausages are imported into the country, in which there is no meat or very little. Such sausage will be in demand as long as there is demand. It depends on the purchasing power of the population.

The following table 2 shows the total meat consumption in Kazakhstan in 2009-2020.

Indicator	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total meat consumption, thous.tons	0.979	0.991	0.989	1.070	1.100	1.130	1.161	1.231	1.266	1.336	1.341	1.358
growth rate,%	0	1.2	-1	8.2	2.8	2.7	2.7	6	2.8	5.5	0.4	1.3
absolute change, +/- (thous.tons)	0	12	-2	81	30	30	31	70	35	70	5	17

Table 2: Total Meat Consumption and its Derivatives in Kazakhstan in 2009-2020 years
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

Our domestic manufacturers (especially conscientious ones) cannot always be competitive due to low cost and absence of duties. Removal of live cattle is the most profitable option today. The production of meat products in Kazakhstan is negatively affected by small-scale production. So, the main overhead - 61% is concentrated in personal subsidiary plots with poor reproduction, veterinary, fodder, not meeting the needs of animal husbandry, the basis. Small, fragmented producers are not funded and the villages continue to go back to the Middle Ages.

The rate of total meat consumption in Kazakhstan does not change dramatically. It should be noted that in 2011 there was a negative growth rate of -1% or -2 thous. Tons of meat and meat products. The highest growth rate is present in 2012 and is 8.2% or 81 thous. tons of meat and meat products. Let's look more closely at the per capita consumption of meat and meat products in Table 3.

Index	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	AAGR
Meat consumption per capita in Kazakhstan, kg.	59.8	61.2	60.2	64.2	65.1	65.9	66.7	69.7	70.7	73.6	72.9	72.9	66.9
growth,%	0	2.3	-2	6.6	1.4	1.2	1.2	4.5	1.4	4.1	-1	0	1.8
Absolute change, +/- (kg)	0	1.4	-1	4	0.9	0.8	0.8	3	1	2.9	-0.7	0	1.09
Meat consumption per capita in USA, kg.	124.8	122.5	122.1	121.3	120.2	115.8	114.2	112.3	108.21	105.3	100.3	98.6	133.8
growth,%	0	-1.8	-0.4	-0.1	-0.1	-0.4	-0.2	-0.2	-0.4	-0.3	-0.5	-0.2	-0.38
Absolute change, +/- (kg)	0	-2.3	-0.4	-0.8	-1.1	-4.4	-1.6	-1.9	-4.09	-2.91	-5	-1.7	-2.2

Table 3: Meat Consumption and its Derivatives per capita in Kazakstan per year, kg
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

As can be seen from the table, meat consumption in the United States exceeds consumption in Kazakhstan. It should be noted that the consumption of meat in Kazakhstan in the analyzed period increases by an average of 1.8% per year (1.09 kg.), While in the USA it decreases by an average of 0.38% per year (2.2 kg.))Consumption of meat and meat products per capita had negative growth rates in 2011 (-2% or -1 kg) and in 2019 (decrease by 1% or 0.7 kg.). In general, per capita, meat consumption is increasing in the analyzed period.

Let us also consider the average price of meat and meat products except CATTLE in the analyzed period - Table 4.

Index	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2020/2009, %
Average price of meat except cattle, thousand tenge.	0.870	0.875	0.950	0.985	1.005	1.110	1.190	1.205	1.270	1.323	1.401	1.501	72.5
growth rate,%	0	0.6	8.6	3.7	2	10.4	7.2	1.3	5.4	4.2	5.9	7.1	1003
absolute change, +/- (kg)	0	5	75	35	20	105	80	15	65	53	78	100	1800
Inflation in Kazakhstan%	6.4	7.9	7.4	6.1	4.9	7.5	13.5	8.2	7.2	5.4	5.43	6.37	-20
Growth rate adjusted for inflation,%	0	-7.3	1.2	-2.4	-2.9	2.9	-6.3	-6.9	-1.8	-1.2	0.47	0.73	-90

Table 4: Average Price of Meat, except cattle in Kazakhstan in 2009-2020 years, tenge
(Own based on: Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

It should be noted that the price of cattle meat increased in 2009-2020. by 72.5%, the average growth rate increased by 10 times, in kilograms by 18 times.

The average price of meat and meat products, except for CATTLE, has been steadily increasing during 2009-2020. from 870 tenge per kg to 1501 tenge per kg. The largest growth rates were observed in 2014 (10.4% or 105 tenges per kg). The lowest growth rate in 2010 or 0.6% (5 tenges per kg).

Thus, the production and consumption of meat in Kazakhstan are increasing. In addition, prices for meat and meat products are growing, creating the need to support the development of animal husbandry in Kazakhstan.

4.2 Cattle production's development

In general, the number of cattle in Kazakhstan is growing, but the growth rate is low. In particular, the growth rate for 2019 compared to 2009 was only 22% (from 6 175.3 thousand heads of cattle to 7436.4 thousand heads). Figure 3 below shows the number of cattle in Kazakhstan in thousands of heads.

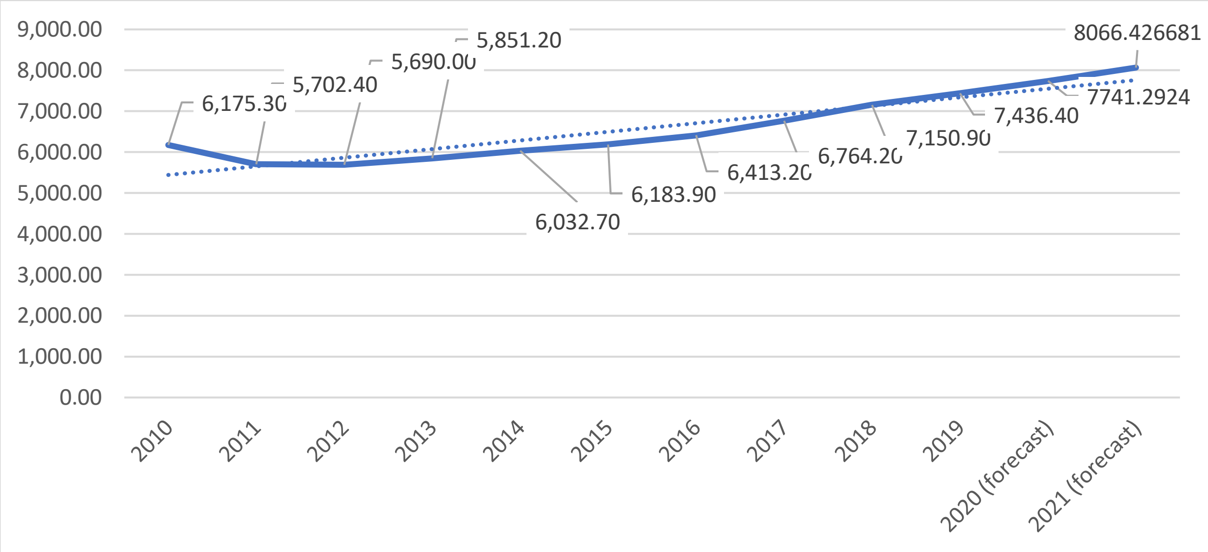


Figure 3: Number of Cattle in Kazakhstan, thousand heads of animal
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/))

It is planned to decrease the level of the number of cattle in 2020 and 2021 to 8066.42 thousand heads.

Let us further present the most numerous overhead cattle by regions of Kazakhstan - Table 5. The South Kazakhstan region occupies a leading position in terms of the number of cattle (in 2019 - 1052.9 thous.heads).

Region	2011	2012	2013	2014	2015	2016	2017	2018	2019
Almatinskaya	828.8	832.4	852.5	882.3	899.7	928.4	963.9	1004,60	1028,10
Western Kazakhstan	379.2	390.4	417.2	456.2	470.5	499.8	542.5	571.5	591.5
Karagandiyskaya	404.1	416.1	443.3	467.1	472.5	480.2	506.2	534	549.2
Kostanayskaya	376.4	394.4	402.5	415.5	420.7	427	440.7	455.2	462.4
South Kazakhstan	837.6	857.1	838.7	830.2	848	901.5	994.8	993.9	1052,9
Eastern Kazakhstan	733.6	740.2	769.3	802.1	839.4	868.2	895.4	952.7	1004,40
city. Nur-Sultan	1	1.1	1.1	0.7	0.6	0.5	0.5	0.3	0.3
city Almaty	0.6	0.7	6.6	3.5	2.7	2.9	3.1	3.2	2.5
city Shymkent	0	0	0	0	0	0	0	74.2	74.4

Table 5: Number of Cattle in Kazakh Region. thous. heads
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz//)

It is also worth mentioning the East Kazakhstan region (1004.4 thous.heads of cattle). Quite large volumes of cattle are observed in the Almaty region, in particular, 1028.1 thous.heads in 2019.

Further, we should mention the Zapadny Kazakhstan (591.5 thous.heads), Karaganda (549.2 thous.heads), Kostanay (462.4 thous.heads) regions. Growth rates in all regions are small over the study period. The production of separate species types of cattle livestock products in 2009-2019 increased from 1453 to 1975 thous.tons (Table 6).

Year	**CATTLE (actual weight), thous. tons**	**Absolute Change., +/**	**Percentage, %**	**Growth rate,%**
2009	1453	0	0	0
2010	1501	48.20	103.3	3.3
2011	1511	10.30	100.7	0.7
2012	1509	-2.10	99.8	-0.2
2013	1548	39.30	102.6	2.6
2014	1602	53.80	103.5	3.5
2015	1651	48.60	103	3
2016	1702	50.90	103.1	3.1
2017	1794	92.40	105.4	5.4
2018	1871	77.20	104.3	4.3
2019	1975	103.40	105.5	5.5

Table 6: Production of separate species of Cattle Industry, thous. tons
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/))

The highest growth rate was observed in 2019 + 5.5% or 103.4 thous.tons. The lowest growth rate was observed in 2012 -0.2% or -2.1 thous.tons of CATTLE meat in live weight. Per capita consumption of beef per year is shown in table 7 below.

Name	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bovine meat consumption per capital per year, kg	35.88	36.72	36.12	38.52	39.06	39.54	40.02	41.82	42.42	44.16	43.74	43.74
Share in total meat consumption,%	30.1	30.2	31.8	31.9	32.5	32.9	33.8	33.9	34.8	36.7	37.1	38
Growth rate, %	0	2.3	-2	6.6	1.4	1.2	1.2	4.4	1.4	4.1	-1	0
Absolute change, +/- (kg)	0	0.84	-0.6	2.4	0.54	0.48	0.48	1.8	0.6	1.74	-0.42	0

Table 7: Bovine Meat Consumption per capita per year, kg
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

Per capita beef consumption increases from 35.88 to 43.74 kg per year during 2009-2020. The largest growth rate is present in 2020 and is 6.6% or 2.4 kg. Negative growth rates are present in 2011 (-2%) and in 2019 (-1%). Table 8 below shows the prices for beef in Kazakhstan.

Type of Price	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Farmer' price	6606	612.0	600,6	672	684	712,2	713,4	705,6	762	900,6	945	1.1292
wholesale price	0.8808	0.816	0.8008	0.896	0.912	0.9496	0.9512	0.9408	1.016	1.2008	1.260	1.5056
Selling price	1.101	1.020	1.001	1.120	1.140	1.187	1.189	1.176	1.270	1.501	1.575	1.882

Table 8: Cattle compared to price (farmer's price, selling price), tenge per kg
(Own based on : Statistics of agriculture, forest, huning and acquaculture industries // https://stat.gov.kz/)

It can be seen from the data in the table that farm prices are the lowest and account for about 60% of the retail price. The wholesale price of beef is also lower than the retail price, by about 20%. The highest, and this is logical, is the retail price of beef. The import and export of cattle in Kazakhstan are presented in table 9 below.

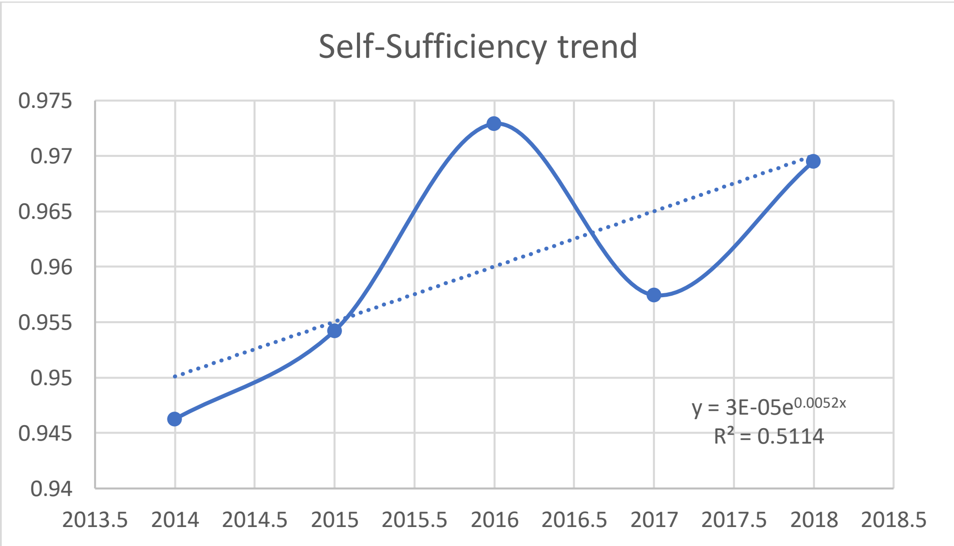
As you can see from the table, the import is significantly larger than export. For example, in 2019, the import is 85% more than export in tons and 148% in thous. US dollars. Thus, Kazakhstan cannot provide its own population with animal meat, and it is necessary to further develop the level of cattle production of cattle meat production in Kazakhstan.

4.3 Import and Export Analysis of Bovine Meat

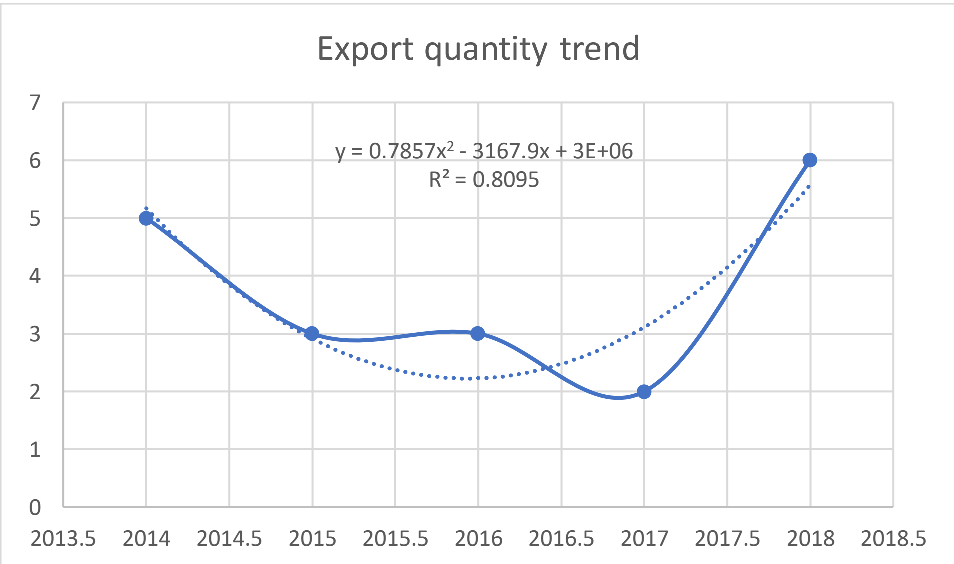
Nowadays, it is fair to assume that each country, to some extent, imports a particular amount of commodity regardless of its inner production. Therefore, it is wise to assume that Kazakhstan follows the same tendency of importing bovine meat as well as producing it internally with the intention of exporting it later on to its closest neighbours. In this part, the main focus will be on the self-sufficiency and net exports indexes that will help to shed light whether Kazakhstan is a primarily importing or exporting country and whether the quantity of meat is sufficient for the local consumption of the population.

	year		
	2017	2018	2019
Production, tonnes	450000	477000	480000
Import, tonnes	23958	21664	32426
Export, tonnes	3351	6113	7003
Internal consumption	470607	492551	505423
Self-Sufficiency, %	96%	97%	95%

Table 9: Self-Sufficiency index analysis of bovine meat in Kazakhstan
(Own based on : Food and Agriculture Organization of the United states // https://www.fao.org/faostat/en/#data/TP
and gov.kz https://www.gov.kz/memleket/entities/edu/activities/272?lang=ru



Source: own data processing



Source: own data processing

As it becomes obvious after taking a look at the Table 9, Kazakhstan experiences some problems with self-sufficiency in the country because the index of self-sufficiency is less than 100% when it comes to bovine meat. Presumably, it may be understood as a consequence of relatively high average prices in the country, thus making it equal to 1882 tenges per kilogram (Statistics of agriculture, forest, huning and acquaculture industries,2021).

Once the index of export increases, the self-sufficiency is bound to go up, and prices for meat in the country can start to decrease. However, the biggest issue here lies in the fact that a country producing 450000 tonnes of bovine meat does not expand its exporting frontier while having a lot neighbours that do tend to export bovine meat. As we can see it on the Table 10, countries that lie in the vicinity of Kazakhstan are large importers of bovine meat.

Let's analyze the export and import price of 1 kg of cattle meat(Table 9)

Indicator	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Price of 1 kg of cattle meat - import, tenge	856	810	790	880	889	910	925	915	965	1185	1220	1456
Price for 1 kg of cattle meat - export, tenge	880.8	816	800.8	896	912	949.6	951.2	940.8	1 016	1 200,8	1 260	1 505,6
Excess of expert price over import,%	2.9	0.74	1.4	1.8	2.6	4.4	2.8	2.81	5.3	1.3	3.2	3.41

Own based on : Food and Agriculture Organization of the United states // https://www.fao.org/faostat/en/#data/TP
and gov.kz https://www.gov.kz/memleket/entities/edu/activities/272?lang=ru

Table 9: Comparison of export and import prices for 1 kg of cattle meat in Kazakhstan (Created based on: Statistics of agriculture, forestry, hunting and fishing // https://stat.gov.kz/)

The data in the table show that there is an excess of the export price over the import one. In particular, in 2020, there was an excess of the price of 1 kg of export cattle meat over import in the amount of 3.41%, and in 2029 - 3.2%. This shows that it is more profitable for the population and traders to buy cattle meat and meat products from exporters, rather than from local farmers. The most exported destination for meat in 2019 was Russia with 3,6 thous. tons and Kyrgyzstan with 1,2 thous. tons.

The table below shows the import of meat from Kazakhstan.

Country	Bovine meat imported, tonnes				
	2015	2016	2017	2018	2019
Netherlands	4	0	0	24.049	0
Belarus	16.967	0	0	0	0
Netherlands	5	0	0	0	0
Russian Federation	135.076	200.490	486.584	1983,047	1733,885
Kuwait	0	270	2.135	1.287	0
Kyrgyzstan	0	32.220	40	3.366	16
Ukraine	0	20.000	0	2.239	0
Bahrain	0	0	250	21.810	0
United Arab Emirates	0	0	36.247	91.527	59.163
Georgia	0	0	0	0	0
Uzbekistan	0	0	0	1.091,230	2.230
China	0	0	0	0	3.211.412

Table 10: Bovine meat import quantity
(Own based on : UN Comtrade database https://comtrade.un.org/)

It can be seen that the largest import falls on the Russian Federation in 2015-2019. In 2016, meat imports to Russia increased by 48%, and in 2019 decreased by 13%. It is worth noting the growth of meat imports to China in 2019, which amounted to 3,211,412 tons. Also, a large number of imports are from the UAE; in 2019, imports to this country decreased by 36%.
The table below presents data on the export of meat to Kazakhstan for various countries.
The largest export of meat to Kazakhstan falls on Belarus, in particular, for 2015-2019. it increased six times, that is, by 20,598,061 tons. While the export of meat from Paraguay decreased in 2015-2019. by 88% or 2.867.828 tons. There was a decrease in the export of meat from Poland in the analyzed period by 1.661.751 tons or 58%.
The same is the case with Russia, the export of meat from Russia decreased by 82% or by 1.532.921 tons. Having said that and knowing that Kazakhstan barely exports bovine meat, we can assume that countries situated in Central Asia explore other importing options but not the Kazakh one. Evidently, it is quite a complicated question to resolve but one important assumption can clearly be made – Kazakhstan’s bovine meat is not quite attractive for its neighbors due either to relatively high prices or the very quality of meat itself.

Country	Bovine meat export, tonnes				
	2015	2016	2017	2018	2019
Australia	6.950	3.192	915	458	166
Belarus	4.112,683	1.576,223	7.437,758	5.725,692	24.710,744
France	503	0	0	0	0
Germany	474	0	0	0	0
Hungary	380	0	53.480	20.000	0
Mongolia	7.200	0	0	60.000	0
Netherlands	13	0	0	0	0

New Zealand	3.502	0	0	0	0
Paraguay	3.286,000	1247,750	1.147,990	2.156,038	418.172
Russian Federation	1.883.402	765.218	726.933	737.301	350.481
USA	10.398	10.529	28.198	24.685	31.819
Argentina	10.010	0	0	0	25.458
Brazil	160.376	54.017	28.008	0	0
Bulgaria	248.782	0	19.994	0	0
Denmark	37.983	0	34.768	0	1.589
Georgia	20.895	0	10.634	27.984	4.728
Lithuania	19.200	61.182	19.500	0	0
Poland	2.904,738	1.176,582	2.370,886	101.764	1.242.987
Ukraine	2.569,756	5.067,786	6.550,940	6.701,417	0
Italy	0	128.521	98.969	0	1.797
Pakistan	0	0	0	74.023	0

Table 11: Bovine meat export quantity

(Own based on UN Cometrade database https://comtrade.un.org/)

Therefore, it is possible to conclude that the export potential of the country is great – there are a lot of neighbors in the need of bovine meat imported to their countries but yet, if Kazakh's meat will remain not appreciated by those neighbours, all this export potential is likely to fade away as long as other channels of import are being adopted by the nearest neighbours

For example take a company “Ansar Asia "

The company produces meat food products, sausages, dumplings, carries out wholesale trade in meat, etc.

The team is based on people with more than fifteen years of experience in the market. In addition, the founders of the company are still actively involved in its commercial and procurement activities.

Thanks to the experience and connections with a large number of foreign suppliers, the company is ready to provide a minimum price and enter into long-term contracts with a stable price and contracts with a flexible price, which may change depending on market conditions.

The company does not change the agreed price and maintains the delivery time and terms of the transaction.

The experience and guarantees of production are confirmed by various certificates. The company cooperates only with those manufacturers that are able to withstand competition from large retail chains. On request, the company is ready to produce almost any product. In addition, you can place an order directly from a raw material manufacturer abroad.

Together with a large number of producers of raw materials and finished products, the company is able to find any supplier and, in the event of force majeure, ensure the stability of supplies.

4.4 SWOT-analysis of Meat Production in Kazakhstan

Of course, the further development of the meat industry in Kazakhstan depends on many factors: a high-quality food base, the genetic potential of animals, the introduction of modern technologies and innovations. One of the most important tasks is to attract funds to the industry, its comprehensive financial support. First of all, you need not only to take on special control over the safety of livestock but also to remember that the basis of any development is the creation of added value, and to actively work on the problem of Kazakhstan's entry with finished products to foreign markets (Implementation of the Address of the President of the Republic of Kazakhstan in AGRICULTURE, 2019).

We need a government program to support the deep processing of animal raw materials. Its implementation will allow meat producers to increase profitability and purchase livestock at higher prices from domestic farmers. Nowadays, there are 175 meat-processing industries that specialize on dealing with “red” meat (no poultry consistency). Overall volume of all meat processes on those industries is 248 thous.tons of meat.

Today several trends are on the agenda for the development of the meat industry in Kazakhstan. This is the extension of the moratorium on the export of live cattle, and a serious threat against this background, to become dependent on the main buyers of local cattle - Uzbekistan and China, where large-scale meat projects with state participation are being implemented, and the low workload of factories in Kazakhstan puts under the blow, in principle, the development of the entire meat industry. The situation should be rescued by coordinated actions of all market participants, common interests, and meat product owners' business skills.

Due to lobbying and a global pandemic that caused an economic crisis on the planet, Kazakhstan was also losing its position in the meat market in 2020. Within the framework of the AGRICULTURE development program, the Ministry of Agriculture has developed a processing map for the agro-industrial complex. Three years ago, the share of meat processing was 12%, meat processing plants were only 38% loaded. Mechanisms for increasing processing volumes were proposed: the modernization of existing plants and the construction of new ones, an increase in the availability of raw materials through the supply of rural cooperatives, and replenishment of working capital through preferential loans. But then, for some reason, the emphasis was not on processing but on the export of raw materials. At the end of 2019, the export of live cattle from Kazakhstan increased to 159 thousand overhead, although before that, there were only 39 thousand. Most of all export falls on Uzbekistan - 121.5 thous.heads cattle. And there are almost twice as many small livestock - 263 thousand overhead. That is why a complete ban was introduced on the export of live cattle from Kazakhstan, which was in effect until November 1, 2020 (Source: Kazakhstan Today).

SWOT-analysis of enterprises of the meat industry in Kazakhstan is presented in table 10 below.

One of the priorities for market participants today is the extension of the moratorium on the export of livestock. In 2018, meat prices already increased by 24% due to the fact that Uzbek farmers are actively buying livestock, and the workload on processing plants fell by 20%.

Strengths: Is an element of vertical integration of a large agro-industrial complex Corporate system management Financial stability Strong senior management team	**Opportunities:** Entering new markets or market segments Scaling up production Expansion of the range of products Adding related products State support for the industry The emergence of additional sources of investment
Weaknesses: Dependence on external suppliers of raw materials Decrease in liquidity growth rates Slowdown in growth rates sales	**Threats**: The possibility of the emergence of new competitors Market growth slowdown Increasing competitive pressure Appearance of substitute goods on the market

Table 11: SWOT-analysis of meat industries in Kazakhstan

In the next six months, it is planned to introduce a new ban on the export of cattle, allowing the export of fattened livestock and sheep. The government acts in this way to prevent the rise in prices for meat and meat products. But there is no guarantee that unscrupulous exporters will not be able to take advantage of this. From August 1, 2020, farmers began to receive additional subsidies for the delivery of livestock to meat processing plants in Kazakhstan - 200 tenges with a kilogram of delivered meat is a good allowance.

Among the Central Asian countries, Uzbekistan has the greatest progress in this area. Everything there is checked correctly by the state program AGRICULTURE. Uzbekistan starts supplying Kazakhstan with a bone meal for feeding (foodindustry.kz).

In general, the agro-industrial complex is well subsidized and well-financed. The question is different - how correctly and efficiently all these funds are directed and spent. This can be discussed for a long time. But there is the main principle of the market – over the year. The current circumstances in our country are such that it is more expensive to export live cattle than to sell it in the processed form on the foreign market. First, farmers get money from the sale of livestock outside the country immediately, and they do not have to wait. Secondly, the markets for meat products are negligible for our producers. We practically do not sell processed meat on export. Here it is necessary to provide real assistance from the state, which would help to find new sales markets. Presumably, there are quite a lot of perspectives for exporting meat to Russia and especially to China, where the quality of meat produced in Kazakhstan more than enough for satisfying the needs of peaky-eaters from both countries for whom the quality of food produced in Kazakhstan more than satisfying. Moreover, many economic ties between countries were practically destroyed due to the coronavirus crisis, and we could fill these niches.

It is known that China is building its own meat processing infrastructure on the border with Kazakhstan. On the border of China with Kazakhstan, a platform for receiving livestock has been organized, and a meat processing plant has been built (Buyanov, 2020). If the export of live cattle begins, and Chinese production is launched, this channel will lead to a constant leakage of live cattle from Kazakhstan, and domestic livestock will turn into a raw material appendage of meat processing in China. Naturally, the country will not get any benefit from this. The alternative is to supply China with meat, not live cattle. This will be much more profitable for farmers, and for processors. Currently, there are 1 384 688 968 inhabitants living in Mainland China. Each one of them consumes on average the amount of 68,5 kg of meat per year. The total volume of the meat market in China is roughly 100 mil. tons of meat. The most consumed type of meat is pork. Generally, Chinese population consume pork at the level of 57 mlns tons. Then, the list continues with poultry, bovine and lamb meet. It strikes as obvious that perspectives for export are immense. Over time, the Chinese side, as the main consumer, will begin to dictate their terms and set their prices, capturing the profitability of our livestock breeding. And our farmers will simply work for them. This dependence can be cited as an example in other sectors of the economy. At the same time, it is known that foreign investors are actively involved in launching at least five meat enterprises in Kazakhstan.

4.5 Analysis of Strategies of Development in Meat Production in Kazakhstan

The meat industry's strategic goal is to ensure a safe and sustainable supply of healthy and quality food to the population. The guarantee of achieving the strategic goal is the stability of internal sources of food and raw materials and the availability of the necessary reserve funds.

An assortment policy focused on the market for different social groups of the population in terms of income cannot be recognized as an element of a marketing strategy. The largest share in the product assortment is made up of sausages and sausages. Every year the assortment is renewed from 10 to 15 items, which is an average rate of the novelty of 7.5%.

Today, the enterprises of the meat industry in Kazakhstan adhere to certain marketing strategies. In particular:

- work with the target market;
- pricing;
- work in the Internet environment;
- a grocery store that focuses on business.

However, during the implementation, we identified shortcomings in determining the production volumes of individual products of the assortment, taking into account consumers' needs and the economic benefits for the business. Separate positions in the group of semi-finished meat products are "unpromising" with increased production volumes while maintaining the current level of costs. It is economically inexpedient to have to exclude smoked and raw sausages from the assortment.

Their positioning determines today's strategic goals among enterprises that determine the trends and indicators of the agro-industry development and provide more than 70% of production. This should be an incentive to take appropriate action:

- ensuring strategic goals (production index in comparable prices) not lower than in the program passport;
- Search for raw materials within the target program;

- activating the marketing strategy of positioning products as high-quality, produced on the main raw materials only of Kazakhstan origin, the company itself covers not only markets and potential investors, but also other territories (Industry of Kazakhstan: https://365-tv.ru/index.php/analitika / Kazakhstan).

A feature of meat processing enterprises is their weak technical equipment (forbes.kz, 2020). The equipment on many of them is morally and technically outdated, and the technological cycle is not closed. Meanwhile, the modern market makes very high demands on product quality. The production of domestic technological equipment for meat processing is a serious problem. The main competitive advantage of imported machines is the variety of technological operations they cover, modern materials and design, high-quality workmanship (Ordabasy kus: ordabasy-kus.kz/).

4.6 Strategic Problems of Meat Industry in Kazakhstan

The strategic problems of the meat processing industry include:

- emphasis on short-term results to the detriment of medium-term and long-term results, lack of a strategic approach to the activities of the enterprise;

- the absence of complex medium-term and long-term plans at enterprises and, as a consequence, the impossibility of preparing production and personnel for the renewal of products, a decrease in the level of coordination of individual subsystems of the enterprise;

- wide application of the planning principle "from the achieved level";

- lack of knowledge about the current and projected state of the market, the need to increase financial costs, resources, and efforts of the management to orient the market, search for solvent buyers and suppliers of cheap raw materials and materials;

- Lack of readiness of the enterprise to changes in demand, the appearance on the market of high-tech and competitive quality products;

- decline in personnel qualifications, aging of fixed assets and technologies, the decline in the technological discipline;

- decrease in labor motivation of workers, the prestige of workers in engineering and technical professions;
- a high degree of divergence of the operational interests of the management and the team with the growth of the leadership's power, the predominance of the personal interests of managers, the confrontation between the management and the team.

There is a growing discrepancy between industrial production structure (from the point of view of enterprises), the structure of demand for products, and the structure of the supply of factors and technologies of industrial production.

Thus, meat producers are currently focused on short-term goals (mainly to maximize profitability), their organizational structure is relatively stable, and economies of scale and efficiently use of production factors are seen as the main factors of competitiveness.

5. Strategic Vectors of Meat Enterprises‘ Development

5.1 Ways of Improving Government’s Regulation over Meat Industry

According to experts, every year, more than 100 countries of the world import a significant amount of various types of sub-quarantine products, and the volume of products imported into the country increases every year. The probability of penetration and spread of quarantine objects on the Republic of Kazakhstan's territory is quite high. Besides, sub-quarantine products from China, Uzbekistan, Kyrgyzstan, Iran, and the Republics of Transcaucasia pose a serious danger. Further, a scheme of actions for the area of the meat industry's strategic management is made (Eurasian integration, 2021).

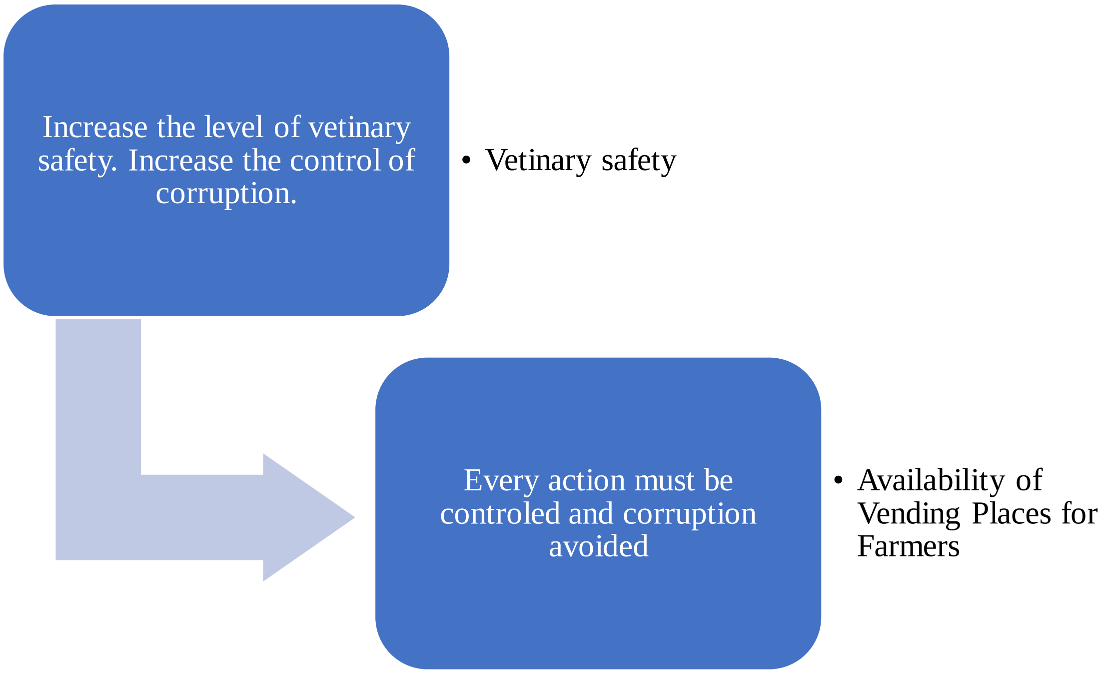


Figure 5:Vectors of Strategic Management in Meat Production
(Own forecast)

Quarantine installations are often found not at the border but the points of arrival of goods. Through a certain part of the Republic's territory, from the border to the final destination, the contaminated cargo moves uncontrollably, which can lead to the resettlement of objects in this territory. This is because not all checkpoints have specialized quarantine laboratories. There may be a lack of laboratory testing of imported quarantine products and an insufficient number of qualified quarantine inspectors.

5.2 Application of International Techniques in Meat Production

The main objectives of the agricultural policy of developed countries are to provide consumers with clean food, protect the domestic market, stabilize agricultural activities, reduce imports of goods, produce competitive products, implement a livestock development program, restore a mechanized park, switch to new technologies, ensure that products comply with international standards (technical regulations), sanitary and phytosanitary measures, the creation of principles of concessional lending, etc. (Review: World Beef Production and Consumption, 2021).

In Sweden, the agricultural rationalization law aims to support agricultural producers' competitiveness and limit the import of food raw materials through quotas and duties. To stimulate agricultural production, the state proceeds from the fact that farmers' income is not lower than the wages of skilled workers on average in the industry. Besides, the state is also pursuing an active pricing policy, supporting prices in the domestic market, allocating subsidies to cover losses in the event of a sharp rise in inflation, and funding research. In accordance with the legislation, the production of milk, butter is subsidized, loans are issued for the purchase of agricultural equipment, fertilizers, 30-40% of tariffs for electricity, transport, fuel, and lubricants, and the export of agricultural products is subsidized.

In Israel, land relations are governed by the Land Ownership Law. An agricultural surplus in the country was nearly eradicated as farms had production and water consumption quotas for each crop, which helped stabilize prices. Israel's Ministry of Agriculture oversees the country's agricultural sector, including maintaining plant and animal health standards, agricultural planning, research, and commercialization. In general, the state has a significant impact on the agricultural industry. That is why Israel is one of the countries with the most developed agricultural sector (Ordabasy kus: URL: http: //ordabasy-kus.kz/).

Based on the studied foreign experience, we have formulated recommendations for the Kazakhstan meat industry. – Figure 6.

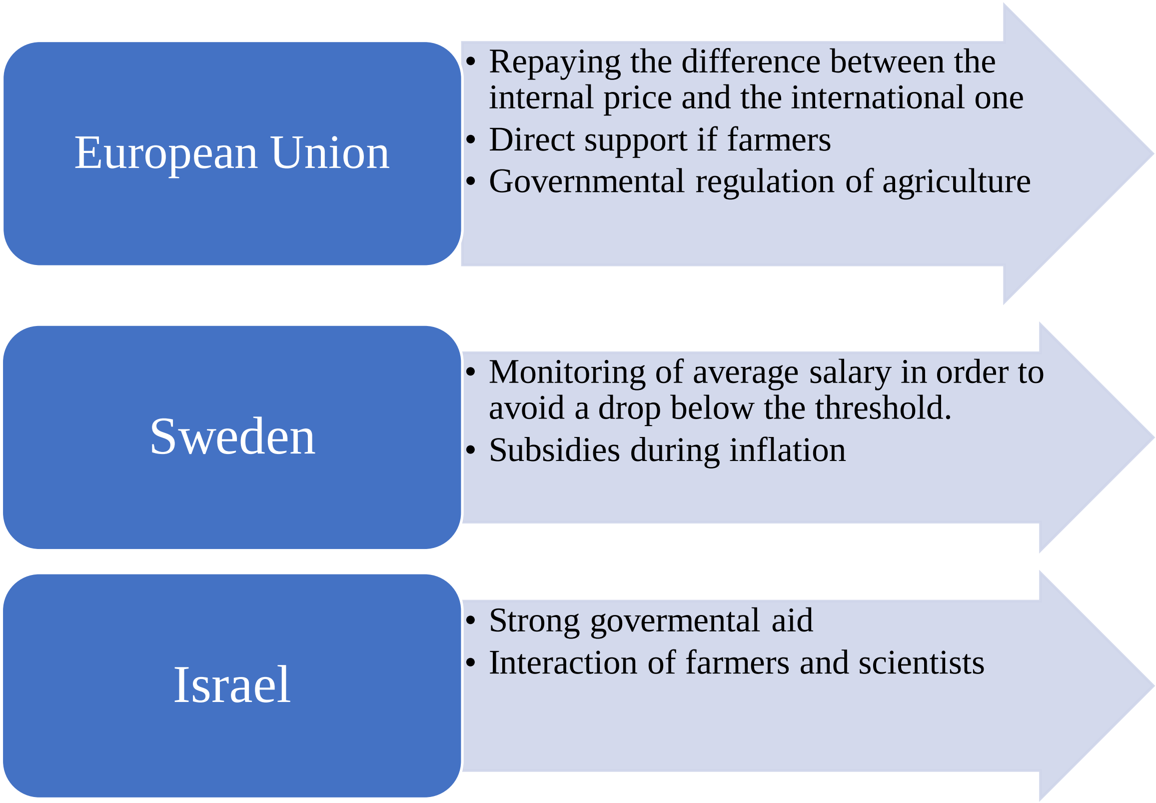


Figure 6: Application of International Experience for Kazakh Meat Production Development
(Own forecast)

The secret to the success of Israeli agriculture lies in the close collaboration between farmers and government-funded scientists in the development and implementation of improved methods in all sectors of agriculture, as well as in the use of new technologies, modern irrigation technologies, and modern agricultural equipment.

I believe that on the basis of the formulated recommendations for the development of the meat industry in Kazakhstan, it is possible to formulate a forecast for the production of CATTLE meat for 2020-2026. - Figure 7.

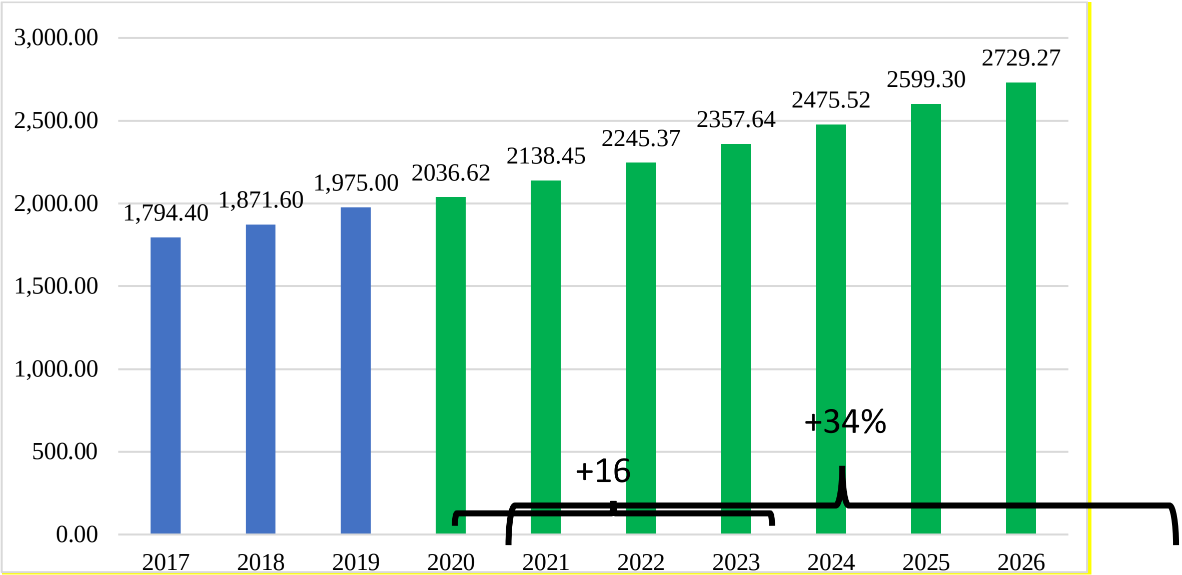


Figure 7: Forecast for 2020-2026 y. cattle production in thous. tons
(own forecast)

In accordance with the formulated forecast in 2020-2023. there will be an increase in the production of CATTLE meat by 16% from 2036.62 to 2357.64 thous. tons, and in 2020-2026. up 34% to 2729.27 thous.tons.

In my opinion, the competitive functioning of the meat market in Kazakhstan requires, firstly, a sufficient volume of high-quality raw materials for meat processing enterprises; secondly, the planned development of the infrastructure of the meat products market; third, the intensification of the activity of meat processing enterprises for the production of meat and meat products, an increase in the use of production capacities by enterprises; fourthly, conducting comprehensive marketing research of producers and consumers of meat products. And finally, fifthly, every economic entity present in the meat products market constantly conducts an economic analysis of its business and competitive environment.

6. Conclusion

Let’s conclude what we’ve researched so far.

In the theoretical part, strategic management was considered with an emphasis on competitive advantages. The strategy is a look at the long-term future to determine what the company wants to achieve and develop a plan for how to achieve it. The goal of a strategy is to define and communicate a picture of the enterprise through a system of core goals and policies. In order to form competitive advantages for meat and meat products producers, we can recommend the Indicator "safety", that is, to confirm the quality of products with documentation on mandatory certification, to emphasize the usefulness and safety of these products.

In the analytical part, an analysis of animal husbandry and the meat industry for 10 years in Kazakhstan was carried out. The rate of total meat consumption in Kazakhstan does not change dramatically. It should be noted that in 2011 there was a negative growth rate of -1% or -2 thous. tons of meat and meat products. The highest growth rate is present in 2012 and is 8.2% or 81 thous.tons of meat and meat products. Consumption of meat and meat products per capita had negative growth rates in 2011 (-2% or -1 kg) and in 2019 (decrease by 1% or 0.7 kg.). In general, per capita, meat consumption is increasing in the analyzed period. In general, the number of cattle in Kazakhstan is growing, but the growth rate is low. In particular, the growth rate for 2019 compared to 2009 was only 22%. Import is significantly more export, for example, in 2019, the import is 85% more in tons and 148% in thous. US dollars. Thus, Kazakhstan cannot provide its own population with CATTLE meat, and it is necessary to develop the production of CATTLE meat and meat products.

The recommendation part contains recommendations for the strategic development of the meat industry. In the field of state support for the meat industry in Kazakhstan, it is necessary to improve the approaches and methods of work to improve the genetic potential of CATTLE. In this regard, in addition to reproductive animals, an indexed assessment is required to determine the reproductive value of animals, molecular genetic examination, which makes it possible to provide more accurate information about the reproductive animal's origin. Within the framework of state financial support for farmers and farms, it is necessary to strengthen control of farmers and government officials. Subsidies should focus on priority areas related to the country's food security, and where, without government support, it would be difficult to make a greater difference in ensuring the stability of the subsidy rules.

In our opinion, the competitive functioning of the meat market in Kazakhstan requires, firstly, a sufficient volume of high-quality raw materials for meat processing enterprises; secondly, the planned development of the infrastructure of the meat products market; third, the intensification of the activity of meat processing enterprises for the production of meat and meat products, an increase in the use of production capacities by enterprises; fourthly, conducting comprehensive marketing research of producers and consumers of meat products. And finally, fifthly, every economic entity present in the meat products market constantly conducts an economic analysis of its business and competitive environment.

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SWOT – strengths, weakenesses, opportunities and threats analysis