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## PROBLEMS OF DAIRY PRODUCTION IN KAZAKHSTAN

*The article discusses the problems of the milk and dairy products market in the Republic of Kazakhstan and in the regional context. The purpose of the study is the current state of milk and dairy production, on the basis of which the tasks are: monitoring the number of dairy cows by category of farms, analysis of milk and dairy production in the regions of the Republic of Kazakhstan, analysis of milk and dairy production, analysis of imports of milk and dairy products from the EAEU countries.*

*In different years, scientists in Kazakhstan have been conducting research on this issue, but the problem remains open. In the process of writing the article, such research methods as observation, as well as comparative and other methods of cognition are used. The information base was statistical data on the production of milk and dairy products in the Republic of Kazakhstan, as well as the work of Kazakhstani scientists. The article analyzes the number of dairy cows, analyzes the production of milk and dairy products, analyzes the import of dairy products from the EAEU countries. The solution of these issues will contribute to the development of the dairy production industry in Kazakhstan*

**Keywords:** *milk, dairy, production, increase, dairy products, region, farm, agricultural, enterprise, process.*

**Кілт сөздер:** *сүт, кілегей, өндіріс, ұлғайту, сүт өнімдері, аймақ, ферма, ауыл шаруашылығы, кәсіпорын, процесс.*

**Ключевые слова:** *молоко, сливки, производство, прирост, молочные продукты, регион, ферма, сельское хозяйство, предприятие, процесс*

**Introduction.** The development of agricultural and processing enterprises is important in ensuring the food security of any state. In this regard, there is no doubt about the timely reorientation of the entire agro-industrial complex of the state to solve the tasks of ensuring the processing of raw materials and entering world markets with competitive and high-quality finished products [1]. The dairy industry in the Republic of Kazakhstan, as in many developed countries, is the leading branch of the food industry [2]. Due to the fact that this type of industrial production is one of the most expensive areas of animal husbandry in the country, its accelerated development is hindered by the low economic efficiency of raw materials production. The production of milk and dairy products is the most expensive, but very important type of production in agriculture, responsible for the food security of the whole country. It is difficult to overestimate the need of the population to consume milk and dairy products, since milk is a very important food for both the adult generation and children. But today, Kazakhstani producers of milk and dairy products

face a number of problems related to the annual increase in prices for feed and fuels and lubricants, the shortage of raw materials for the production of fermented dairy products, new technologies and equipment. In his speech, the President of the country noted that it is necessary to reduce the number of imports of food products and increase exports of manufactured products. Therefore, it is necessary to search for effective solutions for the development of small enterprises, solving problems of production and cooperation, as well as the application of modern strategies for the development of enterprises, which makes this study relevant. [3].

The purpose of the study is to study the current state of milk production and dairy products, as well as to identify problems hindering the development of the dairy cattle industry, on the basis of which the tasks are set:

- monitoring of the number of dairy cows by farm categories;
- analysis of milk production and dairy products in the regions of the Republic of Kazakhstan;
- analysis of the production of milk and dairy

products by categories of farms, analysis of imports of milk and dairy products from the EAEU countries.

The object of the study is dairy producers, namely the categories of farms producing milk and dairy products represented in the form of agricultural enterprises, peasant and farms and the population producing milk and dairy products. The subject of the study is the activity of categories of farms aimed at the production of milk and dairy products.

**Literature review.** The study and analysis of the development of milk production and dairy products in the Republic of Kazakhstan revealed a number of problems hindering its further development. In accordance with the tasks set, the following research methods were used, such as observation, description, analysis and synthesis, the method of monographic research, as well as comparative and other methods of cognition. The use of the monographic research method made it possible to substantiate and generalize the regional features of the placement of dairy processing enterprises, confirming the close relationship between the development of the dairy industry and the raw material base, as well as to identify the competitive advantages of processing enterprises of the republic.

The information base of the study is statistical data on the production of milk and dairy products in the Republic of Kazakhstan, as well as the work of Kazakhstani scientists etc., materials of scientific conferences, normative and reference provisions. In the works of A.S. Belgibayeva and B.K. Nasyrkhanova, the problem of milk and dairy

production at the regional level is considered, since the Akmola region is one of the leaders in the production of processed milk and dairy products, in their opinion, the main problem of low milk and dairy production is low technological preparation and lack of innovation among producers, the high cost of feed and the constant increase in prices for fuels and lubricants [4]. The problem of inefficient production of dairy products and low profitability also connects producers from Russia, according to Tarabukina T.V., the solution to this problem lies in the interaction of specialized industries and the desire of economic entities to create a transaction system that ensures maximum cost savings and profit margins [5]. Also, in the studies of scientists from Serbia Vedran Tomic, Dragan Milic, Dejan Yankovic, it was noted that the efficiency of milk production and dairy products is achieved due to the availability of technologies necessary for the production and processing of milk and dairy products, as well as the development of crop production to provide a lump base [6].

**Main part of the research.** The analysis of the current state of the dairy industry in Kazakhstan shows that the main problem is still the underdevelopment of the raw material base. One of the main factors influencing the change in the production of dairy products is the number of cows for dairy purposes. In 2020, the share of cows in the country was 51.07% of the total number of cattle, or 4,008,294 thousand units.

Table 1

**Cattle population and dairy production by farm categories in the Republic of Kazakhstan 2018-2020\***

Category of farms	Cattle, thousand units.	Share of cows		Milk produced		Average milk yield, kg
		Thousand units	proportion, %	Tons	proportion, %	
1	2	3	4	5	6	7
2018						
Agricultural enterprises	712 818	275 343	38,62	381 297,5	6,75	4543
Peasant farms	2 409 756	1 312 032	54,44	1 106 061,6	19,60	1847
Households	4 028 346	1 989 160	49,37	4 154 923,9	73,60	2414
All categories	7 150 920	3 576 535	50,01	5 642 283,0	100,00	2347
2019						
Agricultural enterprises	717 896	280 667	39,09	411 151,7	7,06	4660
Peasant farms	2 624 252	1 444 508	55,04	1 168 283,8	20,07	1829
Households	4 094 259	2 044 590	49,93	4 240 669,5	72,86	2419
All categories	7 436 407	3 769 765	50,69	5 820 105,0	100,00	2347

	1	2	3	4	5	6	7
	2020						
Agricultural enterprises	754 704	287 066	38,03	463 029,1	7,71	4864	
Peasant farms	2 861 480	1 601 543	55,96	1 230 295,2	20,49	1835	
Households	4 232 358	2 119 685	50,08	4 310 861,8	71,79	2424	
All categories	7 848 542	4 008 294	51,07	6 004 186,1	100,00	2360	

\* Calculated by the authors based on sources [7]

Monitoring of the number of cattle showed that there is a tendency to reduce the share of cows in the total number of cattle in agricultural enterprises of the Republic of Kazakhstan from 38.62% in 2018 to 38.03% in 2020. At the same time, there is an increase in the share of cows in peasant farms from 54.44% (1,312,032 units) in 2018 to 55.96% (1,601,543 units) in 2020 and in household farms from 49.37% (1,989,160 units) in 2018 to 50.08% (2,119,685 units) in 2020. To further develop the production of dairy raw materials, it is necessary to increase the share of dairy cows in the total number of cattle and increase the average milk yield per unit. Milk production in the Republic of Kazakhstan in all categories of farms in 2020 amounted to 6004186.1 tons, while the share of households in the total volume of milk production is 71.79 %, agricultural enterprises-7.71 %, peasant farms-20.49 %. In comparison with the data for 2018, 2019 and 2020, there is a positive trend in milk production in agricultural enterprises and farms. In 2018, agricultural enterprises produced milk by 6.75% of the total amount of milk produced (381297.5 tons), and peasant farms by 19.6% (1106061.6 tons), in 2019, agricultural enterprises increased the production rate from 6.75% to 7.06% (411,151.7 tons of milk), and peasant farms from 19.6% to 20.07% (1168,283. 8 tons of milk). The average milk yield per 1 dairy cow in the Republic

of Kazakhstan in 2020 amounted to 2,360 tons. At agricultural enterprises, there is a steady trend to increase this indicator from 4543 tons in 2018 to 4864 tons in 2020. In peasant and farm farms, the average milk yield for the entire analyzed period is lower than the average for the Republic of Kazakhstan, that is, they lag behind agricultural enterprises and households in milk yield. Large-scale commercial production has significant advantages in that it is able to offer products produced at lower prices, better quality and a wider range. It was found that with an increase in the concentration of cows by 100 units, their average productivity increases by 5.2%. Direct labor costs and the cost of a ton of milk are reduced by 12.6% and 5.5%, respectively. In modern conditions, a promising direction for the development of the agro-industrial complex of the country is the processing of agricultural products. However, despite positive trends and measures of state support, the share of processing of agricultural products in the total volume of production in the country remains low. Kazakhstanis consume 2 times less dairy products than Europeans. experts see both negative and positive trends in this situation. The dairy market has a lot to grow. The problem lies in the high cost of dairy products produced in Kazakhstan, Kazakh producers need state support to remain competitive with imported products.

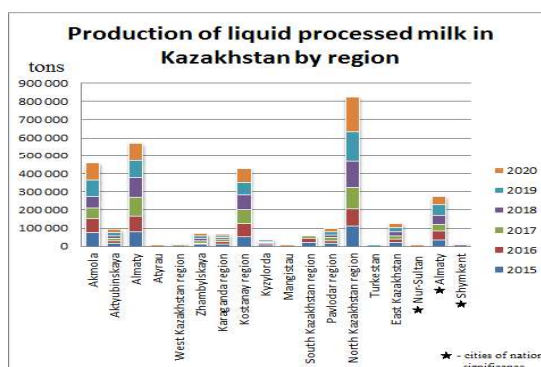


Figure 1. Production of liquid processed milk in Kazakhstan by region  
 \* Compiled according to the Bureau of National Statistics [7]

From figure 1 above, it can be seen that in 2020, 598,528 thousand tons of liquid processed milk and cream were produced, which is 6.22% more than in 2019. Since 2016, there has been an annual increase in output, in 2018, the indicator rose significantly by 10.22%. Low material and technical base, nuances in obtaining subsidies and joining the customs Union have greatly affected the dairy producers of the Republic of Kazakhstan. Almost 32% of all liquid processed milk and cream produced is accounted for in the North Kazakhstan

region: 189,101 thousand tons. In addition, almost a third of the production volume is accounted for in Almaty (98,885 thousand tons) and Akmola (94,928 thousand tons) regions. In total, 65.94% of the total production of liquid processed milk and cream is produced in northern Kazakhstan, or rather in the Akmola, North Kazakhstan and Kostanay regions. The Kazakhstan market is filled with food products from the CU and WTO countries, and there is a wide range of imported products on the shelves [8].

Table 3

**Import of milk, cream and condensed milk from the EAEU countries**

Milk and cream, condensed and non-condensed	2018		2019		2020		2019/2018 (+/-)		2020/2019 (+/-)	
	tons	Thousand US dollars	tons	Thousand US dollars	tons	Thousand US dollars	By quantity	Thousand US dollars	By quantity	Thousand US dollars
Belarus	23 133,0	39 682,4	23 714,2	40 891,9	23 935,6	44 033,6	102,5	121,2	119,4	131,7
Kyrgyzstan	13 032,7	6 940,8	13 259,9	7 111,8	14 371,0	10 672,6	124,8	109,2	100,9	107,7
Russia	13 667,0	19 318,8	13 872,1	19 685,3	22 393,8	34 461,0	78,8	85,4	108,4	150,1
Total	49 832,7	65 941,9	50 846,3	67 689,0	60 700,4	89 167,3	99,0	106,8	161,4	175,1

\* Calculated by the authors based on sources [9]

Table 3 shows how the import of milk, cream and condensed milk from the EAEU countries is growing every year. With the annual increase in domestic production of milk and dairy products in the Republic of Kazakhstan, the import of dairy products also increases. Most of the products are imported from Belarus, at the same time, the import of products from Russia is significantly increasing. From this table, we can conclude that the population's demand for dairy products is growing, competition is growing, the range of dairy products is expanding, respectively, Kazakh producers have the opportunity to occupy a certain niche in the market for the production of milk, cream and condensed milk. To do this, Kazakhstan's dairy producers need support from the state, which will contribute to the further development of the dairy industry, gradual import substitution and an increase in the

share of exports. At the same time, the profitability of dairy production is low and sensitive to changes in the economy and the impact of crises. In the period from 2015 to 2020, dairy producers suffered losses associated with the fall of the ruble in 2014, which led to an influx of imports of cheaper goods, including dairy products, and an increase in prices in 2015 for fuel and energy. And also in 2020 due to the global crisis as a result of the global pandemic caused by Covid-19, which caused a decline in production and interruptions in the supply of raw materials. The table below shows data on the profitability of dairy production over the past 5 years. In it, you can see in the context of the regions how unprofitable the production of milk and dairy products was in the areas specifically specializing in the production of dairy products.

Table 4

**Profitability (unprofitability) of production\***

Region	2015	2016	2017	2018	2019	2020	2020/2019	2020/2015
1	2	3	4	5	6	7	8	9
Republic of Kazakhstan	-3,6	5,2	3,5	8,8	12,0	8,6	71,67	-238,89
Akmola region	-9,2	4,0	5,4	-3,5	5,2	4,9	94,23	-53,26
Aktobe region	-1,2	3,0	2,1	11,2	4,7	2,1	44,68	-175,00
Almaty region	-6,0	-14,5	0,6	-1,2	2,1	3,9	185,71	-65,00

1	2	3	4	5	6	7	8	9
Atyrau region	-2,8	3,3	5,8	15,4	20,8	5,0	24,04	-178,57
West Kazakhstan region	16,4	21,4	19,3	30,6	29,3	1,6	5,46	9,76
Zhambyl region	2,4	1,4	3,9	5,1	3,2	1,5	46,88	62,50
Karaganda region	-1,4	5,2	4,8	5,1	4,2	5,4	128,57	-385,71
Kostanay region	-2,3	2,7	3,4	3,4	4,0	4,8	120,00	-208,70
Kyzylorda region	5,4	8,3	2,5	3,6	9,6	12,5	130,21	231,48
Mangystau region	-9,7	-24,9	6,4	8,1	3,6	4,8	133,33	-49,48
South Kazakhstan region	2,9	1,6	3,6	-	-	-	-	-
Pavlodar region	0,6	1,4	8,3	5,6	7,2	10,7	148,61	1783,33
North Kazakhstan region	-6,9	-4,2	4,8	1,9	6,5	6,9	106,15	-100,00
Turkestan region	-	-	-	8,2	11,9	8,2	68,91	-
East Kazakhstan region	0,0	7,1	8,1	7,6	8,1	9,0	111,11	-
Nursultan	3,6	7,6	4,8	9,2	7,1	6,6	92,96	183,33
Almaty	-13,3	10,8	-0,7	9,6	18,0	13,4	74,44	-100,75
Shymkent	-	-	-	2,4	4,8	6,2	129,17	-

\* Calculated by the authors based on sources [10]

As can be seen from Table 4, producers of Akmola, Kostanay and North Kazakhstan regions are experiencing significant difficulties and incur losses at the time of changes in the economy and

rising prices for both fuel and feed. Accordingly, the coverage of losses is reflected by an increase in price growth and affects milk and dairy.

Table 5

**Price growth for pasteurized and raw milk, tg.**

Product Name	2015	2016	2017.	2018	2019	2020	2021	2021/ 2015 %
Pasteurized milk	211,00	201,00	214,00	228,00	251,00	270,00	279,00	+132,23
Raw milk	168,00	178,00	195,00	211,00	222,00	244,00	250,00	+148,81
Pasteurized milk 3.2% fat content	227,00	209,00	224,00	239,00	257,00	277,00	277,00	+122,03
Pasteurized milk with 2.5% fat content	197,00	193,00	205,00	218,00	242,00	258,00	256,00	+129,95
Pasteurized milk 3.2-4% fat content	-	-	-	-	-	-	307,00	-

\* Calculated by the authors based on sources [11]

Table 5 shows the increase in prices for raw and pasteurized milk, pasteurized. As we can see, the increase in milk prices continues annually and over the past 5 years, pasteurized milk has increased in price by 132.23%, raw milk has increased in price by 148.81%, pasteurized milk with a fat content of 2.5% has increased by 129.95 and milk with a fat content of 3.2% has increased in price by 122.03%.

Based on our research, we came to the conclusion that the production of natural, Kazakh milk and dairy products is an expensive and low-profit process. Since the main part of producers of milk and dairy products are personal subsidiary farms, and not specialized agricultural enterprises as in Russia and Belarus. In addition, the population

owns low-breed cattle that are not focused on industrial production of milk and dairy products. Due to the need to regularly raise the price of milk and dairy products, Kazakhstani producers of processed milk will be forced to face competition in the face of imported manufacturers offering a similar product at a lower price. The solution to the problem may be the consolidation of small industries and the creation of forms of cooperation in which a legal entity will be created and it will be possible to make management decisions related to raising funds, modernization of production and the introduction of new technologies.

**Conclusions**

1. The main volume of milk produced in the

Republic of Kazakhstan is concentrated in households-75.5%, 19.5% is accounted for by agricultural enterprises, 5% is accounted for by peasant farms. In the region, small-scale production continues, that is, there is a concentration of milk production in farms where it is difficult to introduce intensive production and innovative technologies, as well as non-compliance with veterinary and sanitary standards.

2. The contribution of different categories of farms to the production of raw milk is determined and the gap in the milk yields of farms and households from agricultural enterprises is revealed. The analysis of the state of the dairy farming industry showed that the number of cattle in the Republic of Kazakhstan in 2020 amounted to 430.2 thousand heads, including 219.9 thousand heads of cows,

while the average annual milk yield from 1 head was 3173 kg per year.

3. Along with the growth in the production of milk and dairy products, the import of products from the EAEU countries is increasing.

4. In almost all regions, there is a low profitability of milk production and dairy products.

5. The following problems of sustainable development of the dairy industry were identified, the main of which are:

- low coefficient of the number of breeding cows.;
- small-scale production;
- seasonality of production;
- non-compliance with veterinary and sanitary standards.

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#### **ҚАЗАҚСТАНДА СҮТ ӨНІМДЕРІН ӨНДІРУ МӘСЕЛЕЛЕРІ**

##### **Андатпа**

Мақалада тұрақты зерттеулерді талап ететін Қазақстан Республикасындағы және өңірлік контексттегі сүт және сүт өнімдері нарығының проблемалары қарастырылады. Зерттеудің мақсаты сүт және сүт өнімдері өндірісінің ағымдағы жай-күйін зерделеу, сондай-ақ сүтті мал шаруашылығы саласының дамуына кедергі келтіретін проблемаларды анықтау болып табылады, олардың негізінде міндеттер: шаруашылықтар санаттары бойынша сауын сиырлардың санына мониторинг жүргізу, Қазақстан Республикасының өңірлерінде сүт және сүт өнімдері өндірісіне талдау жасау, шаруашылықтар санаттары бойынша сүт және сүт өнімдері өндірісіне талдау жасау, ЕАЭО елдерінен сүт және сүт өнімдері импортына талдау жасау болып табылады. Әр жылдары Қазақстан Республикасының ғалымдары өз жұмыстарында сиыр сүтін қайта өңдеу және сүт өнімдерін өндіру мәселелерін жария етті, бірақ тәжірибе көрсеткендей, зерттеудің бұл бағыты өзекті болып табылады және уақтылы шешуді талап етеді. Зерттеу процесінде бақылау, сипаттау, талдау және синтез сияқты жалпы ғылыми зерттеу әдістері, сондай-ақ салыстырмалы және басқа да таным әдістері қолданылады. Зерттеудің ақпараттық базасы Қазақстан Республикасында сүт және сүт өнімдерін өндіру туралы статистикалық деректер, сондай-ақ қазақстандық ғалымдардың жұмыстары болып табылады. Мақалада сауын сиырлардың басы туралы сандық ақпарат талданады, Қазақстан Республикасында сүт және сүт өнімдерінің өндірісі талданады, ЕАЭО елдеріне сүт өнімдерінің

экспорты мен импорты талданады. Осы мәселелерді шешу Қазақстан Республикасында сүтті қайта өңдеуді және сүт өнімдерін өндіруді дамытуға ықпал ететін болады.

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**ПРОБЛЕМЫ ПРОИЗВОДСТВА МОЛОЧНОЙ ПРОДУКЦИИ В КАЗАХСТАНЕ**

**Аннотация**

В статье рассматриваются проблемы рынка молока и молочной продукции в Республике Казахстан и в региональном контексте, которые требуют регулярных исследований. Целью исследования является изучение текущего состояния производства молока и молочной продукции, а также выявление проблем, препятствующих развитию отрасли молочного скотоводства, на основе которых задачами являются: мониторинг численности дойных коров по категориям хозяйств, анализ производства молока и молочной продукции в регионах Республики Казахстан, анализ производства молока и молочной продукции по категориям хозяйств, анализ импорта молока и молочной продукции из стран ЕАЭС. В разные годы ученые Республики Казахстан освещали в своих работах вопросы переработки коровьего молока и производства молочной продукции, но, как показывает практика, это направление исследований является актуальным и требует своевременного решения. В процессе исследования используются такие общенаучные методы исследования, как наблюдение, описание, анализ и синтез, а также сравнительные и другие методы познания. Информационной базой исследования являются статистические данные о производстве молока и молочной продукции в Республике Казахстан, а также работы казахстанских ученых. В статье анализируется количественная информация о поголовье дойных коров, анализируется производство молока и молочной продукции в Республике Казахстан, анализируется экспорт и импорт молочной продукции в страны ЕАЭС. Решение этих вопросов будет способствовать развитию переработки молока и производства молочной продукции в Республике Казахстан.

