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Рынок продовольственной продукции

policy is the competitive recovery of the meat products in order to provide imports substitution domestically. The increase of production of the livestock sub-sector will increase demand for crop products used for animal feed. In order to support these business objectives it is necessary to improve quality of domestic meat products and to progress to the stage of profitability, providing the extended reproduction of meat products.

The study aim is the livestock industry competitiveness definition, and factors determining the study of the meat production dynamics in all categories in farms, and the conclusions formulation on the beef competitiveness.

Kazakhstan is an agrarian country where historically the cattle industry development. The largest pastoral region in Akmola oblast, Kazakhstan. The livestock state and development is connected with the peculiarities of climatic conditions, the state and prospects food supply and other production factors development in the region.

Current state animal husbandry, and agriculture in general, is characterized by a decline in production and sales. This is due to the lower animals productivity, and, therefore, the shortfall

of the main products this industry. Agricultural production in the country today - small-scale, which is the main cause its weak competitiveness. The population concentration in private households significantly complicates the use of breeding achievements, advanced technologies and animals feeding is not possible to raise cattle using scientific methods and to achieve high productivity.

Over the years of reforms in the livestock sector experienced a sharp decline in livestock of all kinds of livestock and poultry, caused by a dramatic decline in fodder production, natural growth the prices on the production means.

In general, the animal husbandry development in Kazakhstan prevent four key factors. First, it is insufficient fodder provision, and secondly, low cattle breed, thirdly, the livestock concentration in Melocactus property, and fourthly, it is inadequate veterinary care [1].

These problems appeared during the years of independence in Kazakhstan due to insufficient attention to farming and agriculture in General, unsatisfactory execution the development programs of the agroindustrial complex. Table 1. presents the number of livestock by species for 5 years.

*Table 1 – Livestock at end of year, ths. heads**

Years	2008	2009	2010	2011	2012
Cattle	5 991,60	6 095,20	6 175,30	5 702,40	5 690,00
sheep and goats	16 770,40	17 369,70	17 988,10	18 091,90	17 633,30
Pigs	1 347,30	1 326,30	1 344,00	1 204,20	1 031,60
Horses	1 370,50	1 438,70	1 528,30	1 607,40	1686,2

*(the table is compiled on the basis of the data of the statistics Agency)

The animals number in the Republic in the period from 2008 to 2010 tended to increase for all animals types. However, starting in 2011, there was a reduction in the animals number. So, in 2012, the cattle number, compared with 2008 decreased by 300 thousand heads, which is 5% less. A similar situation has occurred with the pigs. Here the reduction is 23%. However, the number of sheep and goats, and horses tends to increase. The horses number increased by 315,7 thousand heads. The sheep and goats number increased in 2012 compared with 2008 862,9 thousand heads, or 5%.

Statistically Mangistau region is the least in number of cattles - 15 thousand animal units. The largest herd of cows there is in Almaty re-

gion farms, hereinafter in Eastern and Southern Kazakhstan.

The majority of small private farms has not been able to equip their mansions appropriate technical equipment, which negatively affects their products quality. The government has no possibility to exercise control over all farms immediately. This leads to malataverne, is particularly vulnerable tribal trend in livestock. Along with this arises the problem and reproduction of animals. Thus, the prevailing level purebred cattle is not possible to count on quality products and maintain a competitive position in the market.

Table 2 – Livestock numbers in the Republic of Kazakhstan at the end of 2013 [2].

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Livestock numbers, head ths	2013
Republic of Kazakhstan	5 760,9
Akmola region	365,4
Aktyubinsk region	390,6
Almaty region	940,9
Almaty region	940,9
Atyrau	142,8
West-Kazakhstan region	425,4
Zhambyl region	306,3
Karaganda region	426,0
Kostanay region	397,2
Kyzylorda region	243,2
Mangistau region	15,0
South-kazakhstan region	848,3
Pavlodar region	394,8
North –Kazakhstan region	280,5
East-Kazakhstan region	825,2

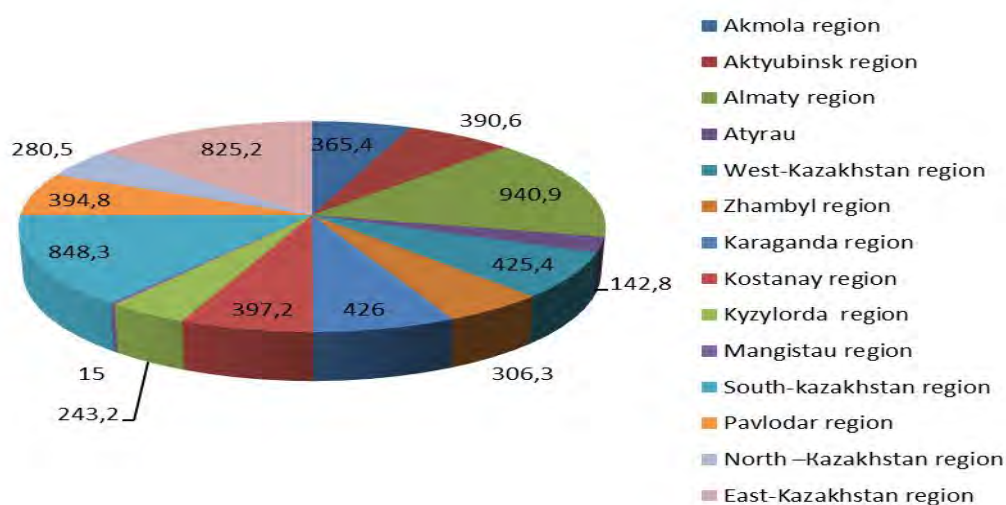


Figure 1 – Livestock numbers in the Republic of Kazakhstan at the end of 2013

The industry's continued growth in livestock production. According to the results of 5 years of cattle meat implementation in slaughter weight in the whole country tends to increase and is 934,1 thousand tons in 2012, which is 6, 9% higher than in 2008. In 2012 there was a reduction in milk yield of the cow (4851,6 thousand tons), up 6.7 per cent lower than 2008 (5198 thousand tons). The production of chicken eggs has increased in 2012 compared with 2008 684,3 million in absolute terms [2].

A large proportion livestock products produced in the population private farms, which leads to low productivity, does not allow for the growing domestic consumption, leads to high costs and reduced competitiveness, which leads to the formation of import dependence.

So, the main producers of beef are still households that, according to the statistics Agency in Kazakhstan on January 1, 2014, contains 3966 thousand heads of livestock and

poultry. While in the peasant (farmer) farms and agricultural enterprises, the average is you and 424 thousand heads respectively.

Modern volume of all kinds meat products provides the level consumption population, 84%; the remaining amount (up to standard) is covered by imports. Of this total production cattle meat only 3% is carried out on an industrial basis (specialized feedlots). About 85-87% of slaughter cattle (household slaughter) shall be a violation of the veterinary-sanitary norms, which does not ensure product safety and, consequently, the health population [3].

In 2012, Kazakhstan's per capita meat consumption amounted to 21.0 kg (table 3). Has reduced the gap between the European level to 6.4 kg. Beef, mutton, horsemeat and verbylyzhatina used by the population more than in Europe and the world. With consumption growth increased meat imports due to delay in production from consumption. As a result, compared with 2011

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meat production in 2012 decreased by 0.6% and amounted to 934067,7 tons in slaughter weight

(table 2). This is because the shortage of domestic production whereas imports.

Table 3 – Meat production in Kazakhstan for 2007-2012, thousand tons in slaughter weight [2].

	2007	2008	2009	2010	2011	2012
The production of meat, just	838,7	874,2	896,3	937,4	939,4	934,1
Including:						
Beef and veal	385,9	400,1	396,1	406	392,7	373,5
Pork	193,9	206,2	208,9	213	213,2	192,7
Lamb and goat	123,7	130,8	134,9	143	149,4	153,8
Horse meat	63,8	66,3	71,5	73	80,0	85,1

*Table 4 – Per capita consumption of meat per year, kg **

	2007	2008	2009	2010	2011	2012
Consumption of beef in the whole country	14,7	15,4	16,8	17,2	21,7	21,0
Consumption of beef urban population	15,8	13,3	18,1	18,3	23,8	22,9
Consumption of beef rural population	13,4	14,3	15,3	15,9	19,2	18,6

*(the table is compiled on the basis of the data of the statistics Agency)

In the Republic, in recent years there has been a concentration of more than 65 % cattle in population private farms, resulting in not specialized agricultural enterprises, namely households, which should produce products only for personal needs, become the main suppliers of meat products on the market.

The population concentration in private households significantly complicates the use of breeding achievements, advanced technologies and animals feeding is not possible to raise cat-

tle using scientific methods and to achieve high productivity.

The vast majority of small private farms has not been able to equip their mansions appropriate technical equipment, which negatively affects the quality of their products. The government has no possibility to exercise control over all farms immediately. This leads to malataverne, is particularly vulnerable tribal trend in livestock. Along with this arises the problem and reproduction of animals.

*Table 5 – The proportion of breeding stock cattle in all categories farms in Kazakhstan **

The number of breeding cattle in areas of productivity	The number of goals	Proportion to the total number of breeding cattle, %	Including cows, heads
The number of breeding cattle, including in areas of productivity	400880	100	178154
Meat breeds	159706	40	66712
Dairy breeds	119982	29,9	57503
Meat-dairy breeds	121192	30,1	53939

*(the table is compiled on the basis of the data of the statistics Agency)

Share of the breeding cattle number (400,8 thousand heads) in the total cattle number in the Republic (5702,4 thousand heads) is 7%, including the share of breeding stock beef breeds is 2.8%. Whereas in European countries this figure is much higher, 50-60%, in USA - 80% [3].

Share of the domestic cattle number to the global figure is 0.6 %. In Kazakhstan in 2010 produced beef 0.7 percent of total world production [4].

Own pedigree breeding stock in the country will not be sufficient to provide in the coming

years, a sharp rise in the beef cattle industry and bring this segment in the economy on export capacity.

Estimating species breeding beef cattle should be noted that all breeding cattle large portion on Kazakh white-headed breed, then a small part is occupied by rocks of Auliekol, Hereford, Santa Gertrude and Kalmyk.

In recent years took place in the Republic and also the reduction of the meat products export volume. In particular, this is due to the low specific gravity of industrial slaughter (13% of all

meat), unstable epidemic situation, expressed in violation of the veterinary-sanitary standards in content and slaughter, with high wear-and-tear, technical and technological backwardness fixed assets production of meat products and its inconsistency with international standards [5].

All this requires new infrastructure of industrial production, meat slaughter and processing. As it is in the developed countries [6]. Given the historical features of the meat production in the Republic, new infrastructure must maintain a combination of the feedlots branched development (for production of high quality meat products on an industrial basis) slaughterhouses network for cattle from the population. All this should ensure the safety, health protection consumers and the production of meat products, in compliance with generally accepted international standards.

Characteristic trends of the of beef cattle development in different countries and regions of the world are: continuous rising of the live-stock efficiency index, the usage of intensive technologies of growing and fattening cattle meat breeds based on the disposal of the high-quality feed balanced rations and the whole process mechanization. They improve the economic production efficiency of growing and cattle fattening operation.

One of the most important factor influencing the economic efficiency is the animal productivity, which is determined with the production quantity received from a single head for a particular period of time(day, month, year).

A major impact on carcass quality and sagination profitability has the achievable gain, measured with an average body weight gain in grams. An average daily gain is the primary productivity index of the sagination, working on the sagination period up to the required weight.

The initial factor affecting the production efficiency of cattle meat is heredity (genotype). It is necessary to have the heritability estimates for successful breeding cattle meat breeds and improvement of animal meat qualities. In practice it has to select animals for this purpose. This selection is carried out mainly according to quantitative characteristics: body and dressed weight, slaughter yield, average body weight gain, fat and protein concentration in meat, etc.

In accordance with many analyses there were determined the heritability estimates of specified characters, which indicate the beef productivity of cattle.

The highest heritability estimate is determined in according to the traits influenced the breed characteristics of animals.

The great impact on the animal productivity has also the breeder cattle distribution. Animal

breeding and constitutive features significantly reflect upon the indexes of the meat productivity. Cattle of the specialized beef breeds compared with dairy and combined directions productivity is more fast-growing, it reaches bigger body weight and slaughter age before rest.

Currently, there are mainly three breeds of beef cattle in Kazakhstan - Kalmyk, Hereford, Kazakh white-headed.

Animal breeding is the important factors of improving the efficiency of the beef farming. The animal productivity in the bred livestock farms exceeds the average of agricultural enterprises up to 2.3 times. The reason is they are introduced advanced software techniques of livestock breeding, evolved selected-brood programs, and improved quality of the farm animal's records.

The reproduction herd factor also has an effect on the development of meat cattle breeding, statutory values of which should be at least 25-30 %.

Today this index of the beef-farming sector of the country does not exceed 15 %. Such trend tends to the animal production loss.

The optimum capacity of the beef cattle reproduction is the crop of 80-85 calves from 100 cows. The calf crop does not exceed 65-70 head per 100 cows in most organizations[7].

The animal growth and productivity depend primarily on the level of feeding. The improvement qualities of animal feeding is the basic term for intensification of production and its efficiency raising. Without this term the most of feed is used for basic life support in the body, and the lowest part in its turn is used to get gain. As the result, the feed efficiency ratio grows significantly.

An intensive feeding improves both slaughter qualities and meat quality, because there are grown muscles in the carcasses of such animals, they are quite well-fleshed.

Insufficient feeding, on the contrary, decreases the growth rate of animals, extends fattening period, increases the costs of feed, labor. The carcasses of such animals are off-quality, there are more bones and connective tissue.

Depending on their capacity and capabilities organizations choose different diets. The main criteria of the diets are good digestibility, energy value, energy and protein, microorganisms and vitamins providing with regard to physiological state. An incorrect diet and the low-quality feeds usage lead to disturbance in animal metabolism.

An equally important factor to increase the economic efficiency of animals is to improve the quality of feed and especially their energy and protein nutrient density.

A significant factor of the economic efficiency improvement is the balanced feeding, when the diet has all the nutrients valuable for the animal body in accordance with their productivity and physiological status. According to specialists, up to 20-30 % of animal products are failed because of the off-quality feed and inadequate diets.

The meat productivity indexes depend on age also. Slaughters yield changes with advancing age. In the first 6 months it is characterized by lows, then increases, and decreases with an animal aging again. The adult animals have the higher yield of such valuable cuts like sirloin, brisket, sirloin, and rump. The relative quantity of bones in their carcasses diminishes.

Some of the factors that have a significant impact on the milk cow productivity are workplace management in livestock farms and breeding complexes, the production technology. Equally important is the staff provision of livestock enterprises by livestock farmers, livestock specialists, veterinarians, engineering and technical personnel, the remuneration system, moral and material motivation of employees, ownership, etc.

Cattle meat production remains one of the most problem and time-consuming area in livestock and, unfortunately, still unprofitable (- 17 %). That is why the production of cattle requires special support measures.

CONCLUSIONS

Thus, to solve the existing problems in the livestock industry needs to continue to encourage SHTP to the cattle breeding development, the breeding base and increase the genetic potential of livestock and poultry, including through imports of breeding animals for further reproduction. It is also necessary to take measures for the development of fodder production, restoration and irrigation of degraded pasture lands.

An important innovative development direction of the livestock sector is the breeding efforts improvement, for which the characteristic tendencies inherent in the modern stage development in the industry.

Studies have shown that in the Republic in the face of increased import pedigree products weakened their own breeding base of livestock, many farms do not have positions zootechnics the breeder, the market system of buying and selling breeding material is formed spontaneously with numerous intermediaries. No single plan selection and breeding work, and its control is carried out simultaneously from multiple centers, which leads to inconsistencies and reduces their effectiveness. Currently, the system control tribal service reforms. Create a single information center where there will be analytical information and

development processing of recommendations for the comprehensive development and breeding efforts improvement in all sub-sectors of livestock.

An alternative to purchasing preproduction abroad should be the development of domestic breeding, for which you want to create your own loudspeakers with genetically upgraded herd and use modern breeding techniques. In parallel it is necessary to solve the problem: motivation and training, which inhibits the use modern technologies in the industry. Despite the fact that low pay is an internal competitive advantage Kazakhstan livestock production compared to imports, this advantage is at the same time causes the opposite effect, which is expressed in the absence of material incentives to workers in the labour results and leads to the specialists outflow in more than paid industry.

To solve the above problems requires, of course, public support, which primarily should be directed to:

- the thoroughbred breeding and cattle purchase;
- the breeding heifers purchase;
- the purchase of bulls, high-value seed bulls and embryos meat breeds from outstanding parents;
- the industrial crossbreeding part of Queens in dairy herds with bulls of beef breeds;
- the establishment of service centres for artificial insemination of cattle;
- the fodder strengthening;
- the technological modernization of the meat reproductive farms;
- the creating and technological modernization fattening enterprises.

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СОСТОЯНИЕ И ПЕРСПЕКТИВЫ РАЗВИТИЯ РЫНКА МЯСА И МЯСОПРОДУКТОВ В РЕСПУБЛИКЕ КАЗАХСТАН В УСЛОВИЯХ ЕАЭС

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Рассмотрено состояние рынка мяса как главной экспортоориентированной продукции животноводства республики в условиях ЕАЭС и предстоящего вхождения в ВТО, рассчитаны необходимые объемные показатели его развития на ближайшую перспективу.

ЕАЭО жағдайында және ДСҰ-на кіру алдында республика мал шаруашылығы басты экспортқа бағдарланған ет өнімдері рыногының жағдайы қарастырылған, жақын болашақта оны дамытудың қажетті көлемдік көрсеткіштері есептелген.

The state of meat market as the main export oriented livestock production in the republic in terms of the EAEC and the forthcoming accession to the WTO has been highlighted, the required volume indicators of its development in the near future have been calculated.

Ключевые слова: мясное скотоводство, ресурсы, средне- и крупнотоварное производство, конкурентоспособность, господдержка, стимулирование субсидирования.

Тұтқалы сөздер: етті ірі қара шаруашылығы, ресурстар, орта және ірі тауарлы өндіріс, бәсекелестік қабілет, мемлекеттік қолдау, субсидиялауды ынталандыру.

Keywords: beef cattle production, resources, medium and large commodity production, competitiveness, public support, promotion of subsidizing.

В связи с функционированием Евразийского экономического союза (ЕАЭС) и дальнейшим вступлением республики в ВТО рынок мяса будет развиваться в условиях конкуренции со странами ближнего и дальнего зарубежья, а также постепенного повышения потребительского спроса на внутреннем рынке. С другой стороны, для национального рынка расширяются возможности экспорта высококачественного конкурентоспособного мяса КРС в страны ЕАЭС, в частности Россию.

Поэтому основная цель развития рынка мяса и мясoproдуктов в Казахстане – достижение самообеспеченности ими при рациональных нормах потребления и всемерное наращивание экспорта высококачественной продукции, прежде всего, говядины, для этого в республике имеется значительный потенциал.

Приоритетность данной подотрасли животноводства обусловлена, прежде всего, наличием большой площади (около 187 млн га) пастбищ, что дает возможность производ-