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**ASSESSMENT OF CONSUMER PREFERENCES  
IN THE MARKET OF DAIRY PRODUCTS  
OF THE SOUTH KAZAKHSTAN AREA**

**Abstract.** The materials presented in the article are the result of a field study in order to identify the consumer preferences of the population with respect to dairy products sold in retail outlets of the South Kazakhstan region. Particular attention is paid to new opportunities for producers in the use of marketing tools to improve the competitiveness of domestic dairy products compared with analogues from other countries. The results of the survey of consumers, identified weaknesses and strengths of the market participants, as well as analyzed the main components of the market of dairy products in the region using the matrix BKG.

The study found that the economic value of the food market is determined by its social value, since the health of the nation depends on the degree of filling the market with food resources of a certain quality and the ability to meet consumer demand.

**Keywords:** research, consumer, marketing, dairy products, questioning, preferences, brand.

The mechanism of formation and functioning of the food market, in particular, the market of milk and dairy products is represented as interaction of objectively operating factors, the phenomena and processes in the sphere of production of raw materials, distribution, processing, realization and consumption of food products. Functioning of this market is defined by a ratio of needs of the population, internal production capabilities and development of interregional connections. Accounting of all these factors – a difficult, but necessary task of research of this problem.

The future of the overworking organizations – behind development and realization of the competent marketing strategy directed to creation and advance of own brand or brand within a certain region. This way of development, certainly, is rather difficult and expensive, but it opens broad prospects for development of the consumer market.

Today, to develop the milk and dairy products market, to retain existing consumers and attract new ones, measures are needed to "rejuvenate" the product itself through the use of trends in design, communications; acquaint consumers with innovations in the dairy industry and, of course, provide information on the benefits of milk and dairy products not only for children, but also for people of other age categories.

The second direction of work – "rejuvenation" of brands, overcoming stereotypes in design, realization of communication strategy, introducing into dairy products of new energy and inspiration.

The third strategy of growth in the market – development of sales of high-marginal assortment positions.

Now in the market of dairy products for the small milk-processing organizations are underutilized the following opportunities of marketing tools of work with the market:

- the strong, actualy brand creating a certain navigation for consumers and forming strong loyalty;
- differentiation of a product in the competitive environment through creation of "technological myths" and other examples of positioning of competitive advantages;

- increase in value of dairy products as necessary product, his embedding in modern culture and lifestyle for giving of relevance and involvement of consumers;
- use of novelties as a brand drivers, the attracting low-active consumers, the rejuvenating brand and stimulating sale of high-marginal positions;
- attraction "conscious" and ready to new the consumers focused on a brand with low sensitivity to the price, such consumers, who are not indifferent to quality of dairy products.

Expansion of the range and improvement of quality of production by introduction of innovations, modernization and technical re-equipment of the operating enterprises, transition to the new resource-saving technologies capable to provide deep processing of raw materials have to become the main directions of development of dairy branch of processing industry.

For the last decade the range of dairy products has considerably extended, and as result, active development was gained by a yogurt and dessert segment of the market. At the same time, there is a tendency to reduce the consumption of thermized products in favor of natural products. So, natural yoghurts without additives are in high demand. In accordance with the "Technical Regulations of the Customs Union on the safety of milk and dairy products (TR TC 033/2013)" the whole variety of dairy products can be divided into four groups (Table 1).

The most capacious and various of these four groups – dairy products in which structure are included milk, fermented milk products, cottage cheese products and milk drinks.

Goods in the market of purchase of dairy raw materials by processing enterprises is cow's raw milk. The sphere of circulation of this product consists of certain stages: the production of dairy raw materials by agricultural producers - the sale of milk by them - the purchase of milk by processing enterprises. The purchase of milk is the last stage of the circulation of this product in the analyzed market is defined as raw milk for subsequent processing.

Table 1 - Classification of dairy products

| Dairy product   | Dairy compound products   | Milk-containing products   | By-products of processing of milk  |
|---|---|--|--|
| <ul style="list-style-type: none"> <li>- The milk which has undergone processing (pasteurized sour milk);</li> <li>- Fermented milk product (kefir from Fudmaster of 1-2,5%);</li> <li>- Cottage cheese product (suzbeshe)</li> <li>- Milk drink (sour milk drink)</li> </ul> | <ul style="list-style-type: none"> <li>- Curd mass (clabber)</li> <li>- Frozen cheese (cheerful milkman), etc.</li> </ul> | <ul style="list-style-type: none"> <li>- Milk dessert (miracle);</li> <li>- cottage cheese two-layer (Agusha);</li> <li>- Fruit cottage cheese (zdrayver), etc.</li> </ul> | <ul style="list-style-type: none"> <li>- Secondary dairy raw materials;</li> <li>- Milk whey with fruit juice (berries) (actual, jussi)</li> </ul> |

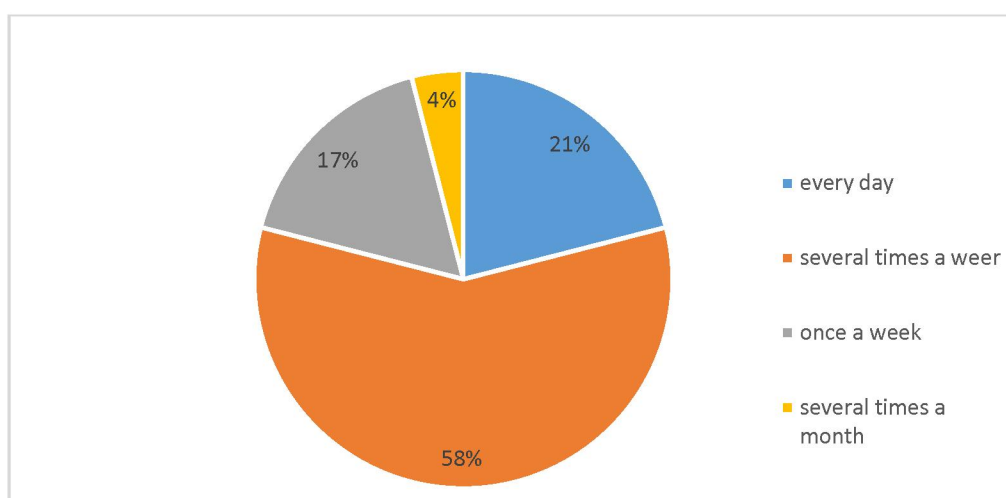


Figure 1 - Distribution of answers to the question "How often you consume dairy products?"

For assessment of consumer preferences of population of the city agglomeration and the rural population of the South Kazakhstan region, a survey was conducted of a sample of respondents living in

the territory of the region. The survey has revealed differences of demand for dairy products of the specified groups of the population. Less often than once a week dairy products consume the few – only 4% of respondents; 0% claim that in their family dairy products don't eat at all (Fig. 1).

During the research it has been revealed that the rural population give preferences to traditional dairy products, such as sour cream, milk, kefir while inhabitants of city agglomeration are adherents of dietary dairy products, products with use of various additives, yogurts, cheeses, etc.

According to data of questioning, milk and dairy products – one of the main components of a diet of southern Kazakhstan citizens. In the overwhelming majority of families (96%) dairy products use, at least, 2 times a week – and, as a rule, these products are present on the table or every day (every fifth of respondents of-21% says), or at least several times in a week (about this every second says – 58%). Most often from dairy products buy milk (31% of respondents) and yogurt (21%), is less often kefir (12%), sour cream (10%), cottage cheese and cottage cheese products (10%). Respondents, in whose families they eat dairy products (4% of the sample as a whole), stated that they are forced to limit themselves in their consumption; most of this group of respondents claim that they do so because of savings or because of low adherence to dairy products (Fig. 2).

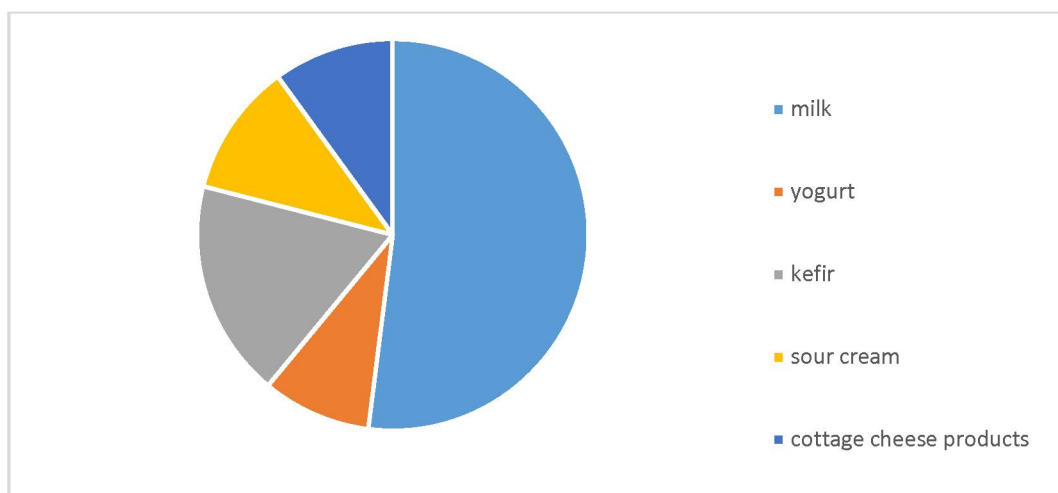


Figure 2- Distribution of answers to the question "Which dairy products do you buy more often?"

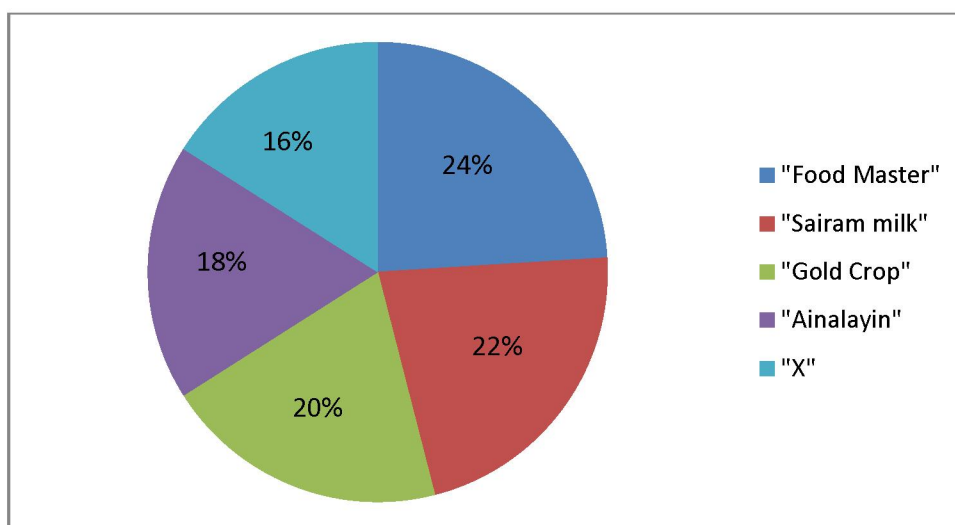


Figure 3 - Distribution of answers to the questionnaire question "What kind of milk do you prefer?"

Most of respondents buy dairy products from milk sellers with home delivery, in the markets, on the street (47%), 40% of those surveyed in the store "from the house", 13% of respondents prefer to buy dairy products in supermarkets. If to consider the fat content of the bought milk, then a half of respondents (50%) give preference to milk with the fat content of 2,5%, 35% of respondents – to milk with the fat content of 3,5%. Respondents give the greatest preference to milk to the following brands: "Food Master" - 24%, "Sayram sut" - 22%, "Altyn Dan"- 20%, "Ainalayin"- 18%, "Moye" 16% (Fig. 3).

On one of the questionnaire questions was an attempt to find out whether, in the respondents' opinion, prices for dairy products are growing in the last month or two. The majority of respondents (62% on sample) say that in the SKR, prices for dairy products actually increased, with 22% of respondents saying that prices have risen substantially.

Only 2% of respondents said that in South Kazakhstan region the prices for dairy products remained at the previous level. The considerable number of respondents (36%) were at a loss with the answer to this question at all.

Those respondents who have noted increase in prices for dairy products, asked to specify why in their opinion, it occurs. As a rule, participants of survey connected the rise in prices or with the general increase in cost of life, or with a specific situation in the Kazakhstan livestock production.

The prevailing weaknesses of production and realization of dairy products are production and marketing positions, they demand more investment investments and development of economic incentives for attraction of external investments, hence low positions on financial indicators.

According to M. Porter's "web" (Fig. 4), a position of a dairy and grocery subcomplex are moderate, the main threat is the high level of occurrence of competitors on the market of dairy products with the known brands ("A lodge in the village" (Domic v derevne), Danone, "The cheerful milk seller"(Veselyi molochnic), Wimm-Bill-Dann, "Hochland", "Fud Master", etc.).

Weak position is the low level of appeal of dairy cattle breeding therefore reduction of the offer of raw milk leads to decrease in volume of production of dairy products by local processors that allows stronger competitors to occupy the freed niche in the market of dairy products.

In the regional market of dairy products, marketing positions are considered to be more moderate, therefore, in order to maintain market share and competitive advantages, it is necessary to intensify work on branding of regional brands of dairy products, taking into account differentiation of prices by market segments (rural, urban, suburban population).

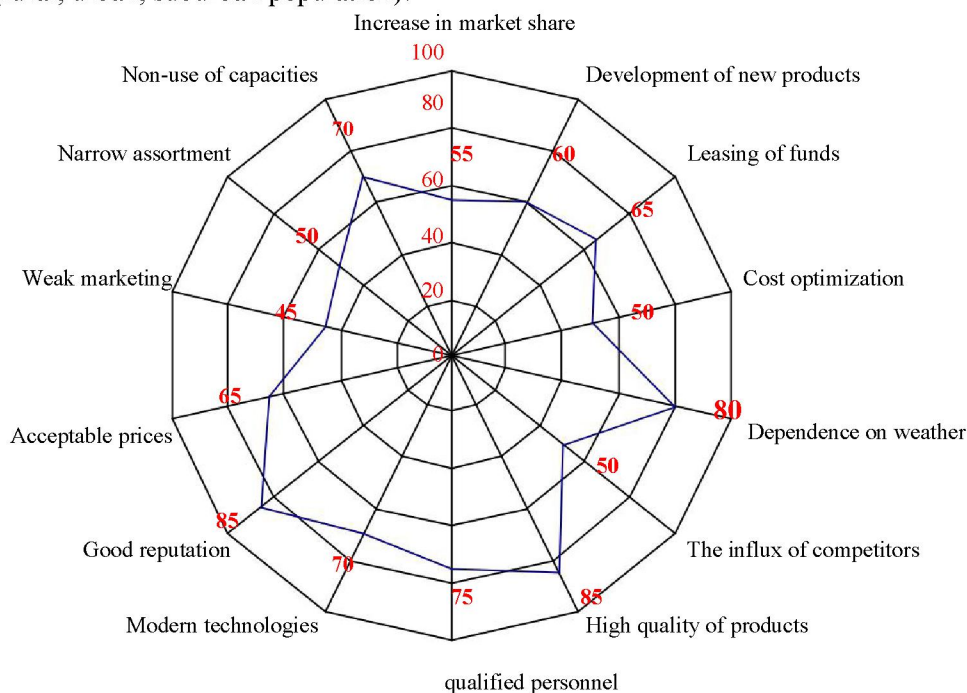


Figure 4 - Main positions of SWOT analysis market of milk and dairy products

To analyze the product portfolio, the main components of the dairy products market of the region were analyzed using the BKG matrix (Table 2).

Table 2 - Matrix BKG of dairy products of own production

| Growth rate of the market | Relative market share                            |   |
|---------------------------|--|---|
|                           | High   | Low   |
| High                      | «Stars»<br>25-35%<br>Group of products: 4, 5     | «Difficult children»<br>10-15%<br>Group of products: 6, 7 |
| Low                       | «Cash Cows»<br>45-65%<br>Group of products: 2, 3 | «Dogs»<br>5-10%<br>Group of products: 1, 8                |

Matrix Boston Consulting Group (BKG) allows you to segment products by market share and growth rates of demand for this type of dairy products. Dairy products are divided into groups: whole milk products, cheese products, butter, sour-milk products, canned milk, baby food, dietary dairy products, cottage cheese products, ice cream.

Relatively low share of the market and low rates of demand characterize children's, dietary and cottage cheese production - up to 15% sales volume. These products have a relatively high price and competition from imported (Germany, Poland, Latvia, Russia) and imported domestic products (Almaty, Taldykurgan, Taraz, etc.). Its promotion in the market requires significant marketing costs.

The most popular dairy products include sour-milk products - up to 35% of the market share. It is available at a price is a product of secondary processing), is useful for all categories of consumers, is diverse in its assortment.

Products with a high share of sales include cheese of various varieties and butter - up to 65%, buyers prefer butter of Kazakhstan production as the most qualitative and inexpensive.

Whole-milk products and ice-cream are traditional products for the regional consumer due to the limitation in terms of implementation and the pronounced seasonality of consumption (ice cream). This product occupies up to 95% of the market share and is least influenced by competitors.

The nutrition value of drinking milk and its derivative products (cream, sour cream) is various (depending on the level of milk fat) therefore retail prices are differentiated especially as marketing of these perishable goods is more expensive, than processing products.

The conducted research has allowed to establish that the economic value of the food market (at any level) is defined, first of all, by its social value because health of the nation depend on degree of fullness of the market food resources of a certain quality and a possibility of an udovletovoreniye of consumer demand. A regional approach to the study of the food market made it possible to determine that demand in the food market is formed primarily at the macro level, that is, it is set by the external environment, although it is always personified by market participants, and the supply is influenced by the internal environment, although the external environment, certainly, exerts a certain impact on him. The internal environment of the food market as a micro system is formed in the region and determines the specificity of the existence of the regional food market as an important element of the regional system.

The research of the dairy market with the help of regional marketing convinces us that both the studied markets in general and their individual segments break up structurally into two parts: for one of them there is really a weak concentration and monopolistic competition, and for another - a high or moderate degree of concentration and oligopoly (rigid or vague).

Also, besides state regulation it is necessary to develop and introduce correction methods capable to influence at the same time supply and demand in separate segments for the purpose of their increase.

Such economic methods include stimulating the creation of vertical-horizontal marketing systems. Vertical marketing systems, freed from the shortcomings of their modern use, capable of uniting manufacturers - processors, buyers, sellers, investors into a single value chain and jointly withstand

seasonality and cyclicity in agricultural production, as well as negative natural and climatic phenomena which objectively is development of agriculture.

Horizontal marketing systems promote association of the sellers of food working directly with consumers and the promoting domestic food products on the market. They minimize trade expenses, accelerate turnover of the capital and, at last, vopolnyat social function, influencing tastes of consumers, their variety, promotes maintaining demand even in the conditions of fall of income of the population.

Creation of uniform vertically horizontal marketing system allows to develop the modern mechanism of a funkionirovaniye of the food market, not subject market elements and ensuring food security of the country. Thus, the mechanism of improvement of formation and management of consumer demand in the market of dairy products has to be based on a combination of interests of all subjects of activity of this market.

In this regard, it is necessary to increase the number of the enterprises of the dairy industry and to increase the production capacity of the overworking dairy industry of the South Kazakhstan region (production of the milk processed liquid and cream, butter, cottage cheese) around the city and districts, to consider the possibility production of milk in a firm form.

At the moment, the state carries out the programs "DKB-2020", "Agrobusiness-2020", "Exporter-2020", "Employment 2020", "Productivity-2020", therefore it is necessary to use tools to increase the number of cattle, dairy farms, using modern machinery and increasing production capacity by modernizing the equipment of the operating enterprises of the dairy industry of the southern region.

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#### **ОЦЕНКА ПОТРЕБИТЕЛЬСКИХ ПРЕДПОЧТЕНИЙ НА РЫНКЕ МОЛОЧНОЙ ПРОДУКЦИИ ЮЖНО-КАЗАХСТАНСКОЙ ОБЛАСТИ**

**Аннотация.** Представленные в статье материалы являются результатом проведенного полевого исследования с целью выявления потребительских предпочтений населения относительно молочной продукции реализуемой в торговых точках Южно-Казакстанской области. Особое внимание уделено новым возможностям для товаропроизводителей в части использования инструментов маркетинга для повышения конкурентоспособности отечественной молочной продукции по сравнению с аналогами из других стран. Приведены результаты опроса потребителей, выявлены слабые и сильные стороны участников данного рынка, а также проанализированы основные составляющие рынка молочной продукции региона с использованием матрицы ВКГ.

Проведенное исследование позволило установить, что экономическое значение продовольственного рынка определяется его социальным значением, так как здоровье нации зависит от степени наполняемости

рынка продовольственными ресурсами определенного качества и возможностью удовлетворения потребительского спроса.

**Ключевые слова:** исследование, потребитель, маркетинг, молочная продукция, анкетирование, предпочтения, бренд.

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**ОҢТҮСТІК ҚАЗАҚСТАН ОБЛЫСЫ СҮТ  
ӨНІМДЕРІ НАРЫҒЫНДА  
ТҰТЫНУШЫЛАРДЫҢ ҚАЛАУЫН БАҒАЛАУ**

**Аннотация.** Мақалада ұсынылған материалдар Оңтүстік Қазақстан облысы сауда орындарында өткізілетін сүт өнімдеріне қатысты тұтынушылардың қалауын анықтау мақсатында жүргізілген далалық зерттеудің нәтижелері болып табылады. Басқа елдердің аналогтарымен салыстырғанда отандық сүт өнімдерінің бәсекеге қабілеттілігін арттыру үшін маркетинг құралдарын пайдалану жағынан тауар өндірушілерге жаңа мүмкіндіктердің туындағанына ерекше назар аударылған. Тұтынушылардың сауалнамаға қатысу нәтижелері, бұл нарыққа қатысушылардың күшті және әлсіз жақтары келтірілген, сонымен қатар ВКГ матрицасы пайдалану арқылы аймақтағы сүт өнімдері нарығының негізгі құраушылары талдаудан өткізілді.

Жүргізілген зерттеу азық-түлік нарығының экономикалық маңызы оның әлеуметтік маңызымен анықталатынын айқындады, өйткені ұлт денсаулығы нарықтың белгілі сападағы азық-түлік ресурстарымен толықтыру дәрежесіне және тұтынушы сұранысын қанағаттандыру мүмкіндігіне байланысты.

**Түйін сөздер:** зерттеу, тұтынушы, маркетинг, сүт өнімдері, сауалнама, қалаулар, бренд.