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A.E. Kokenova¹, M.A. Eskara²,
B.B. Orazova³, A.A. Turlybekova⁴, A.B. Mukhamedkhanova⁴

¹ International humanitarian and technical University, Shymkent, Republic of Kazakhstan;

² Peoples' Friendship University named after Academician A. Kuatbekov,
city of Shymkent, Republic of Kazakhstan;

³ University of Miras, city of Shymkent, Republic of Kazakhstan;

⁴ Regional social innovation university, city of Shymkent, Republic of Kazakhstan.

Email: akmira777@mail.ru

THE DEVELOPMENT OF THE MEAT MARKET IS AN INTEGRAL PART OF THE COUNTRY'S STRATEGIC FOOD SECURITY STRUCTURE

Abstract. The meat subcomplex occupies a special place in the agro-industrial complex and in the food supply system of the population, therefore, its development should be a priority, sustainable and dynamic.

Since meat and meat products are consumer goods, the development of the meat subcomplex of the agro-industrial complex and the saturation of the food market with meat products in a wide range, high quality and at affordable prices is an urgent task for all regions, especially for those that have the greatest potential not only to meet intraregional needs, but also for interregional exchange. One of these regions is the Smolensk region, a region that was formerly developed for meat and dairy cattle, pig and poultry farming.

The transition of the country's economy to market relations has aggravated many economic problems. They are most acute in agro-industrial production. Market processes are accompanied by a number of negative phenomena - the unprecedented decline in livestock production, the reduction of livestock numbers, rising losses from death of animals, the imbalance of the relationship between the commodity sector of agriculture and processing industry, increased cost, decreased efficiency, rising prices for meat and meat products and as a consequence slow development and sustainable functioning of the food market; the unsatisfactory provision of the population with meat and meat products of domestic production; massive imports of meat products, mostly of poor quality; a threat to the country's food security.

The article discusses the situation in the Kazakh market of meat and meat products.

A statistical analysis of changes in the meat subcomplex of the country was carried out.

The main trends that determine its further development are identified. These include, first of all, the concentration of production and vertical integration in the processes of production, processing and sale of products, the decrease in the share of meat produced in households, the growth of food retail chains, changes in the structure of retail commodity resources and in the structure of the population's preferences in meat consumption. The analysis shows that the positive results of the industry's development give reason to believe that the domestic production of final meat products is close to the volume of consumption and food security criteria.

The results of the study can be used to analyze and forecast structural changes in the country's agricultural sector. The article also concludes that the further development of the industry will be determined by two trends: the growth of meat production and a decrease in the purchasing power of the population.

Keywords: export opportunities, market conditions, domestic market, foreign market, agriculture, infrastructure, competitive products, investments, dynamic development, and agro-industrial complex.

Introduction. Dynamic development of the agro-industrial complex one of the main principles of the government is export diversification and employment growth.

The first block of the agro-industrial complex investment project is designed to solve the problems of agricultural product depreciation. 3 projects are being implemented in this direction. First of all, the development of a network of greenhouses.

In accordance with consumption standards and the current situation in the country, an additional 168 hectares of greenhouses are required. In the next 3 years, it is planned to introduce 20 hectares per year in major cities, which will reduce the yield of vegetables by 40 % and significantly reduce the current market difficulties. In addition, modern technology of greenhouse production will increase productivity by 20 times compared to products produced in the open ground. Develops a network of vegetable stores. The country will have modern storage facilities worth 75 tons. When growing fruits and vegetables in the open ground, the introduction of drip irrigation in new production technologies increases productivity by 3 times and reduces water consumption for irrigation by 4 times [1].

The second block of the investment project will be devoted to the development of Kazakhstan's meat exports. Kazakhstan currently does not export meat products. And Russia a year is not from us, but from Brazil, Argentina and Mexico up to 2 million us dollars. ton of meat. Russia exported 500 thousand tons of meat, which is 2.7 billion dollars. this would be more export revenue from the grain product. Therefore, we offer three different investment projects. The first is the creation of feedlots. The second is the creation of slaughter sites in rural areas of the Akmola region. The third is the organization of modern meat processing complexes for production [2].

This is directly related to the development of animal husbandry. In the coming years, first of all, we are opening large commercial dairy farms throughout the country. Secondly, we are implementing the development of processing and production of fine wool. Kazakhstan has excellent natural conditions for the development of wool production with a thickness of 19-23 microns, which is in demand in recent years on the world market as Australia. Third, the country will create a complex of poultry farms aimed at eliminating import substitution, based on the production of poultry meat and eggs.

Methods. Methodological research is a common method of scientific knowledge-analysis and synthesis, content-media analysis of sociography, a system-comparative method that allows you to determine the Genesis, sequence and functioning of the stages of development of the meat market, the attractiveness and effectiveness of the meat market.

Research and experimental and methodological work in the field of development and effective development of the meat market.

Results and discussion. It should be noted that today, in the context of globalization in the world agri-food market and the relevance of issues of ensuring food security of the country, the agro-industrial complex in Kazakhstan has a stable impact on the development of agricultural production. All the conditions have been created for this in our country.

Meat production in the Republic of Kazakhstan is traditionally one of the main and specific directions in agriculture. By the end of the 80-ies of the last century, high indicators of meat production were achieved, the annual volume of meat production amounted to 1.5 million us dollars up to 86 kg per capita, which is 66 kg in all-Union consumption [3].

The total capacity of all processing enterprises in the Republic of Kazakhstan at the end of the 80-ies of the XX century was more than 2,250 tons per shift. The capacity of most of them is up to 20-100 tons per shift, and two large ones – more than 200 tons per shift: Semey meat processing plants (389 tons per shift) and Almaty (386 tons per shift). But the reforms of the agro-industrial complex in the 90s did not lead to an improvement in either production or economic indicators. Hasty equated actions in this area were not deep reflection, poorly initialed and scientifically imperfect.

The current state of meat processing industries in Kazakhstan in the early 90-ies of the XX century is much worse. currently, there are 68 large and medium-sized enterprises in the Republic that process meat products with a design capacity of 687.6 thousand tons per shift (in terms of meat), or 30.5 % compared to the level of 1990. Many enterprises do not work completely or are idle with problems of raw materials and working capital. Enterprises in the southern and Western regions of the country even remained fully operational. In South Kazakhstan region there are four large meat processing plants, in Atyrau and Mangistau regions there is almost no production processing of meat, and in Kyzylorda and Zhambyl regions there is only one medium-sized enterprise. During the transition period, Semey, Karaganda, and Petropavlovsk meat processing plants were particularly hard hit, which in the new conditions are considered inefficient and eventually fell into decline [4].

The world's largest meat exporter-Brazil's experience shows that this is the main factor in the development of the country's livestock meat industry.:

- convenient packaging of single-blood plantation (coffee plantations, orange cultivation) types of products that are in demand on the world market, along with export products such as sugar cane, soy, corn, the main types of feed ration in animal husbandry;
- features of the use of year-round pasture livestock;
- expansion of the cultivated area of agricultural land;
- investment and necessary financing of the agricultural sector;
- low cost of production of animal feed;
- introduction of modern technological processes in meat production: selection, nutrition, carrying out and implementation of veterinary and preventive measures;
- liberalization of agricultural exports: cancellation of export licenses, collection of customs tariffs and quotas for agricultural products;
- state support for lending, implementation of a type of state credit support for farms in the form of a preferential production line;
- creation of large commodity farms based on meat production;
- reducing the cost of fattening livestock, reducing its cost [5].

In 2018, the Republic of Kazakhstan as a whole imported 896.3 thousand tons of cattle and poultry, which is 2.5 % more than in 2019.

22 % of the average meat production is used for industrial processing. Most of the meat produced is used for personal consumption [4].

The level of consumption of meat and meat products of the population (in terms of meat) exceeds the national standard of consumption by 39 % (48 kg / year per person) and is 67 kg/ year per person.

When processing cows, you can see that the level of import dependence has significantly increased: sausage products by 40 %, canned meat by 52 %. More than 90 % of sausage products and canned goods are supplied from Russia [5].

In 2020, the country plans to increase meat production to the level of 1,140 thousand tons, including 500 thousand tons of cows, 175 thousand tons of sheep and 50.0 thousand tons of cows [5].

Nature itself has dedicated Kazakhstan to the development of animal husbandry. But in popular restaurants around the world, it is much easier to find beef from New Zealand, rather than from Saryarka.

In 2020, meat exports should reach 60 thousand tons, which is equal to 4 million tons of grain exports. The state allocated 130 billion tenge of credit resources for the development of animal husbandry. This will provide more than 20 thousand jobs in rural areas and generate income for more than 100 thousand villagers [4].

If 20 years ago Kazakhstan exported more than 180 thousand tons of meat, in 2019-only about 300 tons. This is a sign of the irreversibility of the huge opportunities of animal husbandry.

However, our Republic is favorable to all conditions for the development of meat production in animal husbandry. These are all natural pastures (\$180 million). arable land) and unused, low-waste pasture technologies in meat production of livestock.

In addition, animal husbandry is a traditional profession of the local population.

All this demonstrates the ability of Kazakhstan to compete in the world meat market. Our country is the largest market importer by geographical location (primarily Russia and China).

But the main condition for the development of the meat industry of livestock remains the use and reconstruction of the latest modern technologies.

In accordance with the instructions of the Head of state, KazAgro national Holding has developed a project to develop the possibility of exporting cattle meat. The world experience of exporting countries of the USA and Australia was considered here.

In the implementation of this project, according to the developers-without the complexity of interconnected participants-business units: feedlots node, farms, farms-reproducers, centers for management and modernization of the herd, feed-producing infrastructure and ensuring veterinary welfare, as well as the sale and marketing of final products is impossible.

During the implementation of this project in the next five years, 60 feedlots for 150 thousand heads, 54 farms-reproducers for 72 thousand heads, 2.5 thousand farms, centers for updating the herd will be launched simultaneously [6].

In total, in 2016, it is planned to increase the production of meat to 60 thousand tons, and in 2020-180 thousand tons [4].

However, when the approved export restrictions are reached, the livestock renewal infrastructure and the relationship between exports and meat production will be achieved. According to calculations, the need for financing the project in the next five years will amount to 148 billion tenge. The source of the tool is the Republican budget and the national Fund [2].

But the developers proposed to review and synchronize the existing measures of state support in improving the effectiveness of the project. In the future, as a result of its implementation, it is planned to reduce the cost of meat production, which will reduce the total amount of subsidies.

In turn, the holding "KazAgro" provides leasing programs, predicts the need to provide them with fodder and special equipment for feeding livestock in agriculture, which emphasizes the need for an appropriate feed base for the successful development of livestock.

The first stage of the project is to increase the number of cattle and increase their genetic capabilities. Currently, more than 82 % of cattle are raised in low-productivity and private farms.

As a result, the main supplier of meat products on the market are non-specialized agricultural enterprises, including households intended for their own consumption of products.

In this case, the products of private farms become uncompetitive in the foreign market.

To solve the problems that arise in the development of the meat processing industry in agriculture, it is planned to increase the number of cattle by crossing the existing domestic meat direction with highly productive bulls, as well as the import of 72 thousand heads of breeding cattle of the meat direction. Due to the fact that the main part of the livestock population is located in private farms, much attention is paid to artificial insemination of these categories of farms in the program.

For the first time in recent years, the Republic has provided full compensation for the costs of artificial insemination of breeding stock in private farms.

Half of the costs are subsidized from the national budget, the other half-from the local budget.

And subsidies can be received by agricultural producers who received seeds from domestic distribution and breeding centers. From January to September 2019, farms in Kazakhstan purchased 1999 heads of cattle on loan and brought them at their own expense.

In addition, applications for the import of another 8.5 thousand heads have been approved and applications for 2.4 thousand heads are being considered. In Almaty and Akmola regions, four feedlots for 15.2 heads are being built at the expense of KazAgro's credit resources [4].

All the interests of Russia in buying meat from Kazakhstan are not in doubt. Every year, our Northern neighbor imports 7 million tons of meat from Brazil and South America.

The Russian Ministry of agriculture has developed a special program for selling meat from Kazakhstan. Now we can only supply this meat.

According to the national Ministry of agriculture, the state veterinary inspection of Kazakhstan is working to lift existing bans and restrictions on livestock products exported to Russia within the Customs Union.

However, an important result of this program is not only an increase in the export of Kazakh meat. For the country, it is important to develop the efficiency of related agricultural divisions, such as food production, processing of milk, meat, leather products, repair and maintenance of agricultural machinery.

Meat and meat products are the main element of the country's strategic food security structure. The main indicator that characterizes the standard of living of the nation is the indicator of consumption of livestock products per capita. In the historical conditions of the development of the meat industry of animal husbandry, the production of high-quality meat from breeding cattle in our country has not developed.

Kazakhstan has created favorable market conditions for the growth of meat exports to foreign markets. These are natural and competitive features of the country with the comfort of nature and an abundance of pastures (180 million US dollars). due to the proximity of the product sales market. In addition, animal husbandry is a traditional profession of the local population.

The development of export opportunities for the livestock meat industry will increase its economic attractiveness and diversify agribusiness.

The main goal of the export development of the livestock meat industry in the Republic of Kazakhstan is to increase labor productivity in the agro-industrial complex, improve the export potential of agricultural products in the overall export structure of the country.

Ways to increase cattle meat-focused direction and effectiveness of the management of the livestock meat industry for the development of export potential of the livestock meat industry in the Republic of Kazakhstan:

- development of the meat industry of animal husbandry on an industrial basis;
- improvement of the genetic capabilities of beef cattle and their productive qualities;
- introduction of innovative technologies in the meat industry of livestock;
- efficient use and final improvement of pasture and hay lands;
- development of the feed production system;
- development of infrastructure for meat production and processing;
- Improving the epizootic situation in the Republic of Kazakhstan;
- provision of state support to the meat industry of livestock;
- attracting private investment in the development of the meat industry of animal husbandry [2].

Table 1 - General provisions SWOT-analysis of export opportunities of the meat and livestock industry of the Republic of Kazakhstan

Strength	Weakness
<ul style="list-style-type: none"> - Climate conditions in the southern regions of Kazakhstan are favorable for pasture (low-cost) sheep farming; - In the Northern, Central, Western and Eastern regions, calculations show that pastures are not used for keeping livestock in winter; - Competitiveness of Kazakhstan's frozen meat in Russia 	<ul style="list-style-type: none"> - small-scale production, availability of MPC more than 80% of livestock; - reduction of acreage by forage crops, reduction of volumes and increase in price of compound feed; - registration of individual cases of dangerous diseases of livestock and poultry in certain regions; - low percentage of breeding and breeding animals; - high level of import substitution for meat products; - seasonal nature of livestock production.
Opportunities:	Threats:
<ul style="list-style-type: none"> - the expected increase in meat consumption due to the growth of the planet's population. In 2020, as the main consumer of Russian – Kazakh beef on the market, it imports 750 thousand tons of cows. «Neighborhood» with Russia and joining the Customs Union will increase the competitiveness of Kazakh beef. - non-use of genetic engineering in production, as well as attribution of meat production to the Halal standards, will allow bringing domestic meat products to the markets of Muslim countries, such as the United Arab Emirates and Saudi Arabia. 	<ul style="list-style-type: none"> -main importing countries: Argentina, Brazil, Australia, New Zealand high competition: these countries export frozen meat in large volumes, at lower prices from Kazakh producers. . - ban on the import of products related to particularly dangerous animal diseases.

Summary and Conclusion. The meat industry of animal husbandry in the Republic is not developed. Even in the context of the creation of the Customs Union, the government of the Republic has adopted a program for the development of beef cattle, aimed at its dynamic development and the creation of export forecasts.

If available, you need to be comprehensive and systematic to ensure the effectiveness of the tab market.

First, the need to create conditions for the development of the sheep industry in large and medium-sized commodity farms that have natural economic opportunities for growing highly productive livestock.

Secondly, the state must guarantee the sale of sheep products (meat, wool and sheepskin), ensuring high income for domestic producers.

Third, the growth of farmers ' incomes and reduced costs, as predicted in the final result, the creation of a marketing system and the sale of meat products without intermediaries.

These measures will increase production by 15-20 % per year and reduce the production cost of sales by 12-15 %.

The beef market in the country should be predictable with the growth of production and provision of cattle meat. As the experience of developed countries shows, this is a very high return. The level of profitability reaches 40-60 %.

Effective development of the meat market in the country, the processes of state regulation of its creation, in particular: uninterrupted provision of high-quality commodity products of the required

volume, the availability of economic opportunities that bring farmers high incomes at product prices and are accessible to all residents of the Republic.

А.Т. Кокенова¹, М.Ә. Есқара², Б.Б. Оразова³, А.А. Турлыбекова⁴, А.Б. Мухамедханова⁴.

¹ Халықаралық гуманитарлық-техникалық университеті, Шымкент, Қазақстан;

² Академик Ә. Әуатбеков атындағы Халықтар достығы университеті, Шымкент, Қазақстан;

³ Мирас университеті, Шымкент, Қазақстан;

⁴ Аймақтық әлеуметтік-инновациялық университеті, Шымкент, Қазақстан,

ЕТ НАРЫҒЫН ДАМУ – ЕЛІМІЗДІҢ СТРАТЕГИЯЛЫҚ АЗЫҚ-ТҮЛІК ҚАУІПСІЗДІГІ ҚҰРЫЛЫМЫНЫҢ АЖЫРАМАС БӨЛІГІ

Аннотация. Ет шағын кешені агроөнеркәсіп кешені және халықты азық-түлікпен қамтамасыз ету жүйесінде ерекше орын алады, демек, оның дамуы басым, тұрақты және серпінді болуы тиіс.

Ет және ет өнімдері халықтың күнделікті сұранысына ие тауарлары болып табығандықтан, АӨК-нің ет шағын кешені дамыту және азық-түлік нарығын кең ассортиментте, жоғары сапалы және қолайлы бағалар бойынша ет өнімдерімен қанықтыру барлық өңірлер үшін, әсіресе, өңірлік қажеттіліктерді қанағаттандыру үшін ғана емес, өңіраралық алмасу үшін әлеуетті мүмкіндіктерге ие адамдарға өзекті міндет болып саналады. Осындай аймақтардың бірі – Смоленск облысы – Ет және сүт мал шаруашылығы, Шошқа шаруашылығы, құс шаруашылығы дамыған өңір.

Ел экономикасының нарықтық қатынастарға көшуі көптеген экономикалық проблемаларды шиеленістірді. Олар агроөнеркәсіп өндірісінде аса өткір түрде көрінді. Нарықтық үдерістер бірқатар жағымсыз құбылыстармен – мал шаруашылығындағы өндіріс көлемінің бұрын-соңды болмаған құлдырауымен, мал басының қысқаруымен, жануарлардың құлауынан болған шығындардың өсуімен, АӨК шикізат секторы мен қайта өңдеу өнеркәсібі арасындағы қатынастардың теңгерілуімен, өзіндік құнның артуымен, тиімділіктің төмендеуімен, ет және ет өнімдеріне бағаның өсуімен және соның салдарынан азық-түлік нарығының баяу қалыптасуы мен тұрақсыз жұмыс істеуі; халықты отандық өндірістің етімен және ет өнімдерімен қанағаттанарлықсыз қамтамасыз ету; сапасы төмен ет өнімдерін жаппай импорттаумен; елдің азық-түлік қауіпсіздігіне қауіп төндірумен байланысты.

Елдің ет өнімдері ішкі кешенінде болған өзгерістерге статистикалық талдау жүргізілді.

Оның одан әрі дамуын анықтайтын негізгі үрдістер анықталды. Оларға бірінші кезекте келесілерді жатқызуға болады: өндірістің шоғырлануы және өнімді өндіру, қайта өңдеу және өткізу процестерінде тігінен интеграциялану, халық шаруашылықтарында өндірілген ет үлесінің төмендеуі, азық-түлік сауда желілерінің өсуі, бөлшек сауданың тауарлық ресурстарының құрылымындағы және халықтың ет тұтынуындағы артықшылық құрылымындағы өзгерістер. Жүргізілген талдау сала дамуының оң нәтижелері түпкілікті ет өнімдерінің өзіндік өндірісі тұтыну көлеміне және азық-түлік қауіпсіздігі өлшемдеріне жақындады деп пайымдауға негіз беретінін көрсетеді.

Жүргізілген зерттеу нәтижелері елдің АӨК-дегі құрылымдық өзгерістерді талдау және болжау кезінде пайдаланылуы мүмкін. Сондай-ақ мақалада саланың одан әрі дамуы екі үрдісті анықтайды: ет өндірісінің өсуі және халықтың сатып алу қабілетінің төмендеуі.

Түйін сөздер: экспорттық мүмкіндік, нарықтық конъюнктура, ішкі нарық, сыртқы нарық, ауыл шаруашылығы, инфрақұрылым, бәсекеге қабілетті өнім, инвестициялар, қарқынды даму, агроөндірістік кешен.

А.Т. Кокенова¹, М.А. Есқара², Б.Б. Оразова³, А.А. Турлыбекова⁴, А.Б. Мухамедханова⁴

¹ Международный гуманитарно-технический университет, Шымкент, Казахстан;

² Университет дружбы народов имени академика А. Куатбекова, Шымкент, Казахстан;

³ Университет Мирас, Шымкент, Казахстан;

⁴ Региональный социально-инновационный университет, Шымкент, Казахстан

РАЗВИТИЕ МЯСНОГО РЫНКА – НЕОТЪЕМЛЕМАЯ ЧАСТЬ СТРУКТУРЫ СТРАТЕГИЧЕСКОЙ ПРОДОВОЛЬСТВЕННОЙ БЕЗОПАСНОСТИ СТРАНЫ

Аннотация. Мясной подкомплекс занимает особое место в агропромышленном комплексе и в системе продовольственного обеспечения населения, следовательно, его развитие должно быть приоритетным, устойчивым и динамичным.

Поскольку мясо и мясопродукты являются товарами повседневного спроса населения, то развитие мясного подкомплекса АПК и насыщение продовольственного рынка мясопродуктами в широком ассортименте, высокого качества и по приемлемым ценам является актуальной задачей для всех регионов,

особенно для тех, которые обладают в наибольшей степени потенциальными возможностями не только для удовлетворения внутрирегиональных потребностей, но и межрегионального обмена. Одним из таких регионов является Смоленская область - регион в прошлом развитого мясного и молочного скотоводства, свиноводства, птицеводства.

Переход экономики страны на рыночные отношения обострил многие экономические проблемы. Наиболее остро они проявились в агропромышленном производстве. Рыночные процессы сопровождаются рядом негативных явлений - беспрецедентным падением объемов производства в животноводстве, сокращением поголовья скота, ростом потерь от падежа животных, разбалансированностью отношений между сырьевым сектором АПК и перерабатывающей промышленностью, повышением себестоимости, снижением эффективности, ростом цен на мясо и мясопродукты и как следствие - медленным становлением и неустойчивым функционированием продовольственного рынка; неудовлетворительным обеспечением населения мясом и мясопродуктами отечественного производства; массированным импортом мясных продуктов питания в значительной части низкого качества; угрозой продовольственной безопасности страны.

Проведен статистический анализ изменений, происшедших в мясопродуктовом подкомплексе страны.

Выявлены основные тенденции, определяющие дальнейшее его развитие. К ним в первую очередь следует отнести: концентрацию производства и вертикальную интеграцию в процессах производства, переработки и реализации продукции, снижение доли мяса, произведенного в хозяйствах населения, рост продовольственных торговых сетей, изменения в структуре товарных ресурсов розничной торговли и в структуре предпочтений населения в потреблении мяса. Проведенный анализ показывает, что позитивные результаты развития отрасли дают основания полагать, что собственное производство конечных мясных продуктов вплотную приблизилось к объемам потребления и критериям продовольственной безопасности.

Результаты проведенного исследования могут быть использованы при анализе и прогнозировании структурных изменений в АПК страны. Также в статье делается вывод о том, что дальнейшее развитие отрасли определяют две тенденции: рост производства мяса и снижение покупательной способности населения.

Ключевые слова: экспортные возможности, рыночная конъюнктура, внутренний рынок, внешний рынок, сельское хозяйство, инфраструктура, конкурентоспособная продукция, инвестиции, динамичное развитие, агропромышленный комплекс.

Information about authors:

Kokenova A.T., candidate of economic Sciences, docent, International Humanitarian and Technical University, Shymkent, Republic of Kazakhstan, E-mail: aiganymk7676@gmail.com, <https://orcid.org/0000-0002-8805-5924>

Eskara M.A., doctor of agricultural Sciences, Professor of the Department of Economics and law», People's Friendship University named after A. Kuatbekov, city of Shymkent, Republic of Kazakhstan;

Orazova B.B., candidate of economic Sciences, senior lecturer in Economics and management, Miras University, Shymkent, Republic of Kazakhstan;

Turlybekova A.A., – candidate of social Sciences, Senior Lecturer, Regional social innovation university, city of Shymkent, Republic of Kazakhstan;

Mukhamedkhanova A.B., master's degree in «Economics», Regional social innovation university, city of Shymkent, Republic of Kazakhstan, mukhamed_ainur@mail.ru

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