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INCREASING THE COMPETITIVENESS OF MEAT AND MEAT PRODUCTS AS A PRIORITY OF KAZAKHSTAN'S ECONOMIC POLICY

S.K. Mizanbekova, A.E. Kaiyrbaeva, M.Zh. Keneev*

Kazakh National Agrarian Research University, Almaty, Kazakhstan

**Corresponding author e-mail: kenlan@list.ru*

Abstract*. This article examines key directions for enhancing the competitiveness of meat and meat products within Kazakhstan's agro-industrial complex. Based on comparative, statistical, economic and systemic analysis, the study assesses the structural characteristics of the sector, production dynamics, investment activity and the degree of domestic demand satisfaction. Particular attention is paid to production and economic linkages along the value chain, the current state of livestock production and its transition to intensive technologies, as well as investment projects aimed at expanding meat-processing capacities. The analysis identifies structural and institutional constraints limiting the effective utilization of existing production potential, including weaknesses in the feed base, technological lag in processing, and insufficient coordination among market participants. The results demonstrate that improving competitiveness requires not only technological modernization and increased investment, but also the formation of a coherent economic environment across all stages of the production chain. Priority areas for sectoral development are substantiated, the implementation of which will contribute to higher value added, improved resource efficiency, stronger export orientation and enhanced national food security.*

Keywords*: agro-industrial complex; meat market; food security; investments; competitiveness.*

Main provisions. The core component of the meat and meat-products industry is agricultural organizations engaged in the production of cattle and small ruminants, including sheep-breeding enterprises, pig farms and poultry farms. Their development, based on stable and sustained growth, together with improvements across the entire production chain from primary output to the final consumer, will make it possible to meet domestic demand for meat and meat products.

Market saturation depends on stable supplies of meat and related products, which in turn are determined by the performance of the feed-production sector, increases in output volumes and nutritional value, as well as the rational use of feed resources. Further growth in productivity requires a solid feed base, the foundation of which is the feed industry within the agricultural sector. This industry must ensure the production of sufficient quantities of feed in accordance with feeding standards, with adequate levels of protein content.

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Introduction. In the context of escalating global and regional food challenges, ensuring the competitiveness of domestic meat products has become a matter of particular importance. For the Republic of Kazakhstan, which possesses substantial agricultural resources, the development of meat livestock production represents one of the key factors underpinning food security and sustainable economic growth. At the same time, the current structure of the meat market is characterized by a high degree of import dependence, limited processing infrastructure and an insufficient level of technological modernization.

The problem has become particularly acute against the backdrop of international restrictions, disruptions in logistics chains and heightened external economic instability, which have elevated import substitution to a state-level priority. Under these conditions, the competitiveness of meat products is determined not only by price factors but also by quality, availability, depth of processing and the extent of government support for the industry.

The relevance of this study is обусловлена the need to develop scientifically grounded approaches to improving the efficiency of the domestic meat sector under new socio-economic conditions. Insufficient adaptation to a changing market environment, as well as weak integration of producers into market and logistics chains, significantly constrains the sector's development potential.

The aim of the study is to analyze current trends in the development of Kazakhstan's meat market and to formulate recommendations for enhancing the competitiveness of domestic meat products within the framework of import-substitution policy.

Achieving this objective involves examining trends in meat production and consumption, identifying factors that hinder sectoral development, and determining potential directions for stimulating the production of competitive meat products at the national level.

Literature review. Issues related to enhancing the competitiveness of enterprises in the agricultural sector have consistently remained at the center of academic attention. This topic is particularly relevant for the meat-processing industry within the agro-industrial complex of the Republic of Kazakhstan, where sustainable development, operational efficiency and adaptation to changing market conditions are critical for ensuring food security and regional economic stability.

The scientific literature presents a variety of approaches to assessing competitiveness factors, modernization strategies and institutional mechanisms for supporting agricultural enterprises. In particular, R.S. Karenov, in collaboration with B.G. Nurpeisov and A.B. Toksambaeva, provides a comprehensive analysis of the current state of Kazakhstan's agro-industrial complex and identifies priority areas for its modernization. Their work emphasizes the development of a sustainable growth model that takes into account national specificities and global trends [1].

A substantial contribution to the theoretical and methodological understanding of agro-industrial development is made in the studies by I.G. Ushachev, A.V. Kolesnikov and V.V. Maslova. The authors highlight the importance of increasing labor productivity, improving resource efficiency, intensifying investment activity, introducing innovations, enhancing product quality and reducing production costs [2]. According to the researchers, these factors form the foundation for sustainable competitive advantages in an increasingly competitive environment.

A comprehensive approach to ensuring the sustainability of agricultural production is presented in the works of A.I. Altukhov, who examines structural risks and institutional barriers and proposes support measures aimed at long-term efficiency and reducing the sector's vulnerability to external shocks [3, 4]. His research offers valuable recommendations for transforming instruments of state agricultural policy and sectoral development strategies.

Significant progress in the development of methodological approaches to evaluating the effectiveness of state support in meat livestock production is reflected in studies conducted by a research team led by A.V. Bogoviz. The authors analyzes the impact of comprehensive government policy measures on sectoral dynamics, systematize factors influencing the effectiveness of subsidization and propose indicators for assessing the performance of relevant programs [5].

A comprehensive assessment of the current state and development potential of meat production and processing in Kazakhstan is presented in the study by G.U. Akimbekova, A.B. Baimukhanov, E.O. Kydyrbaeva and U.R. Kaskabaev, who identify key challenges and prospects for the industry's development [6].

Noteworthy contributions are also found in the research of G.K. Saparova, A.Zh. Kasenova, A.M. Nasyrova and R.E. Suleimanov [7]. Their findings offer both scientific and practical value, particularly with regard to assessing the current position of Kazakhstan's meat industry and identifying stages of its future development.

The studies by Zh.M. Nurkuzhaev and M.I. Sigarev [8] deserve special mention, as they analyze international experience in the implementation of state support measures for the agro-industrial complex.

Research into the dynamics and development trends of Kazakhstan's meat industry is further reflected in the works of B.Zh. Nurakhova, A.K. Burakhanova and G.K. Baizhaksynova [9], as well as A. Nasyrova et al. [10]. These authors make a significant contribution to understanding the challenges and development prospects of the meat-processing sector.

Issues related to improving the efficiency of the meat-processing industry and its positive impact on the national economy, including the development of related sectors such as agriculture, feed production, transportation and retail trade, job creation and expansion of the tax base, are examined in detail in the works of Kazakhstani economists, including G.K. Saparova, G.T. Sultanova and S.M. Kakharmanova.

Particular attention should be given to the study by G.K. Saparova and G.T. Sultanova [11], which outlines key theoretical and methodological approaches to agricultural development under contemporary economic conditions. Research by S.M. Kakharmanova focuses on food security issues, which play a central role in the country's socio-economic development and constitute an essential component of economic and national security [12].

The interaction between agricultural producers and meat-processing enterprises, as well as investment attraction in the agricultural sector, is analyzed in the works of Yu. Kozlov [13], T. Taipov [14], and Sh. Zhailaubayeva and Zh. Kazhieva [15].

Despite the substantial body of existing research, certain aspects of the competitiveness of Kazakhstan's meat industry, particularly under conditions of heightened economic turbulence and external risks, remain insufficiently explored. This highlights the need for further scientific investigation using integrated interdisciplinary approaches and an expanded empirical base.

Materials and methods. The study is grounded in the principles of modern economic theory, concepts of competitiveness and import substitution, as well as relevant hypotheses reflecting the specific features of the functioning of the agricultural sector. The information base of the research includes official statistical data published by the Ministry of Agriculture of the Republic of Kazakhstan, the Bureau of National Statistics of the Agency for Strategic

Planning and Reforms of the Republic of Kazakhstan, the National Bank of Kazakhstan, as well as industry analytical reviews and expert publications.

The analysis employs a methodological approach that combines systemic and logical-structural analysis with elements of quantitative assessment. The research is based on a retrospective examination of statistical data, which made it possible to identify key trends and changes in the development dynamics of the meat industry in recent years. Methods of analyzing absolute and relative indicators, as well as structural changes, were applied to trace the transformation of production and investment potential within the sector.

In addition, a comparison of actual performance indicators with expert assessments was conducted in order to identify deviations from target benchmarks and to evaluate the influence of external and internal factors on the efficiency of the meat sector. The study also relies on explanatory analysis aimed at identifying causal relationships between production volumes, levels of investment activity, the effectiveness of the raw-material base and the impact of government support instruments.

Results and discussion. The implementation of the state program Development of Meat Livestock Production for 2018-2027 places particular emphasis on increasing competitiveness through technological upgrading of meat-processing enterprises. This approach implies comprehensive modernization that encompasses all functional components of the production process. The development of competition in livestock production within the agro-industrial sector of the Republic of Kazakhstan is regarded as a critical factor of national food security.

From this perspective, stable growth in effective consumer demand for food products, including rising consumption of meat and meat products, serves as an important indicator of overall socio-economic well-being. Consequently, government authorities must focus not only on quantitative indicators of sectoral development, but also on qualitative parameters that determine the sustainability and competitiveness of the meat industry.

At present, domestically produced meat and meat products face a number of competitive constraints. These are primarily associated with insufficient technical equipment at processing enterprises, physical and moral depreciation of machinery, a limited number of applied research developments, and a lag in the production of environmentally oriented products due to the absence of relevant technological solutions. The analysis confirms that meat production and processing constitute one of the key sectors of agriculture as part of the national economic system and represent a fundamental pillar of food security.

In this context, it is essential to identify the main obstacles hindering the development of domestic meat production, including shortcomings in the regulatory framework and imperfections in the existing market-distribution infrastructure [16]. Further enhancement of competitiveness in the agro-industrial complex, particularly in livestock production, objectively requires active state involvement. This should primarily take the form of more targeted support instruments and more flexible regulation of market relations within the sector.

The relevance of state intervention is reinforced by the limited number of theoretical and applied studies devoted to economic regulation in agriculture, including meat production and processing. This underlines the need for deeper analytical work that takes into account the specific characteristics of the sector and the broader economic environment.

In recent years, the implementation of import-substitution policy and the National Project for the Development of the Agro-Industrial Complex of the Republic of Kazakhstan for 2021-2025 has resulted not only in quantitative growth, but also in qualitative transformations affecting the entire food-production vertical of the national economy [2, 9, 10].

International experience demonstrates that the marketing of livestock and poultry products relies on a variety of organizational market forms. These include contracting of livestock raw materials by industrial and trading companies within vertically integrated structures; wholesale market sales; distribution through cooperative marketing networks; deliveries based on intersectoral agreements; trading via commodity exchanges; and direct farm-gate sales [17].

The market for meat resources, as an integral component of the national market system, combines markets for production inputs and final consumer products. For meat-processing enterprises, livestock constitutes the primary raw material, while young cattle serve as the main input for feedlot operations. Final consumers include households, retail trade organizations, catering enterprises and other market participants. Among the most significant indicators used to assess the state of the sectoral market are market capacity, product differentiation, average price levels and price volatility, as well as the balance between supply and demand.

The foundation of the meat industry is formed by specialized enterprises engaged in the fattening of cattle, sheep, pigs and poultry. Only through their intensive development can an effective, integrated production and distribution chain be established, ensuring the full satisfaction of domestic demand for meat and processed meat products.

A strong feed base represents a key condition for the sustainable development and efficient functioning of the meat sub-sector. Its foundation lies in the production of sufficient volumes of feed in accordance with zootechnical feeding standards, with particular emphasis on protein-rich feed. In order to ensure a reliable feed supply, the area under fodder crops is planned to be expanded to 3.4 million hectares.

Despite such measures, the feed base remains a major limiting factor for the industry. Kazakhstan utilizes only about 30% of its vast pasture resources, and natural and climatic conditions (particularly frequent droughts), along with intensive use of pastures, have led to declining pasture productivity. Insufficient feed supply has driven up feed prices: according to official data, prices for fodder crops increased by 12.4%, dried peas by 8.4%, and sunflower seeds by 5.4%. The availability of feed relative to normative requirements is approximately 80% for roughage, 40% for succulent feed, and 50% for concentrated feed. Annual feed production is roughly half of the zootechnical norm, while sustainable livestock development also requires additional reserve stocks to mitigate unforeseen risks [9]. The severity of the feed shortage is reflected in a new approach to livestock subsidies that takes into account feed-crop yields and on-farm feed production when allocating state support. Moreover, a Roadmap for the Development of Feed Production 2022-2025 has been adopted, aimed at implementing comprehensive measures to strengthen the feed base.

Kazakhstan continues to demonstrate steady growth in the livestock sector. The year 2024 was particularly notable due to a substantial increase in beef exports. According to the Ministry of Agriculture of the Republic of Kazakhstan, beef exports increased by 1.5 times and exceeded 22.1 thousand tons. This result reflects the growing global demand for Kazakh meat products and confirms their high quality.

Gross livestock output in 2024 reached 3.3 trillion tenge, representing a 3.6% increase compared to 2023. Slaughter output across all categories rose by 4.3%, reaching 1.2 million tons. This was accompanied by a 4.4% increase in milk production, which amounted to 3.6 million tons. These results ensure the stable satisfaction of domestic demand and create additional potential for the expansion of foreign supplies. Alongside beef, lamb exports also demonstrated strong growth, increasing by 2.2 times to 17.6 thousand tons. This indicates an expansion of the export product range and Kazakhstan's intention to strengthen and diversify its presence in international agricultural markets, which is an important factor in the sustainable development of the agricultural sector.

Table 1 – Per capita consumption of meat and meat products

Product category	Q3 2024 (kg)	Q3 2023 (kg)	Change, %
Total meat and meat products	20.5	20.0	2.9
Beef	6.4	6.1	4.9
Lamb	1.5	1.6	- 6.1
Horse meat	1.4	1.5	- 4.0
Poultry	1.3	1.3	4.1
Pork	0.8	0.8	- 3.2
Semi-smoked sausage	1.0	1.0	3.7
Cooked sausage	0.7	0.7	0.0
Minced meat	1.9	1.8	3.0
Sausages (frankfurters, wieners)	0.6	0.5	17.3
Beef liver	0.2	0.2	13.5
Lard (pork fat)	0.04	0.05	- 6.4
Small-piece meat semi-finished products	0.04	0.04	- 2.3
Note: compiled by the authors based on data from [18]			

In the third quarter of 2024, average per capita consumption of meat and meat products in Kazakhstan amounted to 20.5 kg, which is 2.9 percent higher than in the corresponding period of 2023. The most pronounced increase was observed in beef consumption, which rose by 4.9 percent to 6.4 kg per capita. Among other types of meat, lamb (1.5 kg), horse meat (1.4 kg), poultry (1.3 kg) and pork (0.8 kg) remained the most widely consumed.

In the same period, Zhambyl Region recorded the highest level of meat consumption in the country, amounting to 23.6 kg per capita, representing an increase of 6.6 percent. High consumption levels were also observed in Akmola and Zhetysu Regions (23.5 kg each), Atyrau Region (22.9 kg), as well as Pavlodar and Karaganda Regions (22.8 kg each). The lowest per capita consumption was registered in Shymkent at 15 kg, despite a year-on-year increase of 5.1 percent. Relatively low levels were also observed in Turkestan Region (16.0 kg) and Kyzylorda Region (16.2 kg).

According to data from the Ministry of Agriculture of the Republic of Kazakhstan, Russia ranks first among CIS countries in terms of total meat consumption (11.8 million tons), followed by Ukraine (1.9 million tons) and Uzbekistan (1.5 million tons), while Armenia records the lowest volume at 165 thousand tons. Annual meat consumption in Kazakhstan reached 4 million tons. In terms of specific meat types, Uzbekistan leads CIS countries in per capita beef consumption, Belarus in pork and poultry consumption, and Turkmenistan in lamb and goat meat consumption.

Per capita meat consumption is the key indicator for cross-country comparison. According to this metric, Kazakhstan ranked third among CIS and Central Asian countries in 2022, with 70.2 kg of meat consumed per capita, behind Belarus (94.5 kg) and Russia (81.7 kg) (Table 2).

Table 2 – Per capita meat consumption by country

Country	Total consumption (thousand tons)	Per capita consumption (kg)	Beef	Pork	Poultry	Lamb and goat meat	Other meats
Belarus	901	94.5	22.6	36.4	35.1	0.1	0.2
Russia	11,824	81.7	12.5	29.5	34.2	1.5	4.0
Kazakhstan	1,362	70.2	24.8	8.0	21.8	8.5	7.0
Armenia	165	59.5	25.8	11.4	18.5	3.9	0.0
Turkmenistan	379	59.5	25.2	0.1	11.2	20.3	2.2
Ukraine	1,904	48.0	6.2	18.3	22.9	0.3	0.4
Uzbekistan	1,468	42.4	30.8	0.2	6.4	4.8	0.3
Azerbaijan	419	40.5	15.0	0.8	16.1	8.6	–
Kyrgyzstan	253	38.2	15.7	1.4	7.6	9.8	3.9
Tajikistan	357	35.9	24.9	0.4	2.8	7.7	0.2
Note: compiled by the authors based on data from [16]							

As of now, around 40 projects involving foreign investment, with a total value of about USD 4 billion, are underway or in preparation in Kazakhstan's agricultural sector. These initiatives cover both livestock production (including meat production and processing) and crop production (such as the establishment of intensive orchards, modular greenhouse complexes and tomato paste production). Kazakhstan also provides examples of successful investment projects. The company Kazbeef has established a fully integrated production cycle encompassing feed production, breeding of high-yield cattle and meat processing. Beef Export Group LLP, with the participation of Russian capital, implemented a project in Kostanay Region involving the construction of a meat-processing plant with a capacity of about 1,500 head of cattle per day.

In addition, several major projects are currently under development in the meat industry, including:

– the construction of a meat-processing facility in East Kazakhstan Region in cooperation with Cedar Meats (approximately USD 12 million investment);

– the opening of a meat-processing plant in Zhetysu Region with investment from the German company Baumann (approximately USD 30 million);

– the creation of a large-scale transhumant sheep-breeding megafarm in Karaganda Region (project cost around USD 50 million) to produce environmentally friendly meat;

– the planned establishment of an innovative, export-oriented livestock production complex in Almaty Region.

These initiatives are expected to expand processing capacities and strengthen Kazakhstan's position in the global meat market [9, 10, 11, 19]. Significant domestic investment has also been directed to the meat sector in various regions – for example, about KZT 11 billion in Turkestan Region, KZT 10.1 billion in Kostanay Region, and KZT 4.6 billion in East Kazakhstan Region.

The structure of capital investment in Kazakhstan's agro-industrial complex is illustrated in Figure 1.

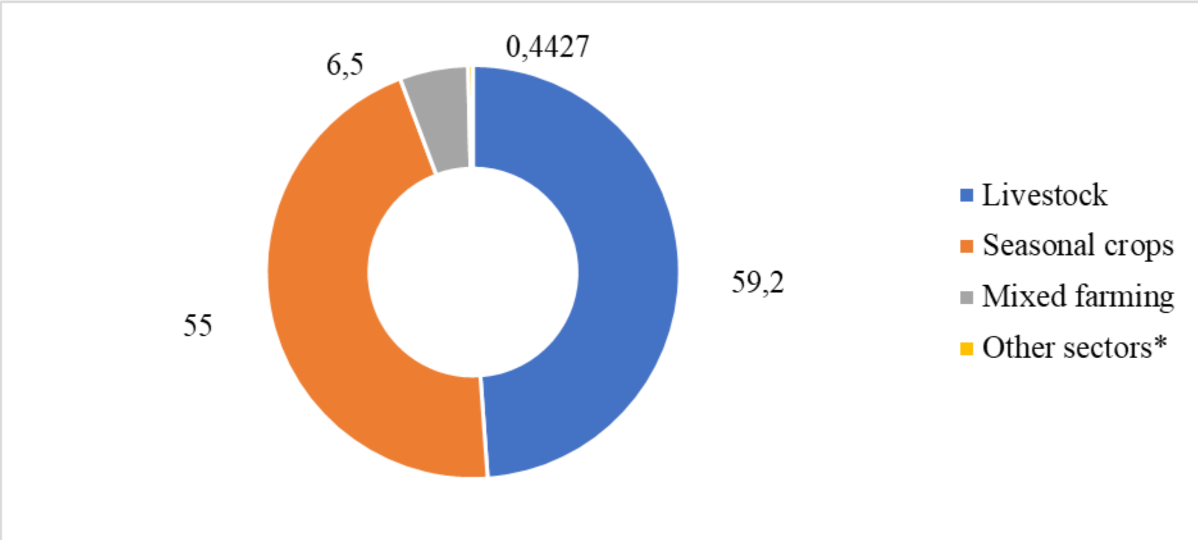

Figure 1 – Structure of Agricultural Investments in Q1 2024 (Billion KZT)

Note – Compiled based on source [18]

Livestock production attracted the largest share of total investment during the reporting period, amounting to KZT 59.2 billion. This figure exceeds the level recorded in January-March 2023 by more than 1.5 times. Consequently, the share of livestock-related investment in total agricultural capital expenditure increased from 26.5% to 48.2% over the year. The second-largest investment category was seasonal crop cultivation, which received KZT 55 billion; however, this represented a decrease of 37.4% compared to the same period of the previous year, reducing its share from 61.9% to 44.8%. Substantial funds were also allocated to mixed farming, amounting to KZT 6.5 billion (approximately half of the previous year's level), while other sectors (including crop production, hunting and related services) accounted for KZT 442.7 million [18].

The largest share of agricultural investment in early 2024 was concentrated in the livestock sector. During the first three months of 2024, the highest regional investment volumes were recorded in Pavlodar Region (KZT 24.4 billion), Akmola Region (KZT 24.0 billion) and North Kazakhstan Region (KZT 20.4 billion). By the end of 2025, North Kazakhstan Region is expected to attract KZT 147.8 billion in agricultural investment and implement 35 projects with a total value of KZT 72.6 billion. These projects include the construction of 11 dairy farms, the establishment of sheep-breeding and poultry enterprises, the development of horse breeding and the organization of new breeding centers. In addition, plans provide for the import of 2,300 head of pedigree livestock at a total value of KZT 3.5 billion.

To date, five new meat-processing projects with a combined annual capacity of 14.4 thousand tons have been commissioned. These include two major meat-processing plants: AizetFarms LLP, with a capacity of 20 thousand tons of meat per year, and Syr Marzhany LLP, with a capacity of 5 thousand tons per year.

Investment agreements have also been concluded between the Government of Kazakhstan and international corporations. These include a partnership with Tyson Foods focused on beef production, as well as cooperation with KS Genetics aimed at establishing a technologically advanced, export-oriented full-cycle meat production complex in Almaty Region.

At the current stage of development, Kazakhstan's meat-processing industry is gaining the capacity for more effective planning and control of livestock supplies for slaughter, as well as for the use of specialized transport for livestock delivery, which helps reduce logistical costs. The introduction of structured and deeper processing of raw materials at industrial enterprises makes it possible to expand product assortments and increase the output of finished products for retail chains. Strengthening cooperative linkages among all participants in the production and distribution chain ensures system balance and enhances the flexibility of technological and economic processes in response to market conditions.

Improving the efficiency of the sector further requires the implementation of large-scale breeding and selection programs and the formation of regional systems specializing in pedigree livestock. Such systems should integrate breeding farms and reproducers, centers for the production of genetic material, and stations for assessing livestock quality. The establishment of a network of breeding centers and reproducers will accelerate growth in animal productivity, improve qualitative characteristics in line with modern technological requirements, and enable the rapid introduction of scientific developments. This approach minimizes the time and financial costs that are inevitable when reproduction cycles are fragmented across individual farms within the unified technological chain of livestock and poultry production. It is also important to intensify the course towards the industrialization of livestock farming, which opens the way for continuous, innovation-driven meat production. Specialized enterprises, in contrast to diversified farms, demonstrate labor productivity gains of 150-200% and can reduce production costs by up to half of their nominal level.

Dynamic pig farming plays a particularly important role in the development of the meat sector, as it is one of the fastest-growing branches of livestock production within the agricultural economy. Alongside the establishment of high-intensity industrial pig farms in densely populated regions, greater use should be made of the potential to increase pork production within auxiliary farms, farmer cooperatives and individual household farms.

Expanding sheep meat production requires the formation of an industrial base for the adoption of modern technologies. In steppe and semi-desert regions, mechanized shepherding teams can serve as a key organizational form. To optimize herd reproduction, it is advisable to increase the share of breeding ewes in meat-and-fat sheep farming to approximately 70%. Their intensive use will make it possible to organize specialized lamb fattening at large-scale and inter-farm facilities, with lambs then marketed for meat at 9-10 months of age once a live weight of up to 50 kg is reached.

A number of successful large-scale enterprises in the meat industry illustrate the progress being made. One example is Baiserke-Agro LLP in Almaty Region, where a modern meat-processing complex specializing in block meat and large-cut portions with vacuum packaging has been constructed (designed production capacity of 10 tons per shift, or roughly 2,500 tons per year). Baiserke-Agro is equipped with processing equipment supplied from Turkey, the Czech Republic and Italy. High-capacity smoking chambers and roasting units operate without the use of liquid smoke, and the company's products fully comply with stringent Islamic halal standards.

At the initial stage of operation, the enterprise plans to procure additional cattle from private farms and household producers in order to gradually establish its own raw-material base from existing livestock. The company intends to market its products not only within Kazakhstan, but also to distant foreign markets. In addition, Baiserke-Agro has organized research teams to develop and implement innovative projects in meat and dairy cattle breeding, sheep farming and productive horse breeding. Milk production has also been upgraded with technical support and equipment from manufacturers in Sweden and the Netherlands.

A new robotized dairy farm designed for 800 head of cattle will become the largest of its kind in the republic. A similar facility, on a smaller scale, is already operating in East Kazakhstan Region. This complex, which includes a training center, has no analogues either domestically or internationally. The herd supplying raw materials for the facility consists of high-bred dairy cows, with feed for the herd sourced from 2,500 hectares of cropland.

Each year, Baiserke-Agro supplies approximately 1,800 tons of dairy products and 1,250 tons of meat and meat products to the consumer market of Kazakhstan. The company also cultivates grain crops on 3,600 hectares, applying innovative subsurface drip irrigation systems on 500 hectares. This example demonstrates the feasibility of operating a modern agricultural enterprise to support the development of the food-production complex in the vicinity of the Almaty metropolitan area.

The Baiserke-Agro meat-processing plant itself is a multifunctional complex specializing in the production of meat products. The company is one of the leading exporters of meat from Kazakhstan to international markets. Daily output amounts to about 30 tons of beef and 15 tons of lamb. The facility is equipped with refrigeration and freezing systems with a total one-time cooling and storage capacity of up to 120 tons, as well as production units capable of deboning and deep-processing up to 25 tons of meat products per day.

Industrial and innovation-driven development and investment policy

- Promoting technological modernization and attracting investment in meat production and processing.

Increasing labor productivity and exports of processed products

- Improving efficiency and expanding the international market presence of Kazakh meat products.

Ensuring food security and a stable raw-material base

- Strengthening livestock breeding and feed production to ensure a reliable supply of raw

Expanding processed output and competitive product range

- Deepening processing activities and enhancing product quality to meet market demand.

Innovative development of livestock, feed, and pasture systems

- Adopting advanced practices in animal husbandry and pasture management to boost output.

Improving transport connectivity and logistics infrastructure

- Enhancing logistics infrastructure to reduce costs and facilitate efficient distribution.

Figure 2 – Priority Areas for Enhancing the Competitiveness of Kazakhstan's Meat Sector

Note: compiled by the authors

The meat-processing plant is certified in accordance with international quality and food safety standards, including ISO 22000:2019, HACCP (1179-2003), ISO 9001:2016, ISO 14001:2016, ISO 45001:2019, as well as halal certification for both domestic and international markets. Baiserke-Agro actively exports meat products to the United Arab Emirates, Saudi Arabia, Qatar, Kuwait and Iran. It should be noted that China has also lifted restrictions on imports of livestock products from Kazakhstan.

Government authorities are actively engaged in developing a project portfolio aimed at ensuring the sustainable development of the livestock sector. Within the framework of initiatives to expand export potential in beef production, a breeding nucleus has been established and qualitative characteristics of livestock have been improved through the importation of Angus and Hereford breeds, with total investments approaching USD 1 billion [16].

On the basis of the conducted research, we identified a set of priority areas aimed at enhancing the competitiveness of Kazakhstan's meat and meat-processing sector (Figure 2).

These priority areas reflect the systemic challenges and development opportunities within the industry and serve as strategic directions for its sustainable growth.

Conclusion. The conducted study confirms that Kazakhstan's meat-processing industry possesses substantial yet underutilized potential to strengthen its position in both domestic and international markets. An analysis of production dynamics, investment trends, and systemic constraints shows that, despite structural consolidation and integration into the agro-industrial complex, the sector continues to face challenges associated with a low level of utilization of existing capacities.

The findings indicate that enhancing competitiveness requires not only technological modernization and increased investment inflows, but also the formation of a coherent economic environment across all stages of the production chain – from livestock breeding and feed supply to processing and logistics. Particular emphasis should be placed on expanding the scale of specialized industrial enterprises, optimizing the feed base, and increasing product value added through deeper processing.

Based on the research results, priority directions for improving the efficiency and competitiveness of the sector were identified. Their implementation will enable more effective use of production resources, stimulate the output of value-added products, and support the achievement of both domestic demand and export objectives. These strategic measures are essential for ensuring the sustainable development of the meat-processing industry and strengthening Kazakhstan's national food security.

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ЕТ ПЕН ЕТ ӨНІМДЕРІНІҢ БӘСЕКЕГЕ ҚАБІЛЕТТІЛІГІН АРТТЫРУ - ҚАЗАҚСТАННЫҢ ЭКОНОМИКАЛЫҚ САЯСАТЫНЫҢ БАСЫМДЫҒЫ

С. К. Мизанбекова, А.Е.Қайырбаева, М. Ж. Кенеев*

Қазақ ұлттық аграрлық зерттеу университеті, Алматы, Қазақстан

Түйін. *Мақала Қазақстанның агроөнеркәсіптік кешеніндегі ет және ет өнімдерінің бәсекеге қабілеттілігін арттырудың негізгі бағыттарына арналған. Салыстырмалы, статистикалық, экономикалық және жүйелік талдау негізінде саланың құрылымдық ерекшеліктері, өндіріс серпіні, инвестициялық белсенділік және ішкі сұранысты қанағаттандыру деңгейі бағаланады. Құн тізбегі бойындағы өндірістік-экономикалық байланыстарға, мал шаруашылығының жай-күйіне және оның қарқынды технологияларға көшу деңгейіне, сондай-ақ ет өңдеу қуаттарын кеңейтуге бағытталған инвестициялық жобаларға ерекше назар аударылады. Саланың өндірістік әлеуетін тиімді пайдалануды шектейтін құрылымдық және институционалдық тосқауылдар, оның ішінде жемшөп базасының жеткіліксіздігі, қайта өңдеу саласындағы технологиялық артта қалушылық және нарық*

қатысушылары арасындағы үйлестіру деңгейінің төмендігі анықталған. Бәсекеге қабілеттілікті арттыру тек технологиялық жаңғырту мен инвестициялық белсенділікті күшейтуді ғана емес, сонымен қатар өндірістік тізбектің барлық кезеңдерін қамтитын үйлесімді экономикалық ортаны қалыптастыруды талап ететіні көрсетілген. Саланың дамуының басым бағыттары негізделген, олардың іске асырылуы қосылған құнның өсуіне, ресурстарды пайдалану тиімділігінің артуына, экспорттық бағдардың күшеюіне және ұлттық азық-түлік қауіпсіздігінің нығаюына ықпал етеді.

***Түйінді сөздер**: агроөнеркәсіптік кешен, ет нарығы, азық-түлік қауіпсіздігі, инвестициялар, бәсекеге қабілеттілік.*

ПОВЫШЕНИЕ КОНКУРЕНТОСПОСОБНОСТИ МЯСА И МЯСОПРОДУКТОВ – ПРИОРИТЕТ ЭКОНОМИЧЕСКОЙ ПОЛИТИКИ КАЗАХСТАНА

С.К. Мизанбекова, А.Е.Кайырбаева, М.Ж. Кенеев*

Казахский национальный аграрный исследовательский университет, Алматы, Казахстан

***Резюме.** В статье рассматриваются основные направления повышения конкурентоспособности мяса и мясопродуктов в агропромышленном комплексе Казахстана. На основе сравнительного, статистического, экономического и системного анализа оцениваются структурные характеристики отрасли, динамика производства, инвестиционная активность и уровень удовлетворения внутреннего спроса. Особое внимание уделяется производственно-экономическим связям вдоль цепочки создания стоимости, состоянию животноводства и степени его перехода на интенсивные технологии, а также инвестиционным проектам, направленным на расширение мясоперерабатывающих мощностей. Выявлены структурные и институциональные ограничения, сдерживающие эффективное использование производственного потенциала отрасли, включая недостаточность кормовой базы, технологическое отставание переработки и низкий уровень координации между участниками рынка. Показано, что повышение конкурентоспособности требует не только технологической модернизации и роста инвестиционной активности, но и формирования согласованной экономической среды на всех этапах производственной цепочки. Обоснованы приоритетные направления развития отрасли, реализация которых будет способствовать росту добавленной стоимости, повышению ресурсной эффективности, усилению экспортной ориентации и укреплению национальной продовольственной безопасности.*

***Ключевые слова:** агропромышленный комплекс, рынок мяса, продовольственная безопасность, инвестиции, конкурентоспособность.*

Information about the authors:

***Mizanbekova Salima Kaspievna** – doctor of Economics, Professor, Kazakh National Agrarian Research University, Almaty, Kazakhstan, e-mail: salima-49@mail.ru, ORCID ID: https://orcid.org/0000-0002-7602-9710*

***Kaiyrbaeva Ainur Yeltayevna** – candidate of Economics, Kazakh National Agrarian Research University, Almaty, Kazakhstan, e-mail: ainur_eltaevna@mail.ru, ORCID ID: https://orcid.org/0000-0002-2435-1636*

Margulan Zhumagalievich Keneev – PhD student, Kazakh National Agrarian Research University, Almaty, Kazakhstan, e-mail: kenlan@list.ru, ORCID ID: https://orcid.org/0000-0003-1325-8548*

Авторлар туралы мәліметтер:

***Мизанбекова Салима Каспиевна** – экономика ғылымдарының докторы, Ресей Федерациясы, профессор, Қазақ ұлттық аграрлық зерттеу университеті, Алматы, Қазақстан, e-mail: salima-49@mail.ru, ORCID ID: https://orcid.org/0000-0002-7602-9710*

***Қайырбаева Айнұр Елтайқызы** – экономика ғылымдарының кандидаты, профессордың міндетін атқарушы, Қазақ ұлттық аграрлық зерттеу университеті, Алматы, Қазақстан, e-mail: ainu_eltaevna@mail.ru, ORCID ID: https://orcid.org/0000-0002-2435-1636*

Кенеев Марғұлан Жұмағалиұлы* *- PhD докторант, Қазақ ұлттық аграрлық зерттеу университеті, Алматы, Қазақстан, e-mail: kenlan@list.ru, ORCID ID: https://orcid.org/0000-0003-1325-8548*

Сведения об авторах:

Мизанбекова Салима Каспиевна *– доктор экономических наук, профессор, Казахский национальный аграрный исследовательский университет, Алматы, Казахстан, e-mail: salima-49@mail.ru, ORCID ID: https://orcid.org/0000-0002-7602-9710*

Кайырбаева Айнур Елтаевна – *кандидат экономических наук, Казахский национальный аграрный исследовательский университет, Алматы, Казахстан, e-mail: ainur_eltaevna@mail.ru, ORCID ID: https://orcid.org/0000-0002-2435-1636*

Кенеев Маргулан Жумагалиевич* – *докторант PhD, Казахский национальный аграрный исследовательский университет, Алматы, Казахстан, e-mail: enlan@list.ru, ORCID ID: https://orcid.org/0000-0003-1325-8548*

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