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ПЕДАГОГИКАЛЫҚ УНИВЕРСИТЕТІНІҢ

# Х А Б А Р Л А Р Ы

## ИЗВЕСТИЯ

НАЦИОНАЛЬНОЙ АКАДЕМИИ НАУК  
РЕСПУБЛИКИ КАЗАХСТАН

КАЗАХСКИЙ НАЦИОНАЛЬНЫЙ  
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## NEWS

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## NEWS

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Zh.Sh.Kydyrova<sup>1</sup>, E.Z.Onlasynov<sup>1</sup>, A.U.Abishova<sup>2</sup>, A.A.Shadieva<sup>1</sup><sup>1</sup>M.Saparbaev South Kazakhstan Humanitarian Institute;<sup>2</sup>M.Auezov South Kazakhstan State University, Shymkent, Kazakhstan**RESEARCH OF THE SITUATION IN THE MARKET OF MILK AND DAIRY PRODUCTS OF THE SOUTH KAZAKHSTAN REGION**

**Abstract.** The developing situation in the market of dairy products imposes essentially new requirements to marketing activity, adoption of administrative decisions, the organizations of production and realization. Research objective is studying of features of the market of dairy products and on its basis development of recommendations for improvement of forecasting of demand and increase in consumer qualities of the studied production. Also it was supposed to conduct a research of potential opportunities of subjects of the market of dairy products in SKR with application of modern methods and the strategy of management of consumer demand, to develop suggestions for improvement of the mechanism of management of consumer demand. For achievement of a goal tasks to analyze not only internal specifics of the food market, but also the external factors which are directly influencing these processes were set; to generalize experience of foreign countries in questions of management of market demand; to carry out the express analysis of the market of milk and dairy products in Kazakhstan and SKR; to offer the directions of development of the market of milk and dairy products. Objects of research are the economic relations arising during interaction of supply and demand on milk and dairy products. An object of research are factors and tendencies in development of the market of milk and dairy products.

**Key words:** consumers, demand, price, marketing, dairy products.

**Introduction.** 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, domestic production capabilities and development of interterritorial links. Accounting of all these factors is a difficult, but necessary task of investigating of this problem.

Existence of basic conditions, opportunities and competitive environment for production of goods and services; economic freedom of producers in development of production, processing and product sales; competitive production and demand for her; effective tax, customs and price policy, inflation, purchasing power of the population and other factors is a necessary condition for development of the domestic food market.

Evolutionary development of world and domestic market of foodstuff is impossible without the general and specific factors of scientific and technical progress, without scientific knowledge in the field of production of new types of food, their influence on the environment and the person [1].

**Main part.** The following factors are very important for the development of the market of milk and dairy products in the regionare:

1. Formation of the organized sales channels of milk and dairy products focused on attraction in a dairy and grocery subcomplex of third-party investors and replenishment of the regional budget.
2. The increase in competitiveness of the made production allowing to expand her sales markets.
3. Increasing volums of production of milk and dairy products. The development of the regional food market depends on regional economic integration.

For implementation of effective integration process it is necessary to solve the following problems:

- creation and signing of the regional agreement on economic integration, including food market;
- stimulation of development of a product of exchange for satisfaction of demand of the parties participating in him;

- the coordinated formation of infrastructure of the market;
- implementation of joint projects, creation of new productions.

Today, in the conditions of extreme dependence of the economy on the domestic and foreign policy of the state, on the emerging international relations; in conditions of shortage of means of production and at the same time the need to increase production, the role of the state in regulating these aspects and in the development of the market is undeniable, it is argued that the key role belongs to the state.

Pursuing of the purpose of assessment of the directions of studying of the market of dairy products, let us turn to the approach of M. Porter [2] which in the work "Competitive Strategy" has allocated five factors of the competition in branch therefore the model of five forces of Porter defining the competition in branch has been formulated:

1) assessment of influence of suppliers of milk, consideration of tendencies by the form activity "cultivation of cattle" and assessment of prospects of growth (decrease) of volumes of production.

2) assessment of the standard of living of the population; so, growth of welfare will have a positive impact on its purchasing power and, as a result, will lead to increase in demand for production of processing of milk.

3) studying of level of the competition of foreign commodity producers; so, decrease in a fiscal barrier will lead to penetration on domestic market of cheap foreign production which will jeopardize processing of milk as a kind of activity.

4) assessment of a possibility of emergence in the market of food which will replace dairy products. Advertizing, globalization and shifts in mass consciousness lead to changes of preferences of buyers that leads to emergence of new types of goods not characteristic of the country.

5) studying of the competition intra the kind of activity, as at the mesolevel (penetration of production into the neighboring regions), and at the macrolevel (replacement of one commodity producers by others in one region).

Studying of the works concerning questions of influence of various factors on the formation and development of the regional food market made it possible to determine the list of factors that have the greatest impact on the supply and demand of milk and dairy products on the market, taking into account its division into the rural and urban dairy market, agglomeration of economic factors on demand in the urban agglomeration has a positive trend, in rural - negative [3].

The factors exerting impact on demand:

1) Organizationally - economic factors: range of dairy products, quality of goods, advertizing, season of sales;

2) Socially - economic factors: number of consumers, income of consumers, change of number of consumers and their income;

3) Psychological factors: tastes, expectations of consumers, usefulness of a product, culture of food;

4) Foreign trade factors: change in price of finished goods, change of the assortment of dairy products.

The factors exerting impact on the offer:

1) Socially - economic factors: existence of demand for finished goods, the change in price of the competing goods, entry into the market of new firms;

2) Political factors: policy and economy of the state;

3) Foreign trade factors: the change in price of the competing goods, change of the range of finished dairy products;

4) Organizationally - economic factors: price of goods, change of costs of production and level of proceeds from sales of goods;

5) Resource factors: existence of labor, monetary and material resources, presence of capacities, existence of a transport infrastructure.

Tastes of consumers and the culture of consumption are preferences and beliefs in consumer values and norms, this is the attitude of a person to a product and its properties, which ultimately forms consumer habits of the population. To assess the consumer preferences of the urban agglomeration population and

the rural population of the South Kazakhstan region, a survey was conducted of a sample of respondents living in the region. The survey revealed differences in demand for dairy products of these groups. The study revealed that the rural population prefers traditional dairy products, such as sour cream, milk, kefir, while the inhabitants of the urban agglomeration are adherents of dietary dairy products, products with the use of various additives, yoghurts, cheeses, etc.

The group of foreign trade factors include such as the change in the price of goods, assortment. Consumers at different subspecies of the milk and dairy products market in the South Kazakhstan region will react differently to the changes of the specified factors. So, the growth in prices for dairy products will negatively affect demand, primarily in the rural market, since the level of income of rural residents is lower than that of the urban agglomeration population, so the elasticity of the goods is higher here. The influence on such subspecies of the dairy market of such factor as the change of the assortment, the greatest influence has in the market of city agglomeration. Here is looked through direct dependence between a variety of the offered production, quantity of novelties and level of demand on her.

In the rural market of dairy products, thanks to preference among the population of traditional production, and also possibilities of acquisition of the natural dairy products which haven't undergone deep processing in personal subsidiary farms, the lack of a big variety of production in outlets will exert the minimum impact on consumer demand considerably, existence of the branches providing production, delivery, exchange, realization of finished goods contributes to the effective development of the market of milk and dairy products. In the market of city agglomeration infrastructure is developed more than on rural, it and has caused concentration of processing facilities near the regional center.

The great scientific and practical interest for formation and adjustment of really market relations in the cluster system of a meat and dairy subcomplex of agrarian and industrial complex of the Republic of Kazakhstan represents detailed consideration and the analysis of wealth of experience of a number of foreign countries with advanced production of meat and quality dairy products and the widest range – the USA, Germany, France, etc. In particular, from the point of view of expedient acceptable transferring to practice of cluster system of the enterprises of Kazakhstan questions of the organization, improvement of development of production, processing, transportation and realization of milk and dairy products have the greatest value, i.e. in subsector where are most fully focused the most burning issues of a meat and dairy complex which solution is especially relevant during the present period [4].

In foreign countries the dairy cattle breeding is specialized branch at well developed meat cattle breeding. The general tendency of the last years all economically developed countries is their enlargement and reduction of number [5].

According to the International Dairy Federation (IDF) in 2016, the world produced 473.2 million tons of cow's milk. The largest producers of milk are the EU countries - 144 million tons, the USA - 91 million tons, India - 58 million tons, China 35 million tons, Russia - 31 million tons. (Table 1). These countries provide 2/3 all of the world's milk production.

In world production of milk there was a tendency to increase in production from 0,7 in EU countries up to 12,4% in China, at the same time in Russia production of milk was reduced by 0,8%. Increase in production of milk is also observed in Iran, Indonesia, Argentina, Brazil which is provided with increasing the productivity of milking flocks and increasing in a livestock of cows. In the USA increase in number of the cattle has happened in the last 5 years for 2,4% or 2,3 million heads.

Table 1 - Milk production in the world

Countries	Milk production, thousand tonnes			
	2014	2015	2016	2016y. in% to 2014
EU countries	142920	143750	143850	100,7
USA	88978	90824	91444	102,8
India	53500	55500	57500	107,5
China	30700	32600	34500	112,4
Brazil	30715	31490	32380	105,3
Russia	31646	31917	31400	99,2
Ukraine	10804	11080	11160	103,3
Belarus	6505	6767	6655	102,3
Kazakhstan	5233	4804	4891	93,4

Source: *Monitoring of the world market and dairy products / T.B. Ogneva, M.V. Aleksandrova // Economics, sociology and law. - 2016. - № 3.*

Milk production in the member states of the Customs Union in 2016 was distributed as follows: Russia - 31 million tons, Kazakhstan - 4.9, Belarus - 6.7 million tons, however the analysis of production showed that per capita the Republic of Belarus will occupy the leading positions - 704.1 liters of milk per person, Russia - 219.3 liters, in Kazakhstan - 299.4 liters. [6].

In 2016 across the Republic of Kazakhstan are noted increase in production of milk in a solid form for 11,2%, cheese and cottage cheese for 35,5% . In too time, the volume of production of processed liquid and cream (-4,1%) and butter and spread (-11,9%) decreases in relation to previous year (Table 2).

Table 2 - Production of milk and dairy products

№	Name of food	In fact, for			Index physical volume of industrial output, 2016 in % by 2014.
		2014	2015	2016	
1	Milk in solid form, tons	2 402	3 080	3 425	111,2
2	The milk processed liquid and cream, tons	440 347	472 866	453 646	95,9
3	Butter and spreads (pastes) dairy, tons	88,1	18 794	16 564	88,1
4	Cheese and cottage cheese, tons	135,5	22 211	30 104	135,5
5	Other dairy products, tons	100,3	208 247	208 856	100,3

Source: Committee on statistics of the Ministry of national economy of RK

The leader in volume of production of milk of all types in 2016 are East Kazakhstan (792,4 thousand tons), Southern Kazakhstan (710,6 thousand tons) and Almaty (684,2 thousand tons) areas. Significant growth in production is noted in the North Kazakhstan region for 6,5% from 473,3 to 504,1 thousand tons, the Karaganda region for 5,2% from 388,4 to 408,7 thousand tons and the Kostanay region for 4,5% from 359,6 to 375,7 thousand tons (Table 3).

Table 3 - Production of milk of all types in the context of regional centers and cities of Astana and Almaty, thousand tons

	2014	2015	2016	Comparison 2016 to 2014, in %
Republic of Kazakhstan	4 888,0	5 067,90	5 182,40	2,3
Akmola	328,3	351,4	360,6	2,6
Aktobe	299,9	301,8	302	0,1
Almaty	670,2	672,2	684,2	1,8
Atyrau	55,8	65,7	58,8	-10,5
The West Kazakhstan	223,7	224,6	226,4	0,8
Jambyl	281,8	290,1	294,7	1,6
Karaganda	369,7	388,4	408,7	5,2
Kostanay	338,5	359,6	375,7	4,5
Kyzylorda	77,0	85,8	87,5	2,0
Mangystau	4,1	8,8	9,2	4,5
South Kazakhstan	671,6	699,9	710,6	1,5
Pavlodar	349,4	355	361,7	1,9
North-Kazakhstan	458,5	473,3	504,1	6,5
East Kazakhstan	757,0	778,1	792,4	1,8
Astana city	2,2	1,7	0,6	-64,7
Almaty city	0,3	11,5	5,2	-54,8

Source: Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

Leaders for production of the processed liquid milk and cream - North Kazakhstan (111 856 tons), Almaty (80 397 tons) and Akmola (74 024 tons). A significant increase in the production of processed liquid milk and cream was observed in the Pavlodar region by 30.3% from 11 848 tons to 15 441 tons, Kyzylorda region by 23.5% from 4 130 to 5 099 tons, South Kazakhstan region by 15.3% from 17 629 to 20 328 tons and Zhambyl region by 8.7% from 8 574 to 9 323 tons.



The volume of milk production in solid form increased significantly in Kostanay region by 28.5% from 421 to 541 tons and Pavlodar region by 17.8% from 910 to 1,072 tons. The leaders in the production of dry milk are North Kazakhstan (1 361 tons) and Pavlodar region (1,072 tons).

At the first place in the production of butter is Almaty (5,388 tons), then Kostanay region (3,460 tons). The considerable gain of the volume in the production of butter was noted in the following areas: South Kazakhstan by 183.3% from 36 to 102 tons, Akmola region by 61.9% from 451 to 730 tons, Pavlodar by 26.5% from 637 to 806 tons and Zhambyl region by 12.5% from 1 168 to 1 314 tons.

In comparison with previous year the volume of the exported milk and cream (non-concentrated and without added sugar or other sweetening substances) have considerably decreased by 64% from 20 858,5 tons to 7 550,2 tons. The main volume of export went to the Russian Federation – 19 794,1 tons (58%), further it has decreased by 67% up to 6 583,1 tons. In too time the volume of import has increased by 10% from 42 153,0 tons to 46 248,4 tons (Figure 1).

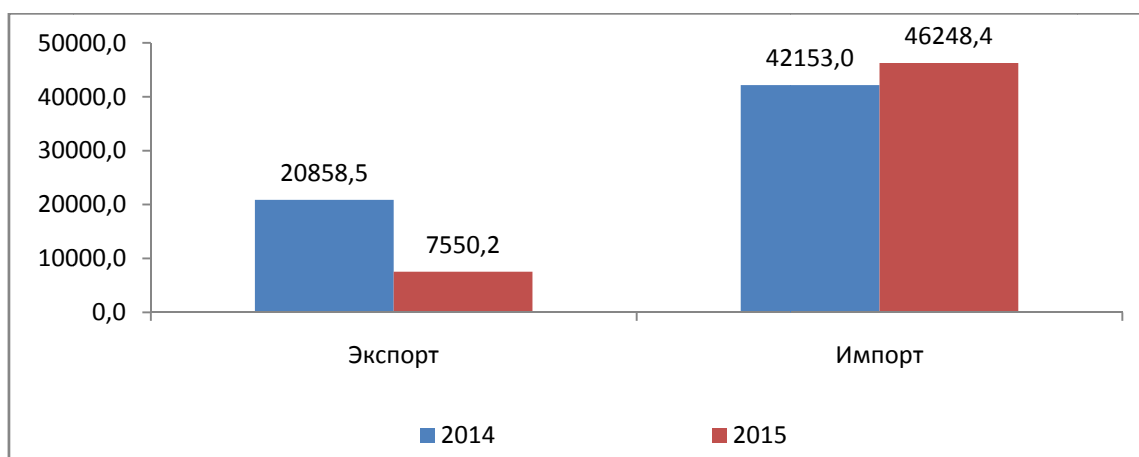


Figure 1 - Export and import of milk and cream, tons

Source: Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

One of the main importers of milk and cream (non-concentrated and without added sugar or other sweetening substances) is the Russian Federation - 26,889.2 tons (58%). Also, significant volumes of imports came from Kyrgyzstan - 15 333.5 tons (33%). The volume of imports from Belarus amounted to 3,374.9 tons (7%). The main importing countries to Kazakhstan are Russia - 14,022.1 tons (34%) and Belarus - 12,476.9 tons (30%). Also, the country receives products from Ukraine (9%), France (6%), Lithuania (5%), Poland (5%) and other countries (Figure 2).

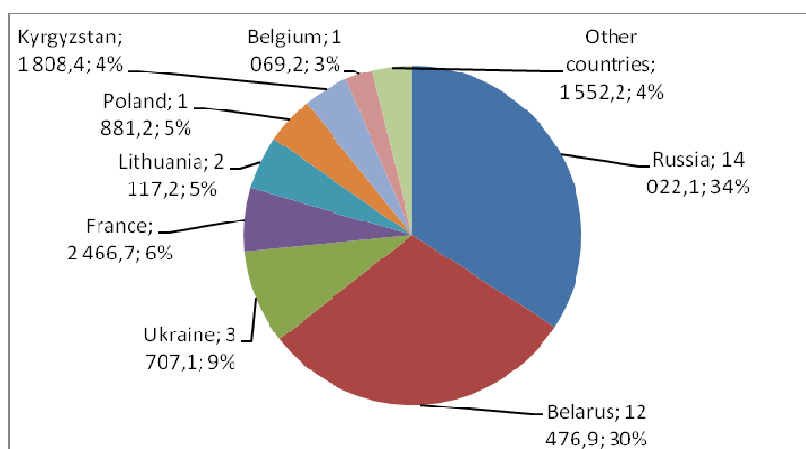


Figure 2 - Major importing countries of milk and cream

Source: Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

Sharp increase in volumes of export of butter and the other fats and oils made of milk (including dairy pastes) for 2 800% from 106,9 tons to 3 099,7 tons is observed. The main volume of export was to the Russian Federation, in 2016 sharp increase for 2 536% from 105,8 tons to 2 789,2 tons was observed.

The volume of imports of butter and other fats and oils made from milk (including milk pastes), on the contrary, decreased by 27% compared to 2014, from 59,737.1 tons to 41101.1 tons. The main countries importing this product are Russia - 2,710.9 tons (36%), Ukraine - 1,258.2 (17%), Belarus - 1,004.2 tons (13%) and France (839.6 tons (11%). This product is also imported from Kyrgyzstan (7%), Lithuania (6%) and other countries [7].

The volume of export of cheeses and cottage cheese has increased by 124% from 646,0 tons to 1 446,8 tons. It is caused by the fact that the main growth of volume of the exported production is the share of the Russian Federation, so sharp increase from 358 tons to 1 094,3 tons has made 206%.

Production of milk and dairy products is one of the most important sectors of the food industry of the Southern Kazakhstan. Consumption of milk and dairy products directly influences the state of health of the nation: it is well-known that milk is one of basic food, an important component of a healthy diet of people of all age.

Now in the domestic market there was rather steady tendency of stable increase in production of milk and dairy products (Table 4).

Table 4 - The output of dairy products in SKR

Name	2012	2013	2014	2015	2016	2016 in % to 2012
Milk, tons	662 109	660 673	679 542	699 922	710 642	107,3
including:						
Milk (Cow)	650 898	653 014	671 610	692 516	703 106	108,0
Goat	1 144	653	756	728	726	63,5
Mare's	7 771	5 687	5 960	5 390	5 505	70,8
Camel	2 224	1 319	1 216	1 288	1 305	58,7

Source: South Kazakhstan area and its regions: statistical collection / Department of statistics of SKR. – Shymkent, 2016.

From 2012 to 2016 the output of dairy products in SKR has increased by 48 533 tons that has made 107,3%.

On the volume of production of the milk of processed liquid and cream in 2015 the Southern Kazakhstan area has made - 20 328 tons, takes the 6th place in a regional section or 4,48% of total amount – 453 646 tons.

On the volume of production of the butter SKR have produced 102 tons, has taken the 11th place or 0,6% of total amount – 16 564 tons. The volume of production of cheeses and cottage cheese – 925 tons, borrows - the 10th place or 3,1% of total amount - 30 104 tons [8]. It should be noted that SKR on the output of milk of all types has taken the second place, however considerably concedes in a section of regions on the processed dairy products. In this regard, it is necessary to increase the overworking dairy industry of the Southern Kazakhstan area around the city and to districts.

The main methods of research on the market for milk and dairy products include the segmentation of producers, analysis of the internal and external environment of the sectoral subcomplex, product matrix. Segmentation of milk producers shows that in the dairy subcomplex of SKR there are agricultural enterprises, peasant (farm) farms, households of population (Table 5).

Table 5 - Production of separate types of production of livestock production (raw milk)

Name	2012	2013	2014	2015	2016
all categories of farms					
Raw milk	662 109	660 673	679 542	699 922	710 642
agricultural enterprises					
Raw milk	4 414	4 382	4 648	7 561	10 544
farming or peasant farms					
Raw milk	14 635	15 512	16 697	18 756	21 161
farms of the population					
Raw milk	643 060	640 779	658 197	673 605	678 937

Source: South Kazakhstan area and its regions: statistical collection / Department of statistics of SKR. – Shymkent, 2016.

The share of the collective agricultural organizations in the total amount of agricultural production of SKR is small — 1,48%, however by estimates of economists, the collective agricultural organizations are the key sector of agrarian economy owing to the fact that domestic agriculture can only develop effectively as large-scale production.

It belongs also to dairy cattle breeding as in this branch the high level of capital expenditure and long terms of increase (for the biological reasons) the number of herd of milk cows. In this regard, it is necessary to increase a share of agricultural enterprises in the agrarian sector of SKR, way of implementation of state programs "Agrobusiness-2020", "Exporter-2020", etc.

**Conclusion.** In modern economic conditions, the main goals for production organizations are profit and satisfaction of public needs, for the achievement of which it is necessary to solve many tasks: analysis of activities, identification of weaknesses and their elimination, forecasting, optimization of the production process, development of the production potential of the enterprise.

The main promising areas of formation of economic relations between agricultural and milk processing organizations are:

- perfection of the pricing system;
- state support of milk producers;
- expansion of infrastructure facilities;
- expansion of integration processes.

The efficiency of functioning and development of a dairy and grocery subcomplex in many respects depends on formation of the mutually beneficial economic relations between branches of production and processing of production. At the same time the importance is allocated for the integration processes capable to provide technological, organizational and economic unity and achievement of continuity of stages of a turnover of dairy products and finishing it to the consumer.

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 the tendency to decrease in consumption of pasteurized production in favor of natural is observed.

One of elements of the state policy directed to increase in number of consumers in the regional market is support of introduction and subsidizing of new technologies and the equipment, to offer the allowing local producers of dairy products competitive goods which could attract the interest of bigger number of consumers [9].

Regional public authorities are also able to increase considerably the number of consumers by means of regional programs for the following directions:

1. Promoting the best goods of the region by promoting the trademark "Made in South Kazakhstan area"
2. Support for the best commodity producers in the region by providing them with benefits on advertising, taxes, etc.
3. Assistance in establishing economic ties with producers and consumers from other regions and states.

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**Ж.Ш. Кыдырова<sup>1</sup>, Е.З. Онласынов<sup>1</sup>, А.У. Абишова<sup>2</sup>, А.А.Шадиева<sup>1</sup>**

<sup>1</sup>Южно-Казахстанский гуманитарный институт им.М.Сапарбаева

<sup>2</sup>Южно-Казахстанский государственный университет им.М.Ауэзов, Шымкент, Казахстан

### **ИССЛЕДОВАНИЕ СИТУАЦИИ НА РЫНКЕ МОЛОКА И МОЛОЧНОЙ ПРОДУКЦИИ ЮЖНО-КАЗАХСТАНСКОЙ ОБЛАСТИ**

**Аннотация.** Складывающаяся ситуация на рынке молочной продукции предъявляет принципиально новые требования к маркетинговой деятельности, принятию управленческих решений, организации производства и реализации. Целью исследования является изучение особенностей рынка молочной продукции и на его основе разработка рекомендаций для совершенствования прогнозирования спроса и повышения потребительских качеств исследуемой продукции. Также предполагалось провести исследование потенциальных возможностей субъектов рынка молочной продукции в ЮКО с применением современных методов и стратегии управления потребительским спросом, разработать предложения по совершенствованию механизма управления потребительским спросом. Для достижения поставленной цели ставились задачи проанализировать не только внутреннюю специфику продовольственного рынка, но и внешние факторы, непосредственно влияющие на эти процессы; обобщить опыт зарубежных стран в вопросах управления рыночным спросом; провести экспресс-анализ рынка молока и молочных продуктов в Казахстане и ЮКО; предложить направления развития рынка молока и молочной продукции. Объектом исследования являются экономические отношения, возникающие в ходе взаимодействия спроса и предложения на молоко и молочную продукцию. Предметом исследования являются факторы и тенденции в развитии рынка молока и молочной продукции.

**Ключевые слова:** потребители, спрос, цена, маркетинг, молочная продукция.

**Ж.Ш. Кыдырова<sup>1</sup>, Е.З. Онласынов<sup>1</sup>, А.У. Абишова<sup>2</sup>, А.А.Шадиева<sup>1</sup>**

<sup>1</sup>М.Сапарбаев атындағы Оңтүстік Қазақстан гуманитарлық институты;

<sup>2</sup>М.Әуезов атындағы Оңтүстік Қазақстан мемлекеттік университеті, Шымкент, Қазақстан

### **ОҢТҮСТІК ҚАЗАҚСТАН ОБЛЫСЫ СҮТ ЖӘНЕ СҮТ ӨНІМДЕРІ НАРЫҒЫНДАҒЫ ЖАҒДАЙДЫ ЗЕРТТЕУ**

**Аннотация.** Сүт өнімдері нарығында орын алған жағдай маркетингтік іс-әрекетіне, басқару шешімдерін қабылдауға, өндірісті ұйымдастыру және өткізуге түбегейлі жаңа талаптарды қойып келеді. Зерттеудің мақсаты ретінде сүт өнімдері нарығының ерекшеліктерін анықтау және оның негізінде зерттелінетін өнімге сұранысты болжамдауды жетілдіру мен тұтынушылық қасиеттерін жоғарылату бойынша ұсыныстарды жасау есептеледі. Сонымен қатар, тұтынушылық сұранысты басқарудың заманауи стратегиялары мен әдістерін қолдану арқылы ОҚО сүт өнімдері нарығындағы субъектілерінің потенциалды мүмкіндіктерін зерттеу қарастырылып, тұтынушылық сұранысты басқару механизмін жетілдіру бойынша ұсыныстарды жасау жоспарланған. Қойылған мақсатқа қол жеткізу үшін бір қатар міндеттер қойылды, атап айтқанда азық-түлік нарығының ішкі ерекшеліктерін ғана емес, сонымен қатар осы үрдістерге әсер ететін сыртқы факторларды талдау; нарықтық сұранысты басқару мәселелері бойынша шет елдердің тәжірибесін жинақтау; Қазақстанда және ОҚО сүт және сүт өнімдері нарығын экспресс-талдаудан өткізу; сүт және сүт өнімдері нарығының даму бағыттарын ұсыну. Зерттеу нысаны ретінде сүт және сүт өнімдеріне сұраныс пен ұсыныстың ара қатынасы жағдайында пайда болатын экономикалық қарым-қатынастар есептеледі. Зерттеу пәні болып сүт және сүт өнімдері нарығы дамуындағы факторлар мен тенденциялар алынған.

**Түйін сөздер:** тұтынушылар, сұраныс, баға, маркетинг, сүт өнімдері.

#### **Information about authors:**

Kadyrova Zh. - candidate of economic Sciences, associate Professor ms.zhamilya@mail.ru South Kazakhstan state University M. Auezov

Ondasynov E. Z. - candidate of agricultural Sciences onlasynov@mail.ru South Kazakhstan humanitarian Institute.M. Saparbaev;

Abishova A.U. - candidate of economic Sciences, associate Professor guljan.abishova@bk.ru South Kazakhstan state University M. Auezov;

Shadieva A. A. - candidate of economic Sciences shadieva@mail.ru South Kazakhstan humanitarian Institute M. Saparbaev

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