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CURRENT STATE AND PROSPECTS FOR DEVELOPMENT OF THE MEAT AND DAIRY INDUSTRY IN AZERBAIJAN

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Formulation of the problem. The article examines the role and significance of foreign trade relations in the development of the meat and dairy industry in Azerbaijan and the main priorities of its development. in this area, as well as the shares of individual countries in the export of domestic products in accordance with the procedure for conducting regulatory impact assessments on the issues being studied. *The purpose of the article* is to analyze the main problems and positive aspects of the current state, as well as prospects for the development of the meat and dairy industry in Azerbaijan. *The methodological basis of the research* was logical methods of information processing, statistical analysis, and comparison. *The main research hypothesis.* For many years, the demand for meat and dairy products in Azerbaijan has not been satisfied in the full sense of the word - so far it cannot be said that the quality of local products contributes to a healthy lifestyle for all segments of the population. *Presenting main material.* The activity of a more efficient agrarian market of the country is being investigated with the aim of forming the export potential of meat and dairy products, creating more significant areas for the import-export of meat and dairy products, and research was also conducted to ensure the formation and efficiency of the import-export system. *Originality and practical significance of the research.* The conclusions must be taken into account when placing meat and milk processing enterprises in order to ensure their optimal placement in economic regions of the country. At the same time, when choosing the optimal location, one should take into account both the level of development of the raw material base of enterprises and the location of consumers of manufactured products. *Conclusions.* Despite the tendency to increase the production of meat and dairy products in Azerbaijan in recent years, the problem remains the low-quality satisfaction of the demand for these products. The reasons why this problem has been happening for many years are the insufficient development of the fodder base of livestock farming, weak integration links between meat and dairy enterprises, as well as enterprises and farms that act as suppliers of their raw materials, as well as some omissions. is allowed when processing enterprises are located in the regions of the country.

Key words:
meat and dairy industry, meat and dairy products, export potential, agro-industrial direction of development.

СУЧАСНИЙ СТАН ТА ПЕРСПЕКТИВИ РОЗВИТКУ М'ЯСО- МОЛОЧНОЇ ПРОМИСЛОВОСТІ В АЗЕРБАЙДЖАНІ

Постановка проблеми. У статті розглядається роль і значення зовнішньоторговельних зв'язків у розвитку м'ясо-молочної промисловості в Азербайджані та основні пріоритети її розвитку, застосовано метод порівняльного аналізу виробництва, імпорту та експорту потенціалу м'ясо-молочної продукції, розглядаються заходи щодо реалізації основних напрямків у цій сфері, а також частки окремих країн в експорті вітчизняної продукції відповідно до порядку проведення оцінки регуляторного впливу щодо питань, що вивчаються. *Метою статті* є аналіз основних проблем та позитив-

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них сторін сучасного стану, а також перспектив розвитку м'ясо-молочної промисловості Азербайджану. *Методологічною основою дослідження* були логічні методи обробки інформації, статистичного аналізу, порівняння. *Основна гіпотеза дослідження.* Вже багато років попит на м'ясо-молочну продукцію в Азербайджані не задовольняється в повному розумінні цього слова - поки що не можна сказати, що якість місцевої продукції сприяє здоровому способу життя всіх верств населення. *Виклад основного матеріалу.* Досліджується діяльність більш ефективного аграрного ринку країни з метою формування експортного потенціалу продукції м'ясо-молочної промисловості, створення більш значущих площ для імпорту-експорту м'ясо-молочної продукції, а також проведено дослідження щодо забезпечення формування та ефективності системи імпорту-експорту. *Оригінальність і практична значущість дослідження.* Висновки необхідно враховувати при розміщенні м'ясо- і молокопереробних підприємств з метою забезпечення їх оптимального розміщення в економічних районах країни. При цьому при виборі оптимального місця розташування слід враховувати як рівень розвитку сировинної бази підприємств, так і розміщення споживачів виробленої продукції. *Висновки.* Незважаючи на тенденцію до зростання виробництва м'ясо-молочної продукції в Азербайджане в останні роки, проблемою залишається неякісне задоволення попиту на цю продукцію. Причинами того, що ця проблема має місце вже багато років, є недостатній розвиток кормової бази тваринництва, слабкі інтеграційні зв'язки між м'ясо-молочними підприємствами, а також підприємствами та фермерськими господарствами, які виступають постачальниками їх сировини, а також деякі пропуски. допускається при розміщенні переробних підприємств у регіонах країни.

Ключові слова:
м'ясо-молочна промисловість, м'ясо-молочна продукція, експортний потенціал, агропромисловий напрям розвитку.

Formulation of the problem. For many years now, the demand for meat and dairy products in Azerbaijan has not been satisfied in the full sense of the word - so far we cannot say that the quality of local production contributes to a healthy lifestyle for all segments of the population. In our country, most of the energy that a person receives from food in the daily diet falls on plant foods. As part of achieving a balanced diet, the development of the meat and dairy industry will directly contribute to the elimination of this imbalance. This task, first of all, implies the development of a resource base that plays a role in relation to these branches of the livestock sector of agriculture. All these prerequisites necessitate an analysis of the current state of the meat and dairy industry in Azerbaijan, actualizing the search for solutions on their future development.

The study used methods of economic and statistical analysis and comparison, as well as the study of time series.

The development of the meat and dairy industry is dictated by the livestock sector of agriculture - the most important component of this industry. However, before searching and finding ways of development, it is advisable to consider some aspects of agriculture in general.

Analysis of the main publications and studies. The study shows that for the period from 2013 to 2021. With the exception of 2014 and 2016, there was an increase in agricultural production, which reached its highest level in 2017, amounting to 16.8%. If we consider in the context of crop production and animal husbandry, then for that period the growth rates were, respectively, 17.1% and 16.65%. Despite this, the share of livestock products in the total volume of agricultural production was higher. In our opinion, this may be due to the fact that these products do not properly meet the needs of the population of our country – i.e. supply does not cover demand; as a consequence, the market prices for these goods rise.

The purpose of the article is to analyze the main problems and positive aspects of the current state, as well as prospects for the development of the meat and dairy industry in Azerbaijan.

Presentation of the main research material. It should be noted that in 2021, compared to 2013, the share of crop production in the structure of agriculture decreased from 50.1% to 49.2%; and, accordingly, the share of livestock production increased from 49.9% to 50.8%. In our opinion, the predominance of animal husbandry will continue for the time being; and, given that, as we pointed out earlier, the population's need for these products is not satisfied in sufficient volume, it is clear why there is a rapid increase in prices for these products.

Studies show that in 2002, compared to 2016, the number of cattle in all categories of

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farms decreased from 2708.3 thousand heads to 2648.8 thousand heads, or by 2.2%. The decrease was 2.5% for individual entrepreneurs, family peasant and personal farms, and at agricultural enterprises there was an increase in the number of livestock by 18.9%. However, it should be noted here that the production of meat and milk in agricultural enterprises is small; The leading positions in this parameter are occupied by family farms, individual entrepreneurs and households. It is noteworthy that in the analyzed period in our country there was an increase in the number of cows among certain categories of farms (Table 1).

Table 1 – **Number of cows by categories of farms, thousand heads**

	2016	2017	2018	2019	2020	2021	2022	in 2022 compared to 2016, %
All categories of farms	2466,0	2484,3	2426,3	2482,6	2484,1	2504,0	2519,7	102,2
Compared to the previous year, %	-	100,7	97,7	102,3	100,1	100,8	100,6	-
Agricultural enterprises	36,0	39,0	42,6	43,2	42,0	44,6	44,0	122,2
Compared to the previous year, %	-	108,3	109,2	101,4	97,2	106,2	98,7	-
Individual entrepreneurs, family farms and households	2430,0	2445,3	2433,7	2439,4	2442,1	2459,4	2475,7	101,9
Compared to the previous year, %	-	100,6	99,5	100,2	100,1	100,7	100,7	-

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

As can be seen from the table, the number of cows increased by 2.2% for all categories of farms, of which: for individual entrepreneurs, family farms and households - the value reached 1.9%; and the largest value - 22.2% - was recorded in agricultural enterprises. As for small cattle, on the contrary, in general, there was a decrease in the number of livestock. Thus, for the period under review, the decrease in the number of small ruminants in all economic categories amounted to 6.8%; of which: for agricultural enterprises it was 11.2%; individual entrepreneurs, family peasants and households - 6.7%. The difficulties of keeping small ruminants - in particular, the lack of available pasture areas - have led to a noticeable decrease in the number of these animals. The production of meat of all categories in Azerbaijan is presented by the data of the following table (Table 2).

Table 2 – **Meat production by types, thousand tons**

Years	Meat, total	Including			
		Beef	Lamb and goat meat	Pork	Poultry meat
2013	286,9	120,8	70,9	0,7	94,5
2014	291,2	122,4	68,7	0,7	99,4
2015	298,6	129,8	70,9	0,5	97,2
2016	302,2	131,0	75,2	0,5	95,5
2017	316,8	132,9	79,1	0,5	104,3
2018	326,0	135,6	80,8	0,5	109,1
2019	335,7	137,9	85,3	0,5	112,0
2020	346,0	143,1	87,0	0,5	115,4
2021	357,6	145,0	87,7	0,5	124,4

Source: Agriculture of Azerbaijan, statistical compilation, official publication, GKS, 2022, p.104.

As can be seen from the table, the volume of meat production in all categories of farms, including beef, lamb and goat meat, as well as poultry meat, has continued to grow over the

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past nine years. During the period under review, the increase in meat as a whole amounted to 70.7 thousand tons (24.6%), beef - 24.2 thousand tons (20.0%), mutton and goat meat - 16.8 thousand tons (23.7 %); the increase in poultry meat amounted to 29.9 thousand tons (31.6%). Stimulating the cultivation of forage crops will help solve the problem of providing livestock with a forage base. "In recent years, the production of livestock products has increased in the country, which, in turn, brings to the fore the problem of their fodder supply. Despite a number of studies done in this area, there are still problems with expanding access to compound feeds" [1, p. 18].

During these years, the production of pork, due to the fact that this product is not included in the diet of most of the country's population, because its consumption is not accepted according to our religious values, continued to decline; for the analyzed period, the decrease amounted to 0.2 thousand tons (28.6%).

An analysis of the increase in the production of various types of meat products shows that in recent years, poultry meat has held the first place in this indicator. This is due to the fact that the development of industrial poultry farming is easier than the production of cattle meat, moreover: its production cycle is shorter; plus, there is a tendency to reduce the number of cows with the resulting rise in the cost of beef, which is accompanied by an increase in the cost of keeping animals; plus, the selection process using genetics in relation to these animals is at a lower level compared to poultry and pig breeding" [6, p. 18].

So, the growth trend of poultry meat production in comparison with other types of meat is observed almost all over the world, exceeding the value of 30% in absolute terms; the corresponding dynamics is also observed in our country - the share of poultry meat in the total volume of meat production remains high, fluctuating within 32.9-34.8% during 2013-2021.

Data on the production of the main types of meat for the last five years are presented in the following diagram (Figure 1).

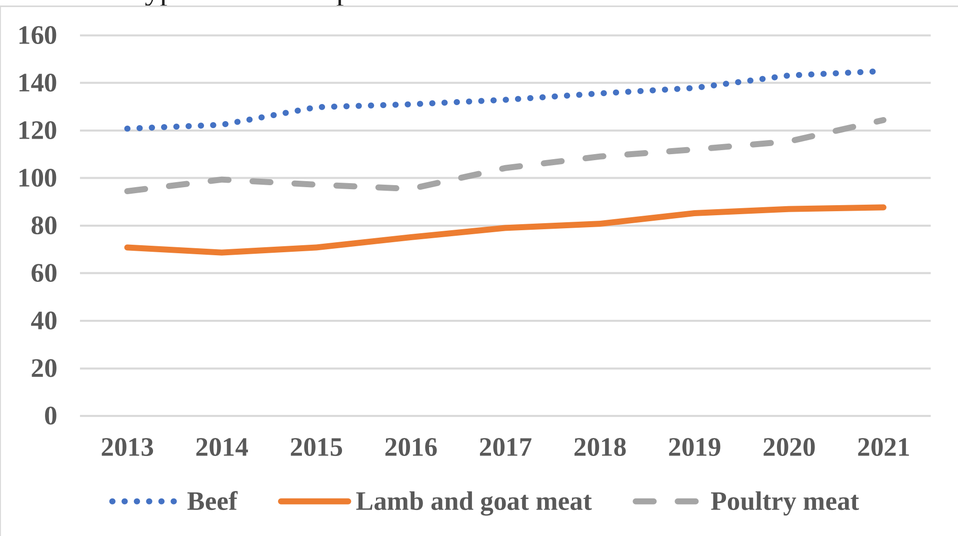

Figure 1 – Meat production by types, thousand tons
Source: developed by the authors

Compared to 2016, the increase in meat production in 2021 amounted to: for all categories of farms - 18.3%; 8.3% - for agricultural enterprises; and for individual entrepreneurs, in family farms and subsidiary farms - 20.6%. Currently, most of the meat produced in our country falls on individual entrepreneurs, family farms and households. They accounted for 83.2% of meat produced in 2021; the remaining 16.8% - to the share of agricultural enterprises.

The fact that a significant part of the meat is produced by small farms acts as a factor that negatively affects the establishment of economic relations with processing enterprises to identify opportunities for cooperation at the proper level. "Although the process of disaggregation of farms and the formation of small economic units has stopped, economic and technological ties are still not formed; relations with primary processing enterprises are still at an unsatisfactory level; the influence of processing enterprises that hold monopoly positions is preserved" [2, p. 244].

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Table 3 – **Poultry meat production by categories of farms, thousand tons**

	2016	2017	2018	2019	2020	2021	In 2021 compared to 2016, %
All categories of farms	95,5	104,3	109,1	112,0	115,4	124,4	130,3
Compared to the previous year, %	-	109,2	104,6	102,7	103,0	107,8	-
Agricultural enterprises	53,6	61,2	57,0	51,5	49,6	56,2	104,9
Compared to the previous year, %	-	114,2	93,1	90,4	96,3	113,3	
Individual entrepreneurs, family farms and households	41,9	43,1	52,1	60,5	65,8	68,2	162,8
Compared to the previous year, %	-	102,9	120,9	116,1	108,8	103,6	-

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

As we already mentioned, the growth rate of poultry meat was higher than that of other types of meat in different categories of farms, which we attributed to the fact that the production of poultry meat takes a shorter period of time compared to the production of other types of meat (Table 3).

During the analyzed period, milk production in all categories of farms increased by 23.8%, including: cow and buffalo - by 24.5%, but there was also a decrease - by 11.0% - in sheep and goat. A significant part of the milk produced in the country is cow and buffalo milk (98.1-98.3%), sheep and goat (1.6-1.9%) have smaller production volumes (Table 4, Figure 2).

Table 4 – **Milk production by types for all categories of farms, thousand tons**

Years	Milk, total	Including	
		Cow and buffalo milk	Sheep and goat milk
2013	1796,7	1756,7	40,0
2014	1855,8	1824,2	31,6
2015	1924,5	1889,8	34,7
2016	2009,9	1971,7	38,2
2017	2024,1	1985,0	39,1
2018	2080,4	2042,8	37,6
2019	2150,8	2114,4	36,4
2020	2192,5	2156,9	35,6
2021	2223,9	2187,8	35,6

Source: Agriculture of Azerbaijan, statistical compilation, official publication, GKS, 2022, p. 105

A significant part of milk in our country is produced by small farms - individual entrepreneurs, family farms and subsidiary plots. This situation complicates the integration of farms with dairy processing enterprises. “The structure of agriculture in the Republic of Azerbaijan is dominated by small farms, and this is one of the problems that hinders competitiveness. The lack of an acceptable level of relations between the enterprises of the processing industry and agricultural producers in the country, the presence of certain problems in the integration of the processing industry with the agricultural sector also hinders the development of the industry” [1, p.72].

Despite the growth in the production of meat and dairy products in our country in recent years, this indicator per capita does not yet reach the criteria of such a quality that, from the standpoint of recommended physiological norms, would serve as a guarantee of a healthy lifestyle for the population. This is also evidenced by the data of the following Table 5.

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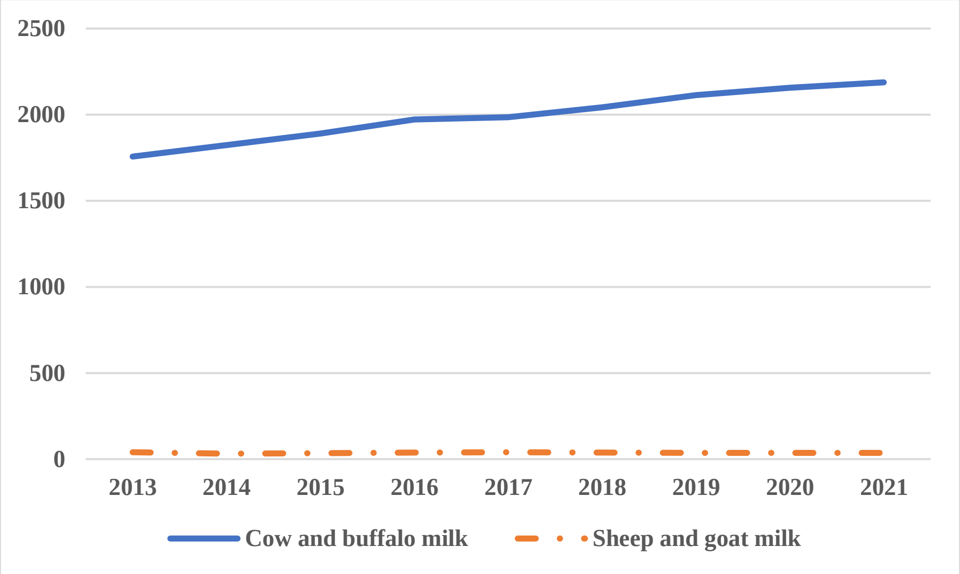

Figure 2 – Milk production by types, thousand tons
Source: developed by the authors

Table 5 – **Production of meat and milk per capita in Azerbaijan, kg per year**

	2014	2015	2016	2017	2018	2019	2020	2021	In 2021 compared to 2014, %
Meat production	31,0	31,0	31,0	33,0	33,0	34,0	35,0	36,0	116,1
Compared to the previous year, %	-	100,0	100,0	106,5	100,0	103,0	106,1	102,0	-
Milk production	197,0	202,0	209,0	208,0	212,0	217,0	220,0	222,0	112,7
Compared to the previous year, %	-	102,5	103,5	99,5	101,9	102,4	101,4	100,9	-

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

As you can see, in 2021, compared to 2014, meat production per capita increased from 31 to 36, or, in other words, by 5 kg (16.1%), and milk production - from 197 to 222, or by 25.0 kg (12.7%). In 2021, meat production per capita was almost at the level of the minimum consumption norm (31.5 kg), and milk production was 95.6% of the corresponding norm (222 kg). This means that the amount of milk produced in our country in terms of one person did not even reach the level of the minimum consumption rate.

To bring milk production per capita to the level of the physiological norm recommended by the World Health Organization, this indicator must be increased by 1.8 times (up to 404 kg), and meat production should be brought to the level of the physiological norm (70.1 kg). That is, in general, the volume of production per capita should increase by 1.9 times.

It can be concluded that the markets for these goods are far from the level of "saturation"; nevertheless, although their potential “capacity” is great, it is possible to bring it to the maximum level, which, among other things, depends on the regulation of economic relations between enterprises that process these products and partners - market entities. From the point of view of the prospects for the development of meat and dairy enterprises, we can well say that their market opportunities are huge. Meat production per capita in relation to the established minimum norm increased over the analyzed years from 98% to 111.1%. During the period under review, the same indicator recommended by the World Health Organization, but in relation to consumption, has not changed. Growth in production, outpacing consumption in terms of per capita, is due, in our opinion, to high prices for this product with a low level of its economic affordability.

In our country, the ratio of milk yield to the minimum norm (232.3 kg) for 2014-2020 increased from 84.8% to 94.7%. During this period, per capita milk consumption, which should meet the recommended norm of the

World Health Organization (this norm is designed for people leading an active and healthy lifestyle), decreased from 67.9% to 66.1% (1.8%). In our opinion, the lag in the growth of milk consumption compared to the production of this product per capita is due to the fact that the prices for this product are quite high, and economic accessibility for many groups of the population is low. To a greater extent, this is manifested in relation to dairy products produced at food industry enterprises.

On the one hand, the fact that the production of milk and meat products is less than the need for them; on the other hand, the fact that these products are not imported in sufficient quantities to cover demand indicates a low level of supply in the market. As a result, market prices are rising, giving rise to problems related to ensuring the economic accessibility of these products to low-income segments of the population.

The volume of production of meat and dairy products by enterprises of the processing industry is much lower than the demand for these products. For example, the production of butter - a dairy product - is not even at the minimum level of demand for this product in our country. Despite the fact that the minimum production volume required to cover the needs of the population of our country in these products in 2021 was 68 thousand tons, only 27 thousand tons were produced – 41.5% of the required minimum.

The dynamics of the production of meat and dairy products by food industry enterprises of our country in recent years is characterized by the data of the following table (Table 6).

Table 6 – **Dynamics of production of meat and dairy products, thousand tons**

	2016	2017	2018	2019	2020	2021	In 2021 compared to 2016, %
Sausages	13,3	13,5	16,4	19,3	25,8	26,7	2,0
Milk and cream with a fat content of 1-6%	881,0	925,6	929,3	962,0	974,6	965,1	109,5
Milk and cream with a fat content of more than 6%	6,3	6,5	6,9	7,6	8,8	9,0	142,9
Oil	25,6	25,3	23,6	24,1	24,6	27,0	105,4
All types of cheese	49,4	54,0	50,1	51,4	53,5	53,4	108,1
Yogurt and other dairy products	136,4	146,6	131,2	141,3	157,0	151,5	111,1
Ice cream	0,7	0,5	0,2	0,9	2,2	3,4	4,9 p.

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

High prices for meat and dairy products, as well as problems associated with meeting the demand for these products, are complemented by the irrationality of locating enterprises in the regions. The location of some enterprises for the processing of milk and meat in the capital and their remoteness from the raw material base creates problems that cause an increase in the price of milk and affect the level of satisfaction of demand for this product. This is clearly seen from the data of the following tables, showing the geography of distribution of raw materials, represented by their "density", which serves as the basis for opening meat and dairy enterprises in those areas (Table 7, Table 8).

As can be seen from the analysis of statistical data, the density of the raw material base of both the meat and dairy industries in the city of Baku is at the lowest level, and in general, the volume of meat and milk production in this economic region ranks last compared to other economic regions.

In such a situation, the location of a meat and dairy enterprise in the capital of the country cannot be considered appropriate. "As you know, if raw materials are characterized by rather impressive volumes in comparison with the final product, which, moreover, is several times more expensive than the initial raw materials, then it is necessary to place the enterprise close to the source - the raw material base.

This applies to flour-grinding, meat-processing, fat-and-oil and cheese-making enterprises. If the final product loses its qualities (spoilage) faster than the raw material, then the processing plant should be in close proximity to the consumer (for example, the production of bread and ice cream)" [7, p. 536].

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Table 7 – **Density of the raw material base of the meat industry in Azerbaijan**

	The volume of raw materials in 2021 in carcass weight, tons	Territory area, thousand square meters km	Raw material density, t/sq.km
Baku city	3857	2,14	1,80
Nakhchivan Autonomous Republic	16505	5,5	3,00
Absheron-Khizi	7185	3,73	1,93
Mountain Shirvan	11750	6,13	1,92
Ganja-Dashkesan	9096	5,27	1,73
Karabakh	26910	8,99	2,99
Gazakh Touz	21727	7,03	3,09
Guba-Khachmaz	49785	6,96	7,15
Lankaran-Astara	23828	6,07	3,93
Central Aran	37991	6,69	5,68
Mil-Mugan	26782	5,67	4,72
Sheki-Zagatala	21097	8,84	2,39
East Zangezur region	5856	7,47	0,78
Shirvan-Salyan	28395	6,08	4,67
All Azerbaijan	290764	86,57	3,4

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

Table 8 – **Density of raw materials of the dairy industry in Azerbaijan, tons**

	Volume of milk production in 2021, tons	Territory area, thousand square meters km	Raw material density, t/sq.km
Baku city	5143	2,14	2,40
Nakhchivan Autonomous Republic	88565	5,5	16,10
Absheron-Khizi	60773	3,73	16,29
Mountain Shirvan	128002	6,13	20,88
Ganja-Dashkesan	125756	5,27	23,86
Karabakh	311007	8,99	34,59
Gazakh-Touz	188939	7,03	26,88
Guba-Khachmaz	177757	6,96	25,54
Lankaran-Astara	234603	6,07	38,65
Central Aran	267249	6,69	39,95
Mil-Mugan	253922	5,67	44,78
Sheki-Zagatala	198762	8,84	22,48
East Zangezur region	43943	7,47	5,88
Shirvan-Salyan	139006	6,08	22,86
All Azerbaijan	2223427	86,57	25,7

Source: the table was compiled by the author based on information from the State Statistics Committee of Azerbaijan

The fact is that the volume of meat production in the Absheron-Khizi region, as the economic region closest to Baku, is also very low. Guba-Khachmaz, Central Aran and Shirvan-Salyan regions occupy leading positions among economic regions in terms of the amount of resources to be used as raw materials. In terms of the volume of meat (slaughter weight) produced in 2021, these economic regions took the first three places, respectively.

The findings should be taken into account when locating meat and milk processing enterprises in order to ensure their optimal placement in the economic regions of the country. At the same time, both the level of development of the raw material base of enterprises and the location of consumers of manufactured products should be taken into account when choosing the optimal location. "Processing enterprises are trying to minimize the cost of raw materials and finished products. If the transportation of raw materials is cheaper than the transportation of finished products, then when choosing a location, the priority is to provide the consumer with food. If the raw material is more difficult to transport compared to the final product, the enterprise is located in the region of the raw material zone. Changes in

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the cost of both agricultural raw materials and the delivery of goods can lead to a change in the location of the enterprise in the framework of ensuring a reduction in the cost of production" [7, p. 537]. The solution of the above issues while ensuring the proper level of prices for these products can have a beneficial effect on the development of the meat and dairy industry, leading to an increase in its accessibility to the population.

Conclusions and prospects for further research. Despite the growth trend in the production of meat and dairy products in our country in recent years, the problem remains poor-quality satisfaction of demand for these products. The reasons for the fact that this problem has been taking place for many years now include the insufficient development of the livestock feed base, weak integration ties between meat and dairy enterprises, as well as enterprises and farms that act as their raw material suppliers, plus some omissions. allowed when placing processing enterprises in the regions of the country.

Studies show that the prospects for the development of the meat and dairy industry in our country are quite large and are determined by the unsatisfied demand of the population for meat and dairy products. To fully meet the needs of the population in meat and dairy products, first of all, it is necessary to work out all aspects of the forage base of animal husbandry; contribute to its intensive development. In addition to the above, the future development of the meat and dairy industry requires the implementation of consistent measures to protect livestock by the state and the optimal location of meat and dairy enterprises in the regions of the country.

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