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Analysis of the Market Conditions of the Poultry Products in Ukraine

Summary

Poultry farming is an industry that is characterized by extremely high dynamics of development and it is unrivaled in cost of feed and labor per unit of output. In meat poultry balance of Ukraine it occupies a significant share (about 44.9%). The increase in poultry farms due to insufficient supply of other types of meat - beef and pork, as well as the expansion of production at the expense of investment in the industry substantial funds of private capital.

Ukraine is now the ninth among the largest producer of poultry meat and exported these products to 30 countries - CIS, Iran, Syria, Libya, Saudi Arabia and others.

The study objective is: to identify the factors influencing the formation of market conditions, market research and development of medium-term forecast of the Ukrainian market of poultry products.

In the preparation of the scientific article, the following research methods were used: theoretical generalization, economic and mathematical methods, tabular, graphic and diagrammatic techniques, methods of comparative analysis, sociological and statistical techniques, surveillance techniques, system approach, method of scenarios and simulations.

According to the calculations, during the 2016-2018 the forecasting fund of consumption of poultry by Ukrainian population (at a constant level of consumption of 23.3 kg / person per year during this period) with a probability of 0.98 can be reduced in comparison with 2015 by 110 thousand tons or by 10.7% due to the forecast decrease in population of the country in this period by 520 thousand people or 1.2%. Projected production volumes of chicken meat during the 2016-2018 with a probability of 0.99 can be reduced by 10 thousand tons or by 0.9%.

It was found that during 2016-2018 the total projected demand for poultry eggs may be reduced to 16.99 billion pieces in Ukraine in 2016 (according to its own production – 16,920,000,000 pieces) to 14.26 billion pieces in 2018 (according to its own production – 14.22 billion pieces), or 2.73 billion units.. (16.1%) due to a possible further decline in the purchasing ability of the Ukrainians. According to analysts of the Association «Union of Poultry Breeders of Ukraine» will probably decrease the actual consumption of eggs up to 230 pieces in 2018 against actual 258 pieces per capita in 2015.

Key words: market research, forecasting, market poultry products, poultry industry, poultry, eggs, producing and consumption of poultry products, poultry enterprises.

JEL codes: Q13, Q12

Introduction

In the meat balance of Ukraine, the poultry meat occupies a significant place (almost 44.9%). Despite the sharp decrease in poultry stock during 1990 – 2000, the poultry industry in Ukraine has been renewed. Since 2000, this trend has been changed dramatically thanks to reorganization of the industry structure. The increase in poultry stock at the farming enterprises can be explained by the insufficient supply of other kinds of meat – beef and pork and expansion of production by means of investing to this industry of significant private capital funds. Due to technical re-equipment of enterprises, increase in productivity of the poultry stock, and improvement of veterinary support, large poultry farms managed to significantly increase the poultry stock [1].

Proper information support is the basis for the successful operation of the poultry enterprise. To make well-grounded marketing decisions, the complete, relevant and reliable information, that can be obtained based on a comprehensive study of the marketing environment, is required.

Analysis of the recent researches and publications. The study of development of the poultry industry and competitive environment in the market of poultry meat have been appropriately reflected in the scientific works of eminent academic economists.

However, the issues of research and forecasting of the market conditions of poultry products in Ukraine require thorough study.

Aim and method

Determination of the factors influencing the formation of the market conditions, market research and development of the forecast of the market conditions of poultry products in Ukraine.

In the scientific article, the following research methods were used: theoretical generalization, economic and mathematical methods, tabular, graphical and chart techniques, the methods of comparative analysis, sociological and statistical methods, the methods of observation, systematic approach, the scenario method and the simulation modelling method.

Research result and their discussion

According to the State Statistics Service of Ukraine, our country is strongly dependent on the import of meat and meat products (first of all, beef and pork). According to the study of the statistics materials of Ukraine, in 2007-2015 the level of self-sufficiency of needs of Ukraine's population in domestic livestock products – beef and pork, in those years did not exceed 89% [2]. However, according to the experts of the Ministry of Agrarian Policy and Food of Ukraine, for the last three years the domestic producers of poultry meat have fully provided the population of our country with these products [3].

Such a state of business in the internal market of poultry products was caused by the dynamic growth of all species of poultry stock, production ramp-up, increase in the domestic demand and export of the products.

If at the beginning of 2011, all the types of farms of Ukraine had 203.8 mln of poultry stock, in 2015, the poultry stock grew to 213.3 mln, or by 9.5 mln of animal units (4.7%).

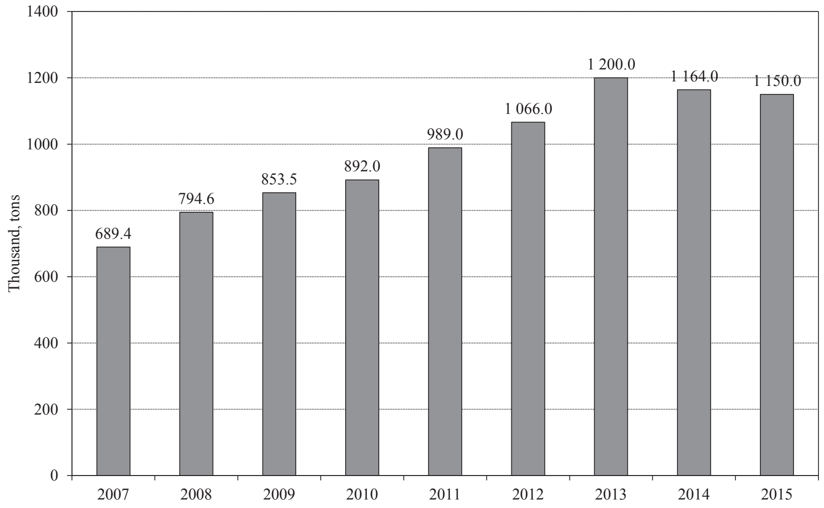
According to the study of the poultry market of Ukraine and based on the data of the State Statistics Service of Ukraine it was found that in 2014-2015, 57.7% (in 2015 – 57.4%) of the poultry stock was concentrated at the farming enterprises, and at the farms of the population – 42.3% in 2014 and 42.6% in 2015. By the way, in 2001, the part of the poultry stock at the farming enterprises made only 20.5% [2].

According to the data of the State Statistics Service of Ukraine, the scope of production of all poultry meat species was constantly rising in 2007-2015. In 2013, all the types of farms produced 1,200 thousand tons of the poultry meat (in dressed weight) against 892 thousand tons in 2010, but in 2014, under the influence of a whole range of political and economic factors it decreased to 1,164.7 thousand tons. In 2015, the production of all poultry meat species made 1,150 thousand tons (in dressed weight), that is 14 thousand tons less than in 2014 (Figure 1).

A significant increase in supply of all kinds of poultry meat in the internal poultry market in 2007-2015 became possible mainly thanks to the construction in Ukraine, in those years,

Figure 1

Dynamics of the poultry meat production at the farms of all types of Ukraine in 2011-2015, thousand tons



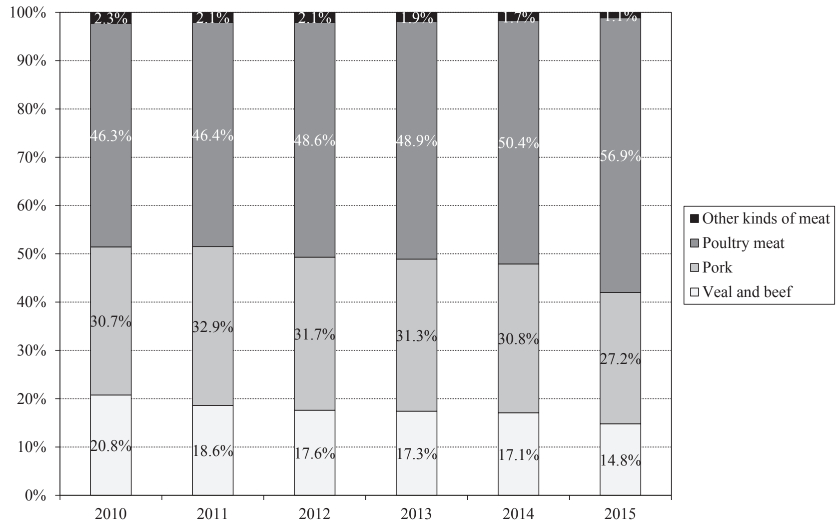
Source: calculated by the author based on [2].

of high-tech modern poultry farms and complexes, which had the technology and equipment of both the leading world producers and domestic producers.

The specific gravity of poultry meat in the production structure of all its kinds increased from 46,3% to 49,4% in 2013 and to 56,9% in 2015 (Figure 2).

Figure 2

Dynamics of the meat production structure in Ukraine in percentage



Source: calculated by the author based on [2, 4, 9].

At the end of 2015, the poultry meat was mainly proposed in the internal market of poultry products by such largest producers of poultry meat in Ukraine as PJSC “Myronivskyi Khliboprodukt” (49.8%), LLC “Complex Agromax” (14.3%), Agroindustrial Corporation “Dnipropetrovska” (7.5%), Agroindustrial Corporation “Agro-Oven” (6%), Volodymyr-Volynskyi poultry farm (3.3%) and other producers (19.1%) [9].

The main producer’s sales channels of poultry meat include: in the market through own franchise network; supermarkets; business structures engaged in the wholesale and retail trade of poultry meat; industrial producers and food processing companies; other distribution channels (Table 1).

By 2014, it will be possible to observe the increase in the poultry meat sales through supermarkets and other business structures engaged in the wholesale and retail trade of poultry meat, and a slight decrease in sales through own commercial network.

In 2014-2015, due to the sharp significant decrease in the purchasing power of the population of the country, the majority of supermarkets began to refuse to take the products from the producers in such volumes as in 2012-2013. Therefore, in the last two years the role of local markets (franchise network) has greatly increased as well as the scope of sales through own stores (8% in 2014 and 6% in 2015 vs. 2013).

Table 1

Dynamics of the poultry meat sales structure through the sales channels by the large scale enterprises in 2012-2015

Sales channel	Share of the sales channel of total sales amount, %				Deviation of 2015 from 2012
	2012	2013	2014	2015	
In the market through own franchise network	57	55	63	61	4
Supermarkets	31	33	24	22	-9
Business structures	5	4	3	3	-2
Industrial producers	5	5	6	8	3
Food processing	2	3	4	6	4
Total	100	100	100	100	-

Source: calculated by the author based on [2].

Thus, in 2014-2015, there was a situation that the internal market was not of a great interest for producers in the poultry market. Due to the low purchasing power, the Ukrainians are no longer able to buy such amounts of poultry meat as in the previous years, significantly reducing the income of producers. That is why, in 2014-2015, one can observe the increase in export of poultry meat to foreign markets.

So, according to the State Statistics Service of Ukraine, 165 thousand tons of poultry meat was supplied to the foreign markets in 2015 [2]. According to the analysts of the Association "Union of Poultry Farmers of Ukraine" in 2016, the export of poultry meat will make 190 thousand tons and large poultry meat producers will continue enhancing their export orientation, increasing the scope of supplies abroad and expanding the geography and the scope of sales [4].

The second poultry product, which is equally important, forming a stable supply in the internal market of poultry products for the last ten years, is the egg production. According to the experts of the Ministry of Agrarian Policy and Food of Ukraine, for recent years the domestic producers have provided the consumers with chicken eggs [3].

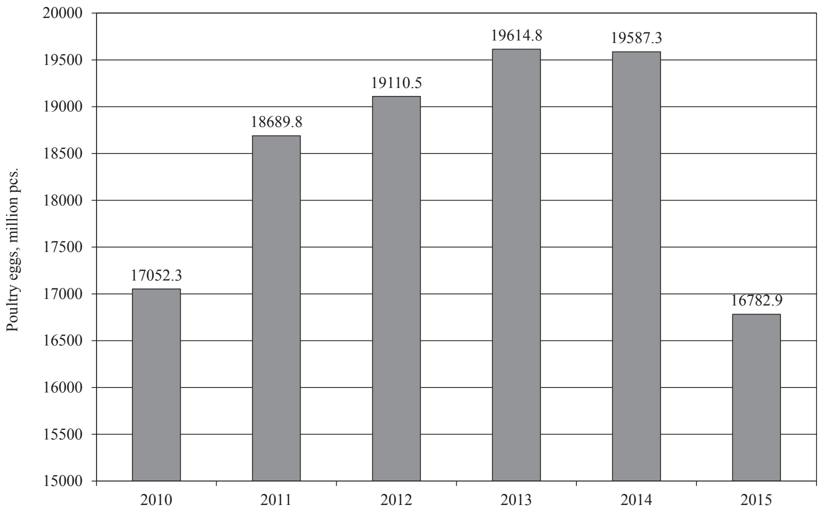
Therefore, according to the State Statistics Service of Ukraine, only for the period of 2010-2014, the egg production in Ukraine grew by 15.2% and reached 19.6 billion pcs. in 2014, which fully satisfied the scientifically grounded needs of the population consumption of this extremely important food product (Figure 3).

At the end of 2015, the chicken eggs were mainly proposed in the internal market of poultry products by such largest producers of these products in Ukraine as Group of Companies "Avangard" (56.1%), Group of Companies "Ovostar Union" (8,7%), LLC "Inter-

Zaporizhzhia" (8.1%), LLC "Avias-2000» (1,4%), JSC "Krupets" (1.1%), LLC "Poultry Farm Podillya" (1.1%) and PJSC "Poultry Farm Ternopilska" (1.1%) and other producers (22.4%) [10].

Figure 3

Dynamics of the egg production of all poultry species in Ukraine in 2010-2015, million pcs.



Source: as in Figure 1.

Before 2013, the producers' main sales channels of the chicken eggs included: in the market through own franchise network (27%), supermarkets (31%), and food processing companies (20%). In 2014-2015, the producers had to make the commodity mass redistribution between the various sales channels. The scope of sales of chicken eggs through supermarkets decreased in 2015 by 12%, sales through own stores in 2015 increased by 4% as compared to 2013.

To determine the demand in the general internal poultry market for the last five years, we have calculated the dynamics of this market capacity for such period (Table 2).

Critical analysis of the statistical information on creating the demand and supply in the market of poultry products in Ukraine for the period of 2011-2015 allows us to develop our forecast only for the short term – by 2018.

Thus, according to our calculations, the predictable supply of domestic producers in the general market of poultry products in Ukraine during 2016-2018 will be slowly decreasing, mainly because of the reduction of domestic production of poultry eggs, and at the same time, domestic production of chicken meat will remain practically at the level of 2015. The total scope of the imported poultry products will remain at the level of 2015.

Table 2

Dynamics of the internal poultry market capacity in 2010-2015

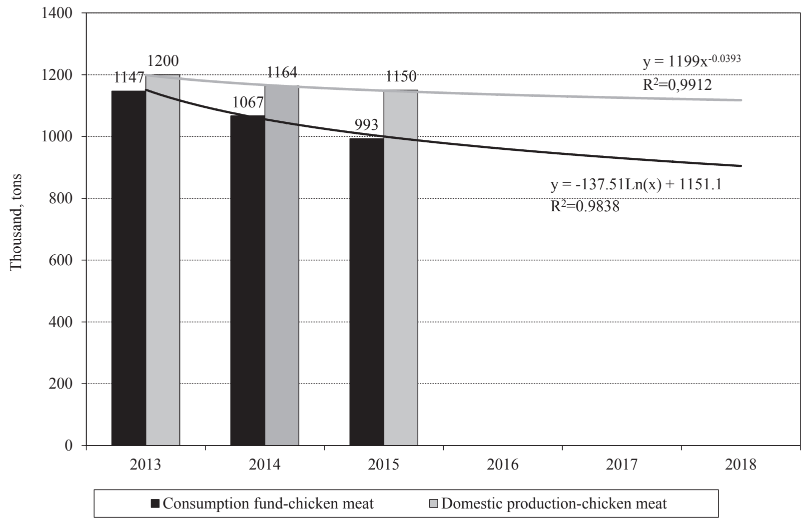
Parameters	Years						Deviation of 2015 from 2010	
	2010	2011	2012	2013	2014	2015	+/-	%
Consumption of poultry meat per capita, kg/person per year	21.6	23.2	23.7	25.3	25.1	23.3	1,7	7.9
Rational rate of egg consumption, pcs./person per year	290	290	290	290	290	290	-	-
Actual egg consumption, pcs./person per year	291	327	304	319	314	258	-33	-11.3
Population of Ukraine, mln. persons[1]	45.78	45.59	45.45	45.35	42.77	42.61	-3.17	-6.9
Capacity of the internal poultry meat market, thousand tons	988.9	1,057.8	1,077.2	1,147.5	1,073.6	992.6	3.7	0.4
Average price of 1 kg of chicken meat (carcass)[2], UAH	12.6	18.4	21.2	21.8	29.8	36	23.4	185.7
Capacity of the internal poultry meat market, bln. UAH	12.46	19.46	22.84	25.02	31.99	35.74	23.28	186.8
Capacity of the internal egg market upon the rational rate of consumption, bln. pcs.	13.28	13.22	13.18	13.15	12.40	12.36	-0.92	-6.9
Actual capacity of the internal egg market, bln. pcs.	13.33	14.95	13.86	14.51	13.47	11.01	-2.32	-17.4
Average price of chicken eggs[2], UAH/thousand pcs.	520	550	660	720	890	1370	850	163.5
Capacity of the internal egg market upon the rational rate of consumption, bln. UAH	6.90	7.27	8.70	9.47	11.04	16.93	10.02	145.2
Actual capacity of the internal egg market, bln. UAH	6.93	8.22	9.15	10.45	11.99	15.08	8.15	117.6

[1] The data exclude the areas of ATO and temporarily occupied territory of the Autonomous Republic of Crimea and Sevastopol.
[2] Selling prices in the wholesale market of agricultural products called "Stolychnyi" (Kyiv)
Source: calculated by the author based on [2, 7, 8].

To confirm this conclusion, using the trend extrapolation method by the dynamics rows, we will try to forecast the dynamics of the following parameters changes that determine the predictable supply and demand in the market of poultry products in Ukraine for the period of 2016-2018: the consumption fund of poultry meat and eggs; the scope of domestic production of poultry meat and eggs; exports and imports of poultry meat and eggs. Thus, the predictable dynamics of change in the poultry meat consumption fund for the period of 2016-2018 is given in Figure 4.

Figure 4

Dynamics of the consumption fund and scope of poultry meat production in Ukraine for the period of 2013-2018 (2016-2018 – forecast), thousand tons



Source: built by the author based on own calculations.

According to the calculations, during 2016-2018 the predictable consumption fund of chicken meat by the country population (at the constant level of consumption of 23.3 kg/person per year during the whole period) with a probability of 0.98 may decrease as compared to 2015 by 110 thousand tons or by 10.7% as a result of the predictable population decline during this period by 520 thousand persons or by 1.2%. The scope of chicken meat production in Ukraine with a probability of 0.99 may decrease by 10 thousand tons or by 0.9%.

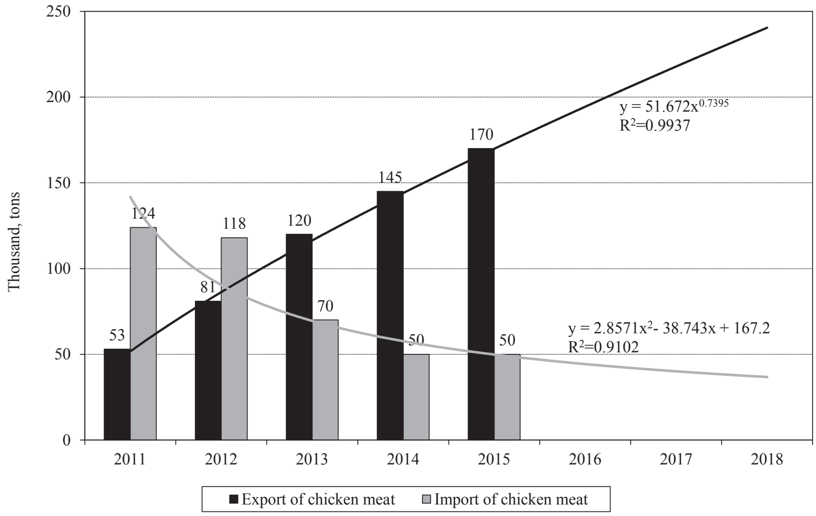
The predictable dynamics of change in the exports and imports of chicken meat for the period of 2016-2018 is given in Figure 5.

According to the calculation, during 2016-2018, with a probability of 0.99, one can observe the increase in chicken meat export, mainly to the countries of Asia, Africa and China.

Due to the allocation, the chicken meat of domestic production (up to 36 thousand tons per year, and only the white meat and breast) may be supplied to the EU countries in limited quantities, that`s why domestic producers will have to search for new sales markets in Asia and Africa independently. In 2018, the predictable poultry meat exports to the foreign market may make approximately 270 thousand tons that is 98 thousand tons more (by 57.6%) than exported by the domestic poultry farms to the foreign market in 2015.

Figure 5

Dynamics of exports and imports of chicken meat for the period of 2011-2018 (2016-2018 – forecast), thousand tons



Source: as in Figure 4.

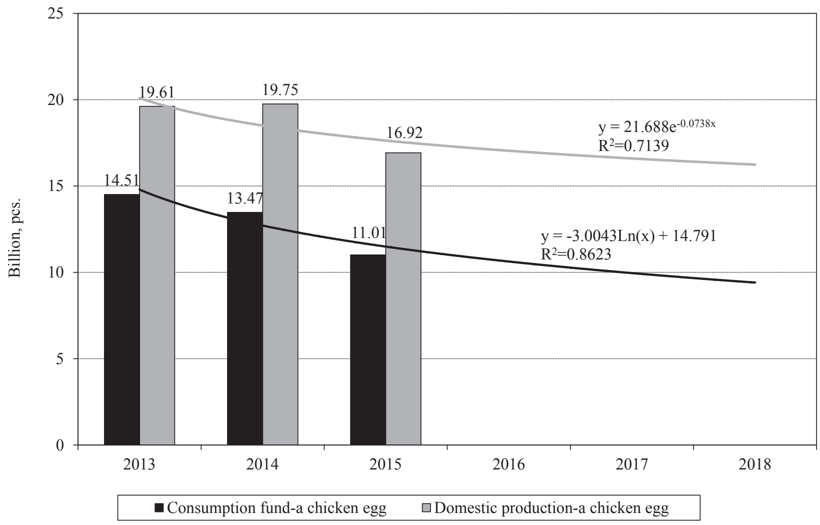
If we are talking about the import of these poultry products, then we may expect its reduction, with a probability of 0.91, or, that is more likely, its "freezing" at the level a little bit lower than such imports in 2015 (45-47 thousand tons per year).

It is found that during 2016-2018, with a probability of 0.86, the reduction of consumption fund of poultry eggs by the country population by 21.6% or by 2.51 bln. pcs. (Figure 6) is possible. This dynamics may be explained by the population decline from 42.61 mln. persons in 2015 to 42.09 mln. persons in 2018 (by 1.2%). It is also should be noted that our calculations did not take into account the impact of such factor as reduction in the purchasing power of the population.

If we are talking about the predictable scope of domestic egg production, then due to the reduced demand for these products in the internal market, the losses in the sales market

Figure 6

Dynamics of the consumption fund and scope of own production of poultry eggs in Ukraine for the period of 2013-2018 (2016-2018 – forecast), bln. pcs.



Source: as in Figure 4.

(markets of the Customs Union countries), lack of certification of domestic poultry farms for obtaining the permit for the export of eggs of A category to the EU countries and for other reasons found by us, in 2016-2018, it will be possible to observe, with a probability of 0.71, the gradual reduction of production of this food product – from 16.92 bln. pcs. in 2015 to 14.22 bln. pcs. of eggs in 2018 (by 2.7 bln. pcs. or by 16%).

Conclusions and prospects for further researches

At the end of 2015, the chicken eggs were mainly proposed in the internal market of poultry products by such largest producers of these products in Ukraine as Group of Companies "Avangard" (56.1%), Group of Companies "Ovostar Union" (8,7%), LLC "Inter-Zaporizhzhia" (8.1%), LLC "Avias-2000» (1,4%), JSC "Krupets" (1.1%), LLC "Poultry Farm Podillya" (1.1%) and PJSC "Poultry Farm Ternopilska" (1.1%) and other producers (22.4%) [10].

According to the calculations, during 2016-2018 the predictable consumption fund of chicken meat by the country population (at the constant level of consumption of 23.3 kg/person per year during the whole period) with a probability of 0.98 may decrease as compared to 2015 by 110 thousand tons or by 10.7% as a result of the predictable population decline during this period by 520 thousand persons or by 1.2%. The scope of chicken meat production in Ukraine with a probability of 0.99 may decrease by 10 thousand tons or by 0.9%.

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Taking into account the fast saturation of the internal market by the development of powerful poultry farms, the export-oriented strategy that will provide a balance of demand and supply in the internal market due to the exports to the developed and emerging world markets shall be the basis for the poultry meat market development. To implement this strategy, it is necessary to create the conditions for regulation of the food circulation, taking into account the requirements of the world market. The establishment and effective operation of the poultry market shall be based on a scheme providing interconnection between domestic producers, processing companies, consumers, and export-import transactions.

So, the problem of research and forecast of the market conditions of poultry products in Ukraine requires further thorough study.

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Analiza warunków rynkowych dla produktów drobiowych na Ukrainie

Streszczenie

Hodowla drobiu jest branżą, którą cechuje niezwykle wysoka dynamika rozwoju; jest ona poza konkurencją pod względem kosztów pasz i jednostkowych kosztów pracy. W bilansie mięsa drobiowego Ukrainy ma ona znaczny udział (ok. 44,9%). Rozwój ferm drobiowych wynika z niedostatecznej podaży innych rodzajów mięsa: wołowiny i wieprzowiny, a także rozszerzenia produkcji dzięki inwestycjom w tę branżę znacznych środków kapitału prywatnego.

Ukraina jest obecnie dziewiąta wśród największych producentów mięsa drobiowego i eksportuje te produkty do 30 krajów: WNP, Iranu, Syrii, Libii, Arabii Saudyjskiej i innych.

Celem artykułu jest identyfikacja czynników wpływających na kształtowanie się warunków rynkowych, badania rynku i opracowanie średniookresowych prognoz ukraińskiego rynku drobiu.

W trakcie przygotowania tego artykułu naukowego wykorzystano następujące metody badawcze: uogólnienie teoretyczne, metody ekonomiczno-matematyczne, techniki tabelaryczne, graficzne i wykresowe, metody analizy porównawczej, techniki socjologiczne i statystyczne, techniki obserwacji, podejście systemowe, metodę scenariuszy i symulacji.

Zgodnie z obliczeniami, w latach 2016-2018 prognozowana wielkość spożycia drobiu przez społeczeństwo Ukrainy (przy stałym poziomie konsumpcji w wysokości 23,3 kg/osobę/ rok w tym okresie) z prawdopodobieństwem 0,98 może się zmniejszyć w porównaniu z rokiem 2015 o 110 tys. ton, czyli o 10,7% w związku z prognozowanym spadkiem liczby ludności kraju w tym okresie o 520 tys. osób, czyli 1,2%. Przewidywane wolumeny produkcji mięsa drobiowego w latach 2016-2018 przy prawdopodobieństwie 0,99 mogą spaść o 10 tys. ton, czyli o 0,9%.

Stwierdzono, że w latach 2016-2018 prognozowany popyt ogółem na jaja na Ukrainie może spaść do 16,99 mld sztuk w roku 2016 (z własnej produkcji – 16,92 mld sztuk) i do 14,26 mld sztuk w roku 2018 (z własnej produkcji – 14,22 mld sztuk), czyli 2,73 mld sztuk (16,1%) ze względu na możliwy dalszy spadek zdolności nabywczej Ukraińców. Według analityków zrzeszenia Związek Hodowców Drobiu na Ukrainie prawdopodobnie nastąpi spadek obecnej konsumpcji *per capita* jaj do 230 sztuk w roku 2018 wobec 258 sztuk w roku 2015.

Słowa kluczowe: badania rynku, prognozowanie, rynek produktów drobiarskich, sektor drobiarski, drób, jaja, produkcja i spożycie produktów drobiarskich, zakłady drobiarskie.

Kody JEL: Q13, Q12

Анализ рыночных условий для птицепродуктов в Украине

Резюме

Птицеводство – отрасль, для которой характерна необыкновенно высокая динамика развития, кроме того у нее нет конкурентов по стоимости кормов и удельным издержкам продукции. В мясном балансе Украины птицепродукты составляют значительную долю (около 44,9%). Увеличение птицепроизводства вытекает из недостаточного предложения других видов мяса, т.е. говядины и свинины, а также увеличения производства за счет вложений в эту отрасль значительных фондов частного капитала.

В настоящее время Украина занимает девятое место среди крупнейших производителей мяса птицы и она экспортирует эти продукты в 30 стран мира: СНГ, Иран, Сирию, Ливию, Саудовскую Аравию и другие.

Цель работы – выявить факторы, влияющие на формирование рыночных условий, изучение рынка и разработку среднесрочных прогноз украинского рынка птицепродуктов.

В подготовке научной статьи использовали следующие методы изучения: теоретическое обобщение, экономико-математические методы, табличные, графические и диаграммные техники изображения, методы сопоставительного анализа, социологические и статистические приемы, техники наблюдения, системный подход, метод сценариев и симуляций.

Согласно расчетам, в 2016-2018 гг. прогнозируемый объем потребления птицы украинским населением (при неизменном уровне потребления в 23,3 кг на душу населения в год за этот период), при вероятности 0,98, может снизиться по сравнению с 2015 г. на 110 тыс. тонн, или на 10,7%, ввиду прогнозного снижения численности населения страны в этот период на 520 тыс. человек, т.е. на 1,2%. Предполагаемые объемы производства птицемяса в период 2016-2018 гг., при вероятности 0,99, могут снизиться на 10 тыс. тонн, т.е. на 0,9%.

Установили, что в период 2016-2018 гг. валовой прогнозируемый спрос на яйца может снизиться в Украине в 2016 г. до 16,99 млрд. штук (в соответствии с ее собственным производством в 16.920.000.000 шт.) и до 14,26 млрд. шт. в 2018 г. (в соответствии с ее собственным производством в 14,22 млрд. штук), т.е. на 2,73 млрд. шт. (16,1%) из-за возможного дальнейшего снижения покупательной способности украинцев. Согласно аналитикам ассоциации «Союз птицеводов Украины», нынешнее потребление яиц снизится в 2018 г. до 230 штук на душу населения по сравнению с 258 штуками на душу населения в 2015 г.

Ключевые слова: изучение рынка, прогнозирование, рынок птицепродуктов, птицеводство, птица, яйца, производство и потребление птицепродуктов, птицезаводы.

Коды JEL: Q13, Q12

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