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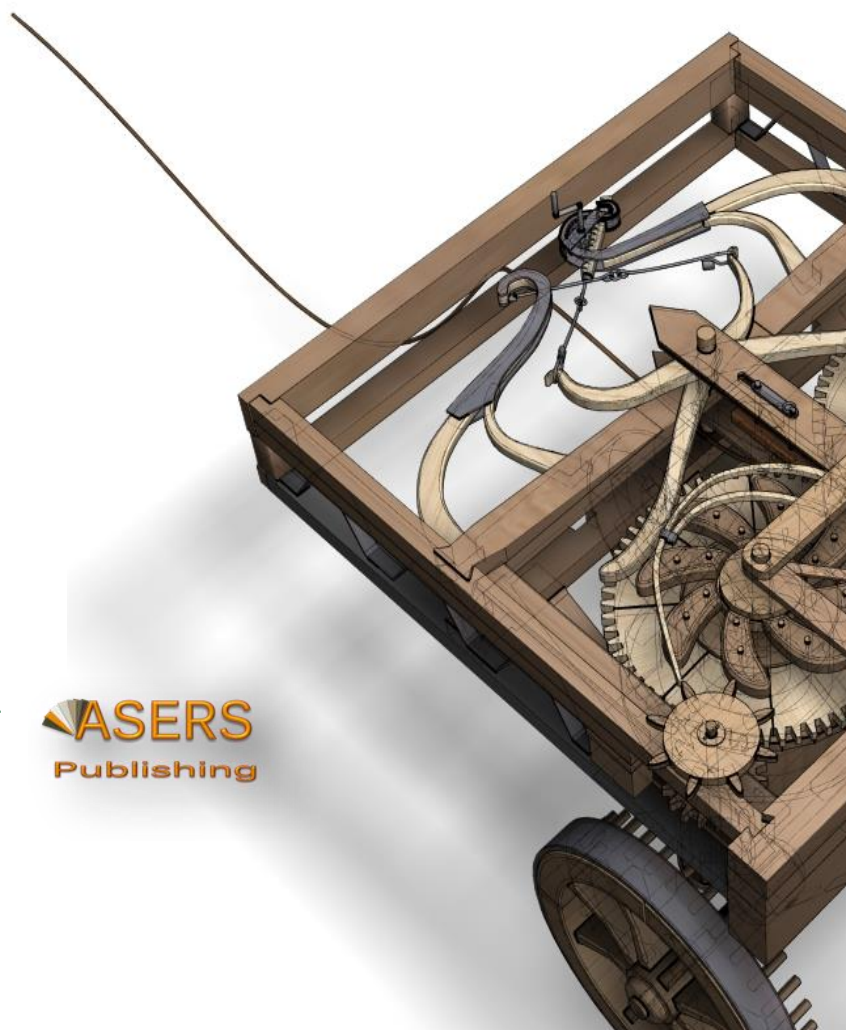
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Journal of Environmental Management and Tourism is an interdisciplinary research journal, aimed to publish articles and original research papers that should contribute to the development of both experimental and theoretical nature in the field of Environmental Management and Tourism Sciences.

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Competitiveness of Milk Production. New Perspectives for Developing a New Direction in Tourism: Dairy Tourism

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Abstract:

The presence of natural and economic risks in agriculture is inherent in many countries, including the Republic of Kazakhstan, which makes the development of the agricultural sector an urgent issue for agricultural producers, especially now when the integration of agro-tourism, which is a kind of breakthrough for the development of rural industry and the revitalization of rural areas, takes place. Integration of agro-ecological efficiency and agrotourism is also closely connected with the competitiveness of milk production by farms and the development of a new direction "dairy tourism", so the study of the relationship between them is of great importance for the implementation of agro-ecological quality development. Kazakhstan has favorable conditions for the development of dairy tourism sector due to the area of cultivated agricultural land, favorable natural and climatic conditions, large volume of dairy products market, positive trends in economic development of the country and, as a consequence, growth of solvent demand, which makes the dairy sector attractive. The aim of the research is to substantiate theoretical provisions and analyze the impact of agrotourism on the efficiency of dairy production competitiveness management in farms (on the example of the northern region of Kazakhstan).

Keywords: dairy tourism; agrotourism; agribusiness; agricultural products; tourism; competitiveness.

JEL Classification: Z31; Z32; R11.

Introduction

Familiarity with the processes associated with the production, processing and marketing of milk and dairy products can be attributed to dairy tourism. However, we note that many studies have not analyzed dairy tourism. This is a gap in research that this article seeks to fill in order to broaden our understanding of the relationship between "dairy products" and "tourism." This study defines the term "dairy tourism" as food tourism with a particular focus on elevating natural resources to a tourism dimension (Everett and Slocum 2018).

Everyday tourism connects communities and tourism through dairy products. In this study, "dairy products" are understood as a relevant food landscape and part of a destination's food tourism system. Dairy products are foods that convey to tourists the cultural and natural characteristics of a destination. The development of this typology begins with an understanding of the dairy industry as an example of food practices and culinary landscapes.

In particular, the production of milk and its derivatives goes back thousands of years. Each region produces products that are authentic and distinctive, with dairy characteristics that cannot be copied elsewhere. Dairy liver is made from milk obtained from animals grazing on a particular plot of land and has unique characteristics of that particular region. For example, cheese made with cow's milk from the Catalan Pyrenees is different from cheese made with cow's milk from the Swiss Alps. Even cheeses produced in summer and winter are different because the diet of the animals changes according to the weather. This then transfers to milk and cheese, which also carry seasonal flavors (Fusté-Forné 2019).

Moreover, the motivation for visitors to handmade dairy products is not only food tourism per se, but also cultural tourism (production methods), see Garibaldi and Pozzi (2018), nature tourism (animal habitats) and, more generally, rural tourism (Skordili and Tsakopoulou 2019). This also includes pull factors related to other types of tourism, such as dairy farming, which plays an important role in the European economy.

1. Literature Review

The problems of the impact of tourism on economic growth have been studied by many scholars, however, according to the author, we can note a number of authors who have made some contribution to the study of this topic, including Alfaro Navarro *et al.* (2020), Antonakakis *et al.* (2019), Calero and Turner (2020), Cheng and Zhang (2020), Estol and Font (2018), Neuts (2020), Nunkoo *et al.* (2020), Roudi *et al.* (2019), Santamaria and Filis (2019), Sokhanvar (2019), Tang and Tan (2018), Tang (2020), Vergori and Arima (2020).

Tourism is an important factor influencing: global economic growth, environment, sustainable development and contribution to scientific and technological progress. Of course, the development of tourism depends on a number of economic, social and infrastructural factors, including:

- transport (Borodako and Rudnicki 2019);
- geopolitical conditions (Santamaria and Filis 2019);
- foreign direct investment;
- culture, security, infrastructure, natural environment, population, number of tourists, education, income and price levels (Khan *et al.* 2020);
- the possibility of land development and development of the area (Lin *et al.* 2019);
- factors related to economic growth and development (Nunkoo *et al.* 2019).

Tourism development is one of the fastest growing sectors of the global economy and is characterized by significant economies of scale, which requires finding appropriate market mechanisms to enable the tourism industry to function effectively.

Recently, recreational tourism (Fengbiao Shang, Wenjie Zhu 2022) has become more and more popular, due to the continuous development of society and the improvement of people's living standards, emphasizing agricultural landscapes, agricultural experiences.

In their study, Marcis *et al.* (2019) describe organic farming as the most sustainable for nature because it produces less aerosol pollution, emits less carbon dioxide, prevents the greenhouse effect, produces no polluting waste, and helps save energy for both crops and products used.

Some areas, such as Singapore's Agricultural Parks, seek to develop and utilize limited land in an integrated way, investing heavily in infrastructure development, making their parks more attractive. Moreover, they can be carefully mapped as peculiar agro-ecological corridors with tourism functions, providing fresh produce and forming multifunctional ecological farming systems (Turner *et al.*).

According to Sigalat-Signes *et al.* (2020), agritourism is a new form of agriculture that successfully integrates local economies, cultural characteristics and biological ecology. In addition, many tourists from all over

the country can experience the ecological and natural beauty of the rich historical and cultural atmosphere and understand the remarkable traditions and spirit of the people during recreation and entertainment.

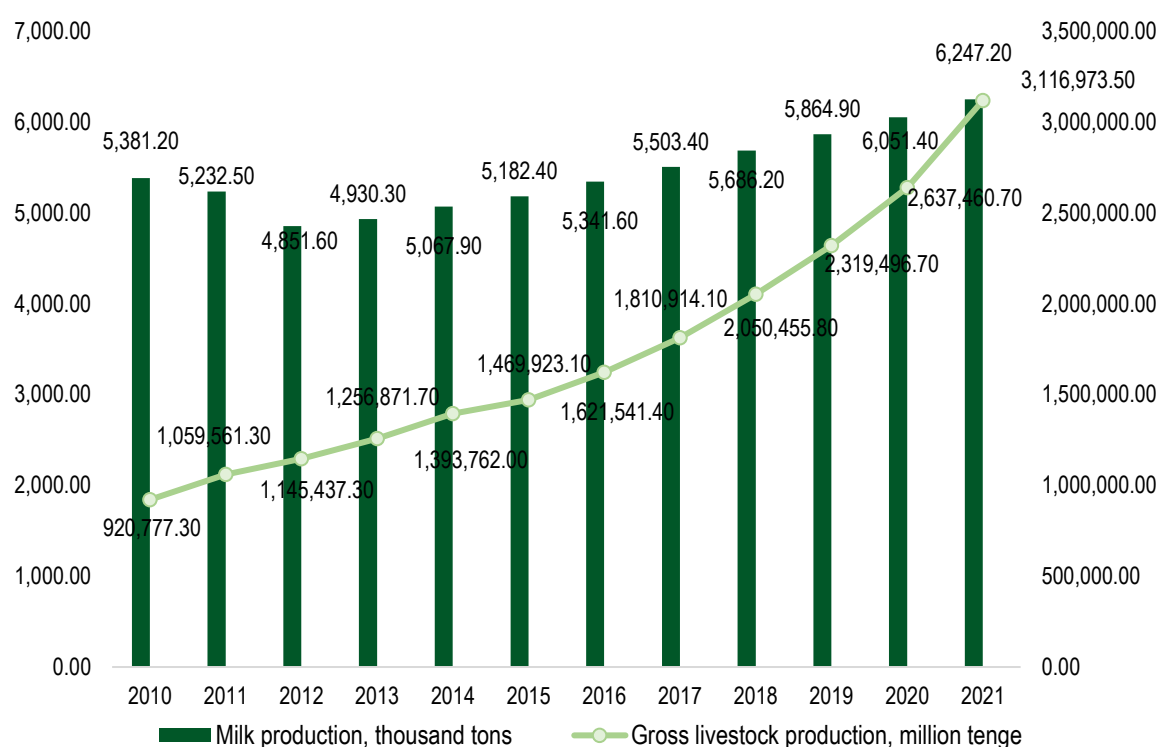
Despite of a lot of existing mechanisms and models that have proven their productivity in other countries, the peculiarities of socio-economic structure of our country require the development of management in the formation of innovative activities of enterprises in various spheres of activity, including tourism. Tourist organizations in the market economy are increasingly aware of the need to develop new products and services and the economic benefits associated with it. Kazakhstan, which has a unique natural and cultural potential, as well as great national and international interest as a new tourist destination, has every reason for innovative development of the tourism industry.

2. Indicators Characterizing the Dairy Industry in Kazakhstan

The development of the industry is greatly influenced by the measures taken by the Government for state support of agricultural producers, as well as the implementation of investment projects in the agricultural sector, provided mainly by the coordinated work of farmers and agricultural producers.

Over the past 5-7 years cattle breeding has been actively developing in the northern regions, in particular, with the support of the state the breed composition of farm animals is being transformed. For example, the gross production of livestock products and milk shows a systematic increase in the indicators that characterize this industry (Figure 1).

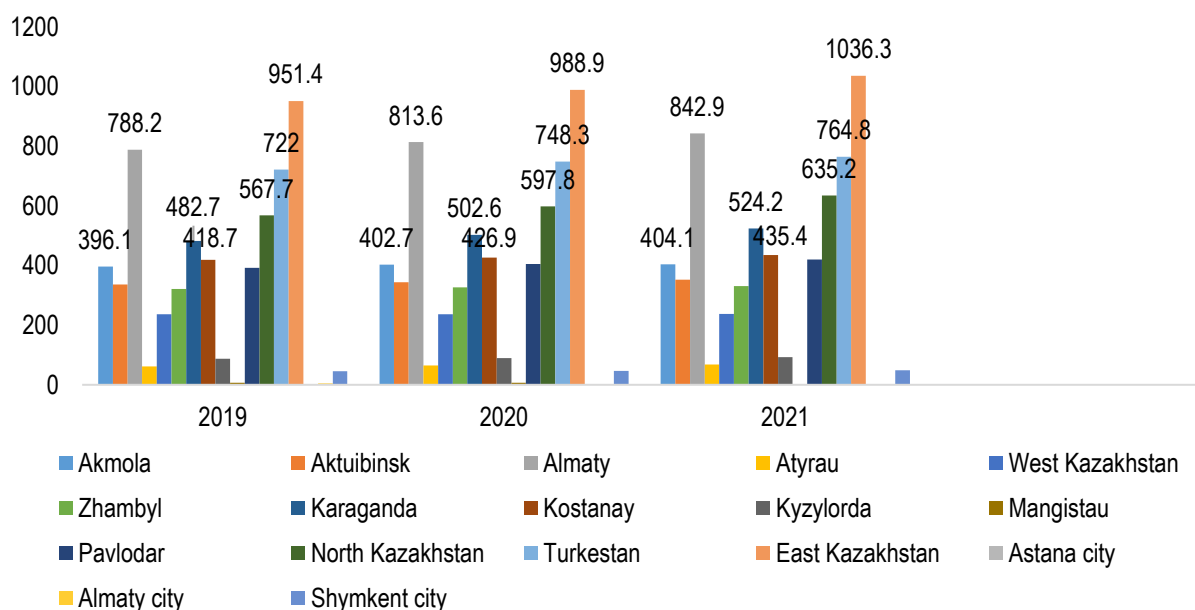
Figure 1. Indicators characterizing the dairy industry, Republic of Kazakhstan, 2010-2021



Source: compiled by authors according to <https://www.stat.gov.kz>

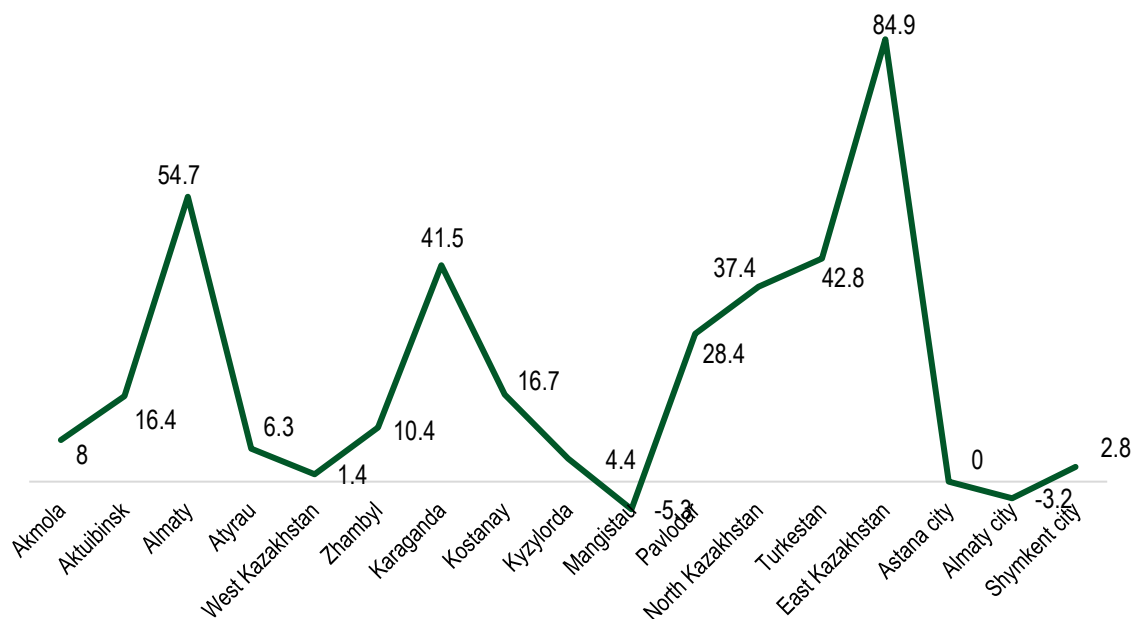
The changes that have taken place in the regions of Kazakhstan for 2019-2021 indicate that such regions as East Kazakhstan, Almaty, Karaganda and North Kazakhstan regions have the largest amount of milk production, which characterizes this industry (Figure 2 and Figure 3).

Figure 2. Analysis of milk production, Kazakhstan, 2019-2021, thousand tons



Source: compiled by authors according to <https://www.stat.gov.kz>

Figure 3. Dynamics of changes that have occurred in the production of milk, Kazakhstan, 2019-2021, thousand tons



Source: compiled by authors according to <https://www.stat.gov.kz>

The top five in the production of milk of all types in the regional context include East Kazakhstan, Almaty, Turkestan, North Kazakhstan, Karaganda. This is characterized by the data presented in Table 2. Table 2 shows that milk and dairy production is not increasing in all regions of Kazakhstan. This is due to the fact that almost 70% of the country is located in a continental climate zone, where the temperature difference between day and night is extremely high, and cattle have to be kept in stables for five months in the south and more than seven months in the north during the cold season, which certainly leads to increased costs for farms.

Table 2. Production of milk of all types in the regional context for the period from 201-2021, thousand tons

Region	2014	2015	2016	2017	2018	2019	2020	2021
Republic of Kazakhstan	5.067,9	5.182,4	5.341,6	5.503,4	5.686,2	5.865,1	6.051,4	6.247,2
Akmola	351,4	360,6	378,6	385,3	387,4	397,9	404,7	406,2
Aktuibinsk	301,8	302,0	307,1	315,4	327,6	338,0	345,4	354,3
Almaty	672,2	684,2	696,9	723,4	758,0	792,8	818,2	847,5
Atyrau	65,7	58,8	61,3	62,1	63,2	63,6	66,7	70,3
West Kazakhstan	224,6	226,4	227,6	231,9	234,9	236,8	237,2	240,3
Zhambyl	290,1	294,7	297,6	306,2	315,0	323,6	329,2	334,1
Karaganda	388,4	408,7	436,2	456,7	472,6	490,2	510,7	531,9
Kostanay	359,6	375,7	380,2	384,1	410,0	420,4	428,7	437,2
Kyzylorda	85,8	87,5	88,6	89,8	91,6	93,9	96,1	98,7
Mangistau	8,8	9,2	10,9	11,7	12,4	12,5	12,5	7,4
South Kazakhstan	699,9	710,6	721,7	734,4	-	-	-	-
Pavlodar	355,0	361,7	364,4	371,0	383,1	393,2	405,7	421,3
North Kazakhstan	473,3	504,1	525,6	546,1	555,1	566,6	597,9	635,3
Turkestan	-	-	-	-	706,6	730,2	756,5	772,9
East Kazakhstan	778,1	792,4	839,3	879,6	917,7	954,3	991,9	1 039,0
Astana city	1,7	0,6	0,5	0,5	0,4	0,2	0,2	0,2
Almaty city	11,5	5,2	5,1	5,2	5,2	5,0	2,6	1,8
Shymkent city	-	-	-	-	45,4	45,9	47,2	48,6

Source: compiled by authors according to <https://www.stat.gov.kz>

The extremely low availability of natural water and low rainfall (less than 400 mm/year) in remote pastures in the south and west are additional constraints to livestock development, which, in particular, impede the proper development of mobile livestock production. In addition to natural factors hindering livestock development, there are problems in technology, skills, methodology, finance, and human resources. Therefore:

- a comprehensive assessment of the adaptability of cattle imported into Kazakhstan from other countries is needed;
- expanding the area of forage crops not only ensures the production of valuable fodder, but also improves long-term soil fertility;
- state support for pasture management, for example, by restoring wells in remote pastures for pasture land use.

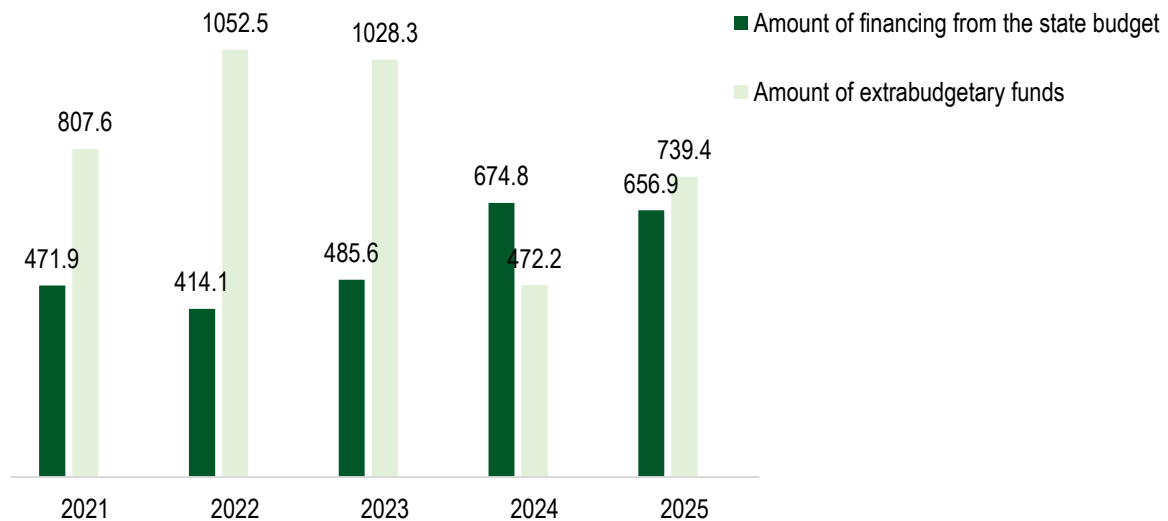
The State project on the development of agro-industrial complex of the Republic of Kazakhstan for the period 2021-2025 has ambitious and undoubtedly useful for the economy goals aimed at creating a competitive agro-industrial complex by increasing labor productivity by 2.5 times, doubling exports and providing socially important domestic food products. Until 2022 a total of 414.1 billion tenge was allocated for the implementation of national projects - 231.3 billion tenge from the state budget and 182.8 billion tenge from local budgets. Planned extrabudgetary funding (private investment) amounts to 1,052 billion tenge; as a result of an increase in budget needs for 2022 from the approved basic quota for national projects actually allocated 651.1 billion tenge (2.5 billion tenge more than planned - 460.1 billion tenge from the national budget and 191 billion tenge from local budgets, which is 37 billion tenge more than planned).

In 2022, about 451.1 billion tenge are provided to support the agro-industrial complex in the form of subsidies (in 2021 - 372.5 billion tenge), from the republican budget - 260.8 billion tenge and from the local budget - 190.3 billion tenge, including number on:

- crop production - 116.9 billion tenge;
- livestock - 126.4 billion tenge;
- financial instruments and processing - 207.7 billion tenge.

More than 95% of subsidies are received by agribusiness entities located directly in rural areas (Figure 4). In the agricultural sector of Northern Kazakhstan, 31 projects worth 76 billion tenge are under implementation, with an expected investment volume of 180 billion tenge by 2023. To date, 2,400 units of agricultural equipment have been purchased, 17 dairy farms, three poultry farms, greenhouses and an oil extraction plant are under construction. In industry, a brick factory and dairy plant were opened in 2022.

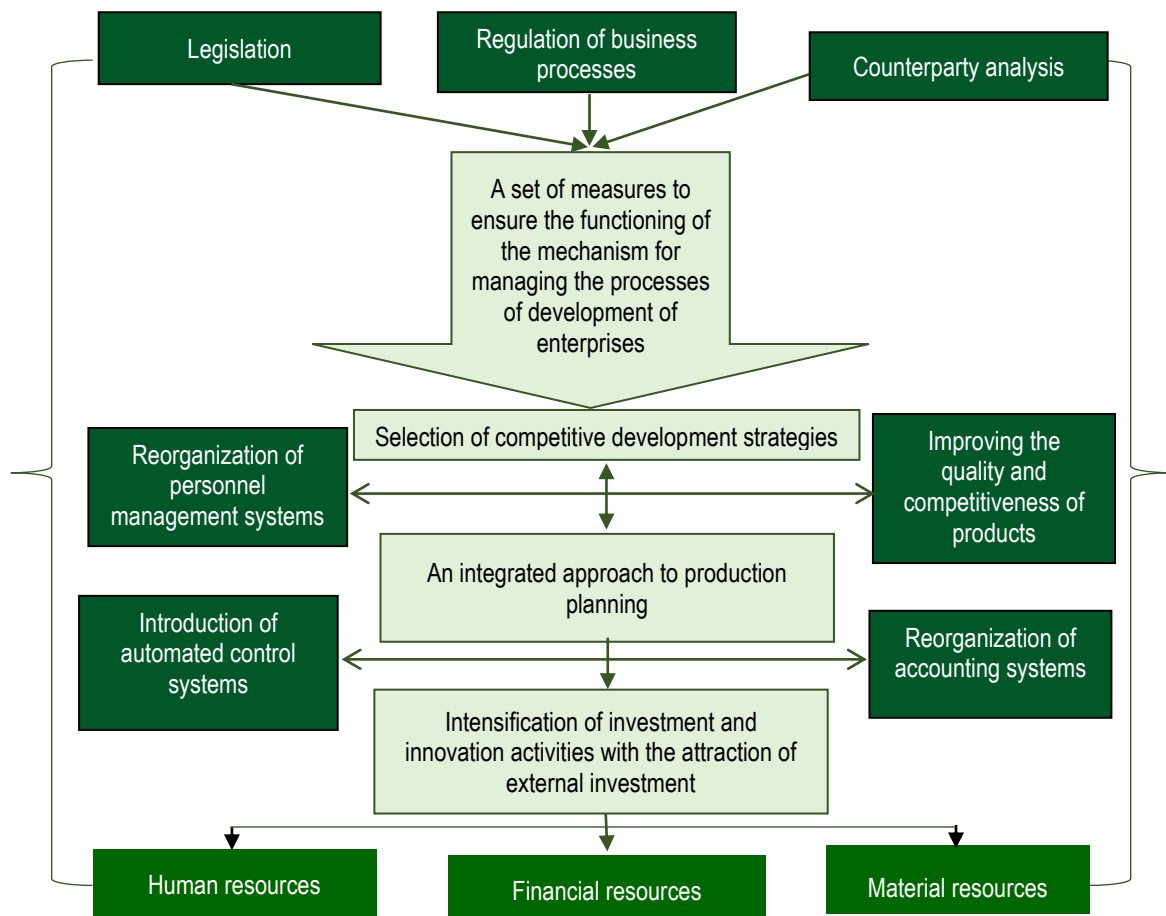
Figure 4. Required funding for the implementation of the national project for development of the agro-industrial complex, Kazakhstan, in billion tenge



Source: compiled by authors according to <https://primeminister.kz/>

Successful modernization strategy and market development in the dairy industry requires the development of strategic solutions, operational and tactical decisions necessary to formulate an optimal economic strategy for the company (Figure 5).

Figure 5. The mechanism for managing the development processes of dairy industry enterprises



Source: compiled by authors

Analyzing the market of milk and dairy products, Tekenov *et al.* (2020) reached to the conclusion that effective methods and tools are needed that contribute to the formation of a rational strategy for the development of dairy enterprises, as well as the need for practical application of management theory tools and a process-oriented approach, which will allow the implementation of a mechanism for end-to-end management of production business processes of the enterprise. Such research results are caused by the fact that internal and external investment in the dairy industry of Kazakhstan is carried out, both from foreign and domestic investors. Data on investment in the dairy industry are presented on the materials of the North Kazakhstan region (Table 3).

Table 3. Internal and external investment in the dairy industry, North Kazakhstan region

№	Project	Investor's country	Start date	Withdrawal date	Jobs	The cost of the project, million tenge	Current status
1	Modernization of the dairy plant	Kazakhstan	2020	2022	120	10.000	Put into operation
2	Dairy Plant Expansion	Kazakhstan	2022	2022	40	5.500	SMR
3	The plant of deep processing of dairy products in the village of Saumalkola	Kazakhstan	2021	2022	40	750	Put into operation

Source: compiled by authors according to Results of 2022: Production growth for all types of agricultural products, <https://www.gov.kz/>

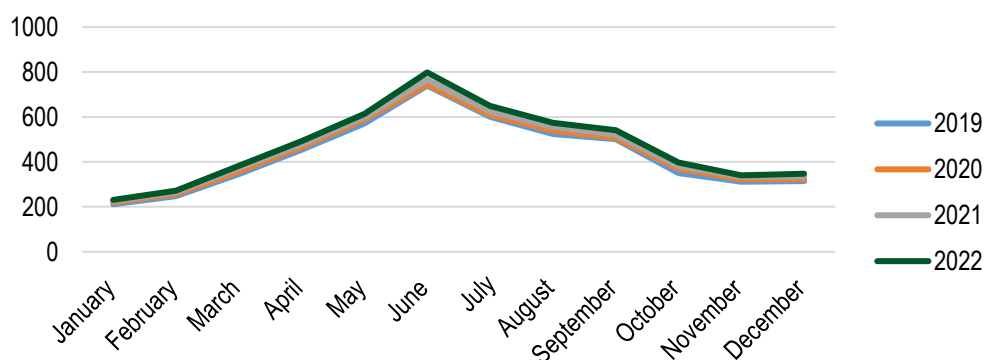
3. Agritourism Integration as One of the Ways to Integrate Rural Industry

The integration of agrotourism is an important way to integrate rural industry, expand farmers' income sources, promote the transformation, modernization of rural areas, and promote the continuous enrichment of the tourism industry and the expansion of the production chain.

The synergetic development of agriculture and tourism is an important element and the main way to accelerate the revival of rural areas and deepen the structural reform of supply. In addition, the integration of agrotourism not only develops vigorous support for agriculture and tourism, but also has great practical significance for the creation of new branches of agriculture and achieving ecological viability. Business practice requires companies to introduce innovations and optimize the production of goods and services, where the main background of this change is the formation of a new entrepreneurial culture, order and method of coordination and interaction between the subjects of innovation (Omarova *et al.* 2021).

The integration of agrotourism is a breakthrough for the prosperity of rural industry and the revitalization of rural areas, thereby the development of the so-called "dairy tourism". In addition, the ecological efficiency of agriculture and the integration of agrotourism are closely linked, and the study of the relationship between them is important for qualitative agroecological development. The dynamics of dairy productivity of cows is seasonal and coincides with the natural period of reproduction of cows in winter and spring. It can be noted that milk has more production in the summer months than in the winter months (Figure 6).

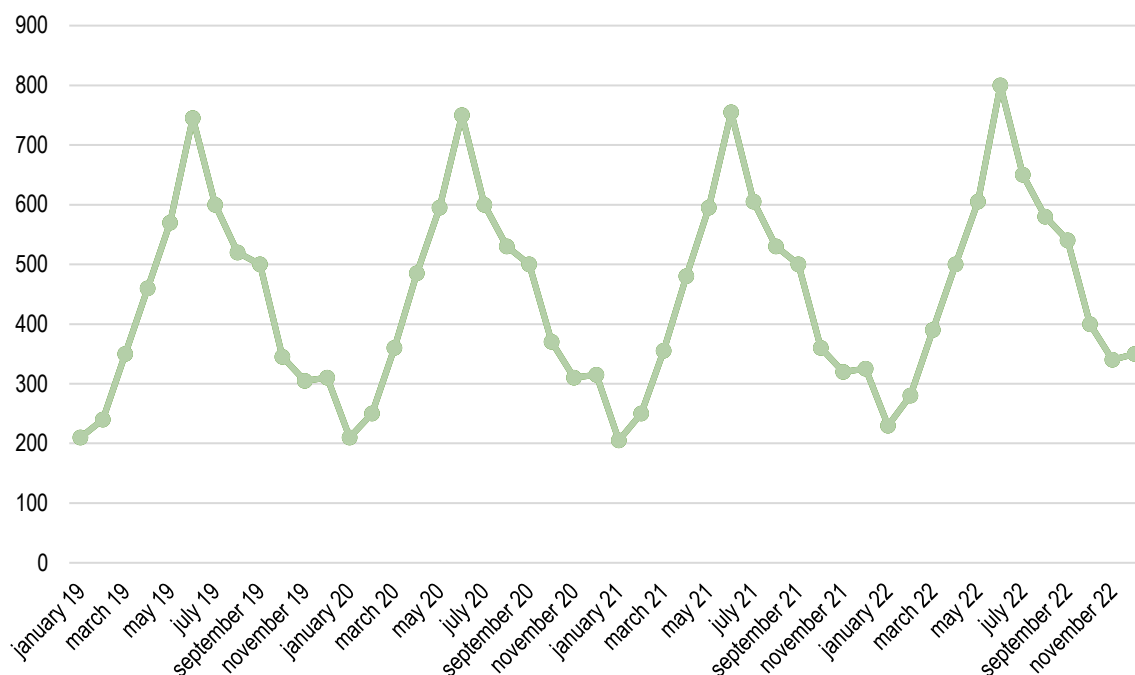
Figure 6. Milk production in Kazakhstan in 2019-2022 by months, thousand tons)



Source: compiled by authors

Let's calculate the predicted value of milk production in 2023. To do this, it is recommended to use trending seasonal models. To consider seasonal fluctuations in the production of milk and dairy products, we use the trend-seasonal component (Figure 7).

Figure 7. Dynamics of the volume of milk produced in the Republic of Kazakhstan, 2019-2022, thousand tons



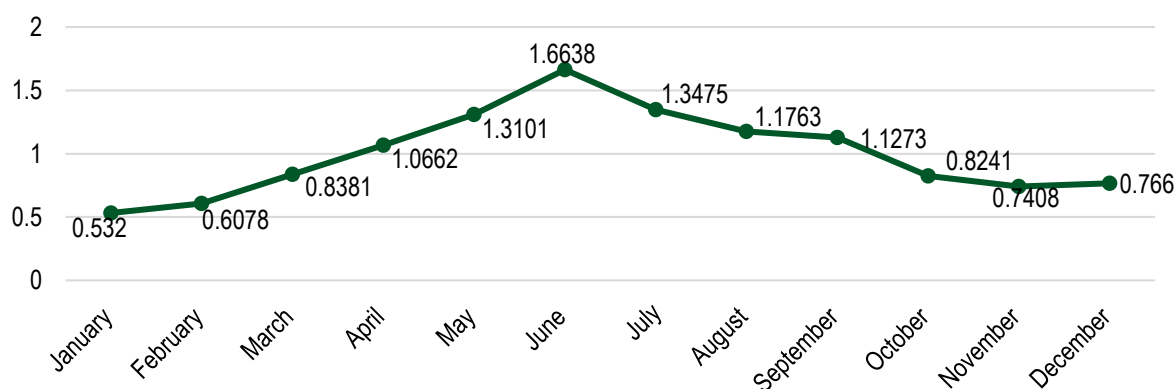
Source: compiled by authors

Monthly indicators of milk production and dairy products are taken as a basis, as a result of which a multiplicative model of seasonal fluctuations is built:

$$Y = T \cdot S \cdot E \quad 3.1$$

The forecasting process includes certain sequential stages necessary for making a forecast taking into account seasonal fluctuations (Figure 8).

Figure 8. Monthly seasonal component



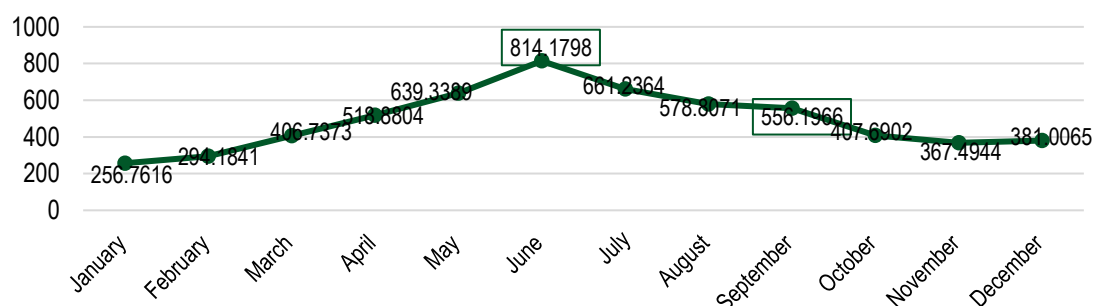
Source: compiled by authors

The linear trend equation is constructed:

$$T = 416,9416 + 1,3410t \quad 3.2$$

The results of the multiplicative model show 99% of the total spread of the time series levels. The final forecast values of milk production in 2023 are shown in Figure 9.

Figure 9. Forecast values of the volume of milk produced in the Republic of Kazakhstan, 2023, thousand tons



Source: compiled by authors

As a result of the analysis, the authors came to the conclusion that effective methods and approaches are needed to manage the production business processes of dairy industry enterprises, as well as the development of new areas of the tourism industry - dairy tourism, as one of the forms of competitive dairy industry.

Conclusion

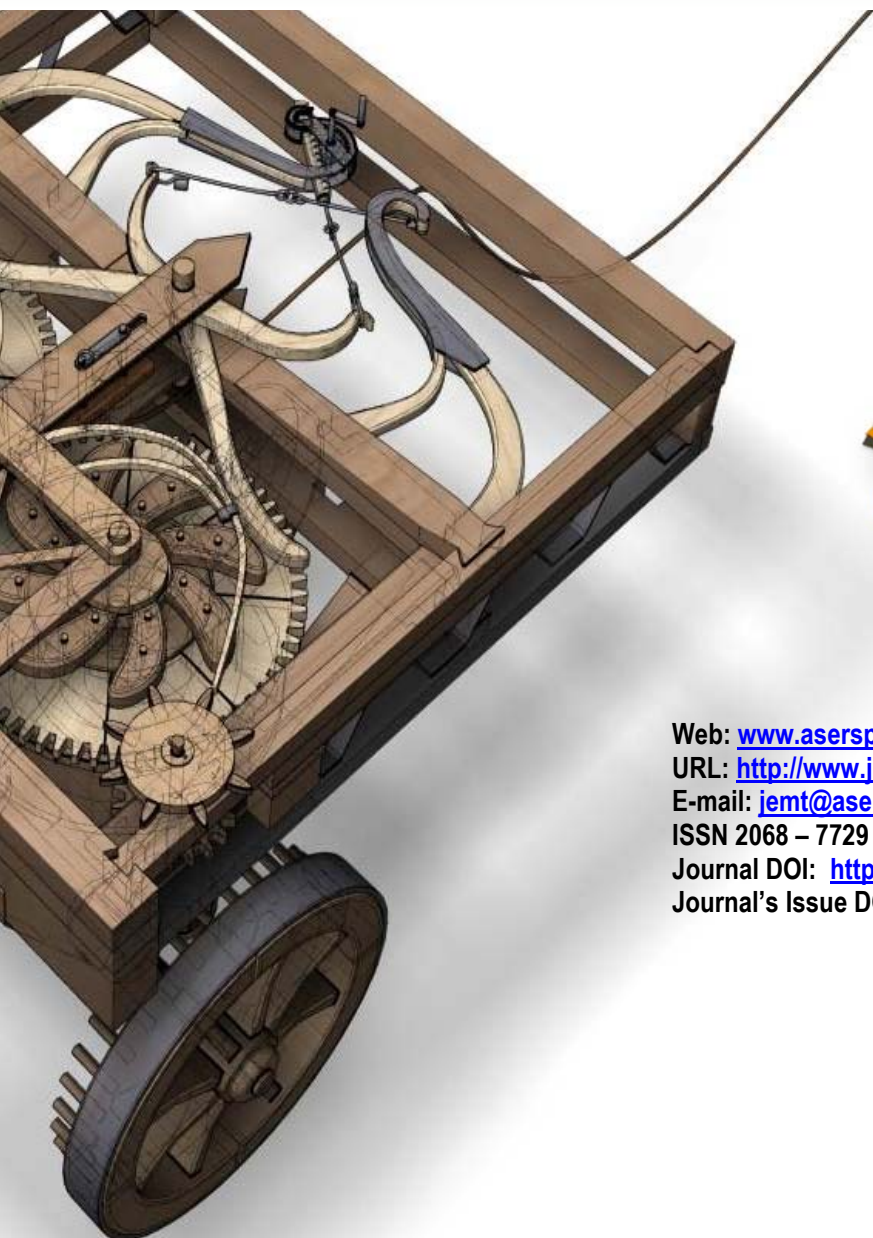
An analysis of the capacity of the Kazakh dairy market shows that it has potential growth reserves in terms of consumption and production. The development of the industry is ensured mainly due to the coordinated work of farmers and the measures taken by the Government to provide state support to agricultural producers, as well as the implementation of investment projects in the agro-industrial complex.

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