QUALIMETRIC EVALUATION OF THE NATIONAL MARKET STRUCTURE OF DAIRY PRODUCTS IN UKRAINE

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Abstract. The state and features of sour-milk products in the national market of Ukraine are examined in the article. The qualimetric evaluation of its structure is also made. The innovative and technological directions of the development of dairy branch in Ukraine are offered and proved. Among them there are the harmonization of the standard-technological base, the improvement of raw-material base and the introduction of the new ways of processing and / or the use of dairy raw materials. The most significant direction is the formation of innovative assortment group due to the development of special types of sour-milk products with the increased nutritional value. The increase of a nutritional value of sour-milk products is possible due to the introduction of vegetable fillers into a sour-milk basis which also improve its traditional organoleptic characteristics. The support of innovative development in the sphere of the food industry from the state and local government is proved among further prospects of the solving the covered problems.

Keywords: qualimetric evaluation, food science, dairy products, market structure, Ukraine.

Introduction

Sour-milk products are the most useful and available products known to mankind. They are dietary thanks to high assimilability, stimulation of secretory activity of a stomach, they create a friable clot or flakes, that is readily available effects of digestive enzymes.

The high nutritional value of sour-milk products causes the annual growth of the world market of milk and dairy products, however the rates of its growth aren’t really high. The reasons for that are the natural restrictions of the raw material base, the economic difficulties, and also the unfavourable weather conditions noted in many countries of the world in the last years. Annual world production increases from 1% to 3% (Kolpakova, 2012).

Sour-milk and dairy products are strategic products which form food safety of any state. The national market of sour-milk products is an integral part of the world market. According to the World Dairy Forum (UCAB, 2012), Ukraine is included in the list of European countries, which due to natural conditions have significant prospects for the development of the dairy industry. For Ukraine, as the country which is not only the leading producer of milk and dairy products, but which also takes the leading positions in export of dairy products and which is the active partner of the countries-exporters of dairy products, the questions of the evaluation and regulation of the development of the national dairy market are still actual.

The actuality of the studied problems is confirmed by the works of foreign and domestic scientists such as O.N. Mussina, A.M. Illyina, G.S. Komolova, L.V. Golubeva, A.N. Ponomareva, A.A.Merzlikina, I.A. Yevdokimova, V.O. Morgun, N.A. Didukh, V.V. Kiyko.

The purpose of the work is the qualimetric evaluation of the structure of sour-milk products in the national market and the offer of the innovative-technological directions of its development with the help of formation of innovative assortment group.

For the achievement of the goal it is necessary to solve the following problems:

- to characterize the features of the dairy market in Ukraine;
- to prove the high popularity of dairy products;
- to organize the marketing research of dairy products assortment;
- to analyse the results of the marketing research;
- to single out the innovative-technological ways of solution of the existing problems in the market of dairy products;
- to offer the development of dairy products market in Ukraine through the formation of innovative assortment group.
Method.

The following methods were applied to achieve the objective of the research. To reveal the peculiarities of milk and dairy products market and also its dependence on import the monitoring of the national market was done with the help of the desk research method and the analysis of a secondary information from various sources. The second method represents the expert interviews of the respondents having special skills and experience in certain professional activity (company managers, branch analysts, journalists, etc.).

The problems of milk and dairy products national market and the formation of innovative-technological ways of its solving were studied by the methods of analytical research.

The marketing research of sour-milk products assortment in the retail network of settlements in the territory of Donetsk region was done by the methods of observation and interviewing which tend to exploratory researches, i.e. which carried out with the aim of collecting the preliminary information that is necessary for the best definition of the problems and hypotheses within which the realization of marketing activity is expected, and also for specification of terminology and for the establishment of the priorities among the research problems.

The statistic and the dynamic analysis of the environment factors allowed to reveal the tendencies of its development and to define the level of possible changes in the national market of sour-milk products.

Besides, the calculation of quantitative indices was carried out by mathematical methods.

Results.

The performance of the research purposes leads to the following results.

The market of milk and dairy products has the specific features connected with the characteristic of a product (Fig.1), and thanks to its features promote the formation of a specific market model of milk in Ukraine.

![Fig. 1. Specific features of the market of milk and dairy products in Ukraine](image)

It is necessary to note: one of the features of the dairy products market in the country is the wide product assortment including different types of whole-milk and sour-milk products, cheeses, sour cream, butter and other. Besides, dairy products have universal nature of use. For example dairy raw materials, dairy products of primary processing and dairy products of deep processing are made from it. The problematic character of functioning the milk and dairy products market consists in low transportability and unfitness for a long storage of many types of dairy products. Seasonal fluctuation of raw materials supply influences on irregular capacity of milk-processing plants power, decline in work productivity, additional expenses on storage of raw material stocks and ready-made products. In addition, the specifics of milk and dairy products market is connected with a big share of market agents in primary market (the agricultural enterprises, farms, personal farms of the population), siftings from is a need of providing a stable sales market for the producers during the whole year, the guaranteed supply of raw materials on processing enterprises and also uninterrupted providing of population with dairy products as convenience goods (Feday, 2011).
The studied features of milk and dairy products market cause the volumes of their production and consumption. Dynamics of the production and consumption of milk and dairy products in Ukraine is given in figure 2.

![Dynamics of production and consumption of milk and dairy products in Ukraine](image)

Fig. 2. Dynamics of production and consumption of milk and dairy products in Ukraine (Sukmanov, Malygina and Kiyko, 2013)

The researches of the dynamics of production and consumption of milk and dairy products in Ukraine allow to note the insignificant change of dynamics towards worsening till 2011, namely decrease in outputs from 263.6 kg in 2007 to 242.5 kg in 2011 (8%, on average 1.6% a year). The similar situation was observed in volumes of consumption (reduction 8.7%, on average 1.7% a year). Insignificant change of dynamics in production and consumption of milk and dairy products towards positive side took place in 2012 (from 242.5 kg to 249.5 kg and from 204.9 kg to 214.9 kg per one person correspondingly) and continues until now. These fluctuations in volumes of production and consumption of milk and dairy products are connected with the above-mentioned features of the national market of these products. Little changes in volumes of consumption tell about high level of their popularity which is caused by their high consumer and nutrition value.

High popularity of sour-milk production causes also an appropriate level of its falsification. According to the results of State consumer inspection of Ukraine which has been carried out in 2013, it was rejected and removed from realization about 40% of checked foodstuffs (Shulgina, 2013). And what is important, the greatest share of defective production is the share of fruit and vegetable, meat and milk products.

The market of sour-milk products in Ukraine is in the balanced state. It means that the population of the country consumes as many sour-milk products as they are from abroad. And what is more important, in case of change in volumes of output or consumption, the level of production and consumption will change respectively at the same time. Consumers use as many sour-milk products as how many them are in the country.

The peculiarities and problematics of sour-milk products market in the country caused the necessity of carrying out the marketing research of sour-milk products assortment in the retail network of settlements in the territory of Donetsk region during the spring and summer period.

According to the results of the conducted research it is possible to state: 80% of sour-milk products assortment in Ukraine are presented by traditional sour-milk products among the Ukrainian consumers for many years. However, there are new assortment groups (milk drinks, national products, etc.) which on average occupy 20% of the national market of sour-milk products.

There is a renewing and redistribution of separate types of sour-milk products. It should be noted that new assortment positions appear in the domestic market due to foreign producers. A renewing of the assortment groups happens thanks to the innovations in the sphere of technological processing of dairy products ingredients and expansions of raw materials base for production.

The situation concerning the increase in the share of new sour-milk products market is explained by the increase in percent of import dependence which in comparison with 2011 correspondently increased (from 2.7% to 4.2%). Import of milk and sour-milk products in 2012 in terms of the main product (according to Public Service of Statistics of Ukraine) was 401 thousand tons at the capacity of the domestic market – 9 797 thousand tons (MEU, 2013).
Among the main importers of sour milk products (maslyanka, cream, kefir, yoghurts) the leading position takes the Russian Federation, the volumes of its deliveries to Ukraine make 97.7% of the total amount. The main suppliers are the Russian multinational companies (Danon, Campina, Onken, Ermann). From Europe considerable volumes of import are delivered by Germany and France, in the long term the growth of import volumes is expected from Austria and Italy.

The above-mentioned facts explain the decrease in output volumes of some national producers of sour milk products (Table 1).

<table>
<thead>
<tr>
<th>Enterprise Location</th>
<th>Location</th>
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<tbody>
<tr>
<td>Pr.C. “Galichina”</td>
<td>Lvov region</td>
</tr>
<tr>
<td>Pr.C. “Donetsk SMP № 2”</td>
<td>Donetsk</td>
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<tr>
<td>Sh.C. “Complex Predneprovsky”</td>
<td>Dnepropetrovsk</td>
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<tr>
<td>Pub.C. “Kremenchugsky SMP”</td>
<td>Poltava region</td>
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<tr>
<td>Pub.C. “Galakton”</td>
<td>Kiev</td>
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The data in Table 1 show that the geography of decrease in production of sour milk products covers the whole territory of Ukraine. Besides, according to some authors (Vysochin, 2013), there are all reasons to speak about import dependence problem in the market of foodstuffs in general.

The received results of the researches have also the debatable moments.

**Discussion.**

From the point of view of the national food market researchers (Vysochin, 2013), the present state of the national market demands the development of the measures directed on the support of the Ukrainian producers. The main attention has to be paid to the stimulation of a consumer demand for domestic goods. Along with the direct measures for stimulation of a consumer demand (the growth of the real income of the population), it is necessary to develop instruments of indirect influence, in particular, through the influence on consumers preferences by promotion of the domestic goods. With the purpose of the creation of the conditions under which the production of the Ukrainian producers will be properly presented in the consumer market and will be available at the price, it is necessary to fix at the legislative level the obligatory requirement to the existence in the assortment list of trade objects of a certain share of socially significant goods of a domestic production and to focus efforts on the support of the regional level producers.

The competition strengthening at the milk market and the delay of the growth rates of the national market force the enterprises to look for the ways for further development (Fig.3), first of all, in the innovative and technological direction of the dairy branch development.

The innovative-technological directions of the development of the milk branch will include three ways. Harmonization of standard-technological base is possible due to unification and adaptation of the normative documents connected with the projecting, planning, production and utilization of the dairy products. Realization of the development of the dairy products industry by the way of technological innovations has to include the improvement of a raw materials base and the introduction of the new ways of processing and the use of dairy raw materials. Without innovative assortment groups there is impossible an increase in the production of the domestic dairy products and the increase of their competitiveness in the market of food-stuff of Ukraine.

As it was noted above, the new types of sour-milk products appear in the national market thanks to transnational producers from abroad and only in some period of time the production of such products start national, regional and local enterprises. Taking into account the way of innovative assortment groups of sour-milk products and the requirements of modern consumers, it is necessary to help local producers to be the first in presenting the new sour-milk products on the regional market. Their production and realization almost at once will find positive reaction of the consumers and will help local producers to be in a segment of innovative sour-milk products and to develop intensively. It becomes possible thanks to current trends of innovative assortment policy of the famous multinational companies and reasonable and scientific developments in merchandizing and in food industry in general.

Both, the consumers and the consumer market, need goods of renewing assortment, not only of high quality and safety, but with the concrete properties, capable to satisfy the needs of people of various social groups, of different age and state of health, without risk for their life.
In spite of the worsening of a health state of the population in Ukraine, the decrease in the quality of life, the sharp decrease in the consumption of biologically valuable products and the low level of dietary culture, a large number of special products of nutrition is delivered on the market of the country nowadays. Introduction of these products on the market, unfortunately, isn’t always accompanied by the objective information about them. Such situation causes the necessity of educational activity both among the consumers and among the experts.

Taking into account the above – mentioned information, when studying processes of transformation of the national market of foodstuff, in particular, the market of sour-milk products, we addressed to the diversification strategy, namely, to the model of diversification of the assortment line of production. Within this work it was developed the assortment line of innovative sour-milk products which take into account the needs and the requirements of the consumers. All the developed products are protected by the declaration patents for the useful model of Ukraine, concern the dairy industry and can be used in the production of sour-milk products with vegetable fillers at dairy plants and at the enterprises of the hotel and restaurant business.

So, it is possible to state: the national market of milk and dairy products of Ukraine has specific features, and its current state is characterized by balance, with certain degree of increase in the import dependence. As the considerable share of import sour-milk products consists of the new assortment types, one of the ways of innovative and technological development of the country is the formation of the innovative assortment groups of production for regional producers. It will allow them to develop successfully in the regional dairy market. The qualimetric evaluation of the national market of sour-milk products allowed to allocate the direction of its further development due to the development of a new types of special sour-milks products with the raised nutrition value. Besides, the demand for them increases among the population of the region and of the country in general.

Further development of the stated problem is possible in the direction of the support of innovative developments in the sphere of the food industry from the state and local government as the perspective aspect of the research.

References