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ANALYSIS OF THE POULTRY MEAT MARKET AND JUSTIFICATION OF EXPANDING ITS RANGE

Abstract

Based on marketing research, it has been proven that a third of consumers in the world prefer poultry meat. It is established that the investment attractiveness of the poultry business, the construction of modern large poultry farms and the creation of powerful vertically integrated companies are due to the speed of return on capital investments and the high profitability of the industry. In order to determine the position of Ukraine on the world market, the rating of 45 countries by the level of consumption and production of poultry meat in 2021 was summarized. The traditional leaders in the production and consumption of meat products are the USA, Brazil and China. Ukraine ranks 21st in terms of production and 23rd in consumption of poultry meat. Most countries have a shortage of meat products and can be potential buyers of Ukrainian meat. Ukraine has all the opportunities and prospects for expanding the export of its own products. It is justified that duck farming is one of the modern dynamic areas of poultry farming and a competitive type of agribusiness, as evidenced by its dynamic development. The perspective and dynamism of this poultry farming area is determined by the high fertility and precociousness of poultry. Duck meat markets are not monopolized by large industrial players, which makes it possible to diversify business and avoid excessive competitive pressure. Export opportunities of niche meat producers to EU countries are significantly inferior in terms of volumes to traditional chicken meat, but this market is distinguished by its ability to pay. Ukraine is one of the largest producers of duck meat in Europe. On a global scale, the duck market is 5% of the chicken market. The low level of duck meat production in the world (except Asia) is explained by the seasonality of consumption. The priority task of the development of duck farming in Ukraine is the protection of the domestic market and the development of the export of products to world markets. Industrial production of duck meat in Ukraine should focus on export to Asian and European countries, where this product is in greater demand than at home. It is established that with proper organization the business of raising ducks is economically feasible and practically waste-free. The main products of production are meat, eggs, down and feathers, droppings and duck liver.

Key words: ducks, complete feeds, poultry meat, industrial producers, world consumption and production, niche types of meat products.

Introduction

According to the UN, the population of the Earth will increase by 2 billion people in the next 30 years and reach the mark of 9.7 billion people. In the world 9 countries will account for 50% of population growth over the next 30 years - Pakistan, India, Nigeria, Ethiopia, DR Congo, Tanzania, Indonesia, Egypt and the USA. It is necessary to increase food reserves by 3 times in order to provide such a population with adequate nutrition.

At the beginning of 2022, 190 million people in the world were on the verge of starvation. Today, due to the war in Ukraine, the pandemic and the increase in the cost of energy, their number may increase to 260 million. The violation of food security in the world has the greatest impact on vulnerable segments of the population.

Ukraine is an industrial-agrarian country with a predominance of raw material production. It is one of the leading exporters of some varieties of agricultural products [1]. The food security of the world depends on the export of agricultural products, because Ukraine is a granary for 400 million people.

Agricultural products traditionally occupy the first place in Ukrainian exports. In 2021, Ukrainian farmers exported sunflower oil and grains worth 18.6 billion dollars. World grain prices in 2021 grew rapidly. Some farmers, having a sufficient supply of money, kept their crops in storage. Entrepreneurs expected to sell bread at

an even higher price during the sowing season and paid up [2].

The food security of the world is ensured not only by food grains, but also by fodder. If the amount of the fodder is insufficient, the level of providing the population with animal and fish proteins decreases. Meeting the needs of the population in nutrients is a necessary condition for ensuring life.

Poultry products are the most affordable and widespread products for providing the world's population with animal proteins.

Poultry farming is a branch of agricultural production, the main task of which is the breeding, feeding, keeping of poultry, the use of mechanization, automation of technological processes, veterinary prevention in order to obtain eggs, meat and other products (down, feathers, fatty liver, etc.) with low costs of labor and funds [3].

Breeding of poultry is a very profitable business, what is confirmed by the lowest feed costs per unit of production compared to other farm animals. Feed conversion ratio (FCR) in poultry is 2-3:1, in pigs it is 4-6:1. Biological features of poultry, which have a decisive influence on the technology of production of eggs and poultry meat, are determined by their reproductive qualities, rapid growth at an early age, high fertility, intensive metabolism, reaction to stressful situations, specific structure of the gastrointestinal tract and skin [4].



Complete feeds are needed to increase the production of eggs and poultry meat. They fully meet the needs for nutrients and biologically active substances and allow realizing the genetically laid potential of farm poultry. Requirements for the quality of compound feeds are constantly growing and changing as new, more productive animal breeds and poultry crosses appear.

The use of compound feeds allows you to regulate the consumption of nutrients and biologically active substances by animals depending on their age, sex, purpose and conditions of keeping. In the composition of compound feeds, animals are fed such fodder, which is difficult to apply separately. For example, fodder animal fats, molasses, table salt, vitamins, salts of trace elements, etc.

The use of compound feeds, especially in granulated form or in the form of grits, excludes selective picking of individual components of the issued portion by animals and poultry [5].

Duck breeding is one of the priority directions for the development of poultry farming in Ukraine. This is an important source of poultry meat, especially in conditions of intensive production.

Purpose and objectives of the analysis

The purpose of the study was to substantiate the feasibility of production of feed for ducks, marketing research and analysis of the feed market for ducks.

Results and its discussion

In January-September 2022, Ukraine exported 301,100 tons of meat and edible poultry offal, which is 9.5% less compared to the same period last year (data from the State Customs Service). In monetary terms, exports for the three quarters of this year amounted to \$659.4 million. This is 30.4% more than in the same period of 2021.

The main buyers of domestic meat and edible poultry offal in the nine months of 2022 were the Netherlands (30.7%), Saudi Arabia (27.9%) and Slovakia (6.7%) [6].

When increasing the production of poultry products in conditions of improving the welfare of the population and increasing the number of citizens with a relatively high purchasing power, the expansion of the range of products, the improvement of its quality, up to the point of obtaining the so-called functional food products with specified properties regarding the content of nutrients and biologically active substances, becomes of great importance [7]. The investment attractiveness of the poultry business, the construction of modern large poul-

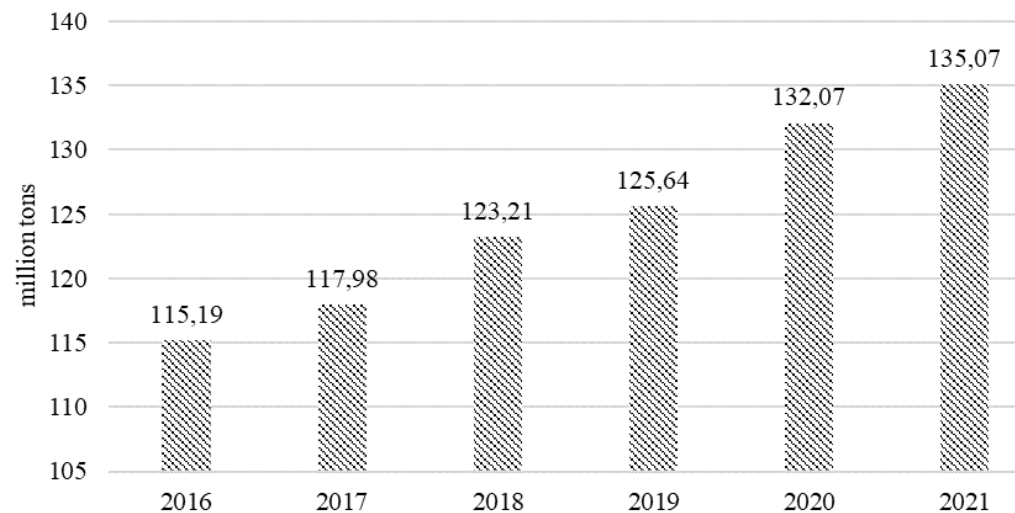


Fig. 1 - Production of poultry meat in the world

try farms and the creation of powerful vertically integrated companies are due to the speed of return on capital investments and the high profitability of the industry.

The volume of poultry meat production in the world is constantly increasing, as can be seen from fig. 1.

In order to determine the position of Ukraine on the world market, we summarized the rating of 45 countries by the level of consumption and production of poultry meat in 2021 (according to the analytical agency Index Mundi) (Fig. 2, Fig. 3).

As can be seen, the traditional leaders in the production and consumption of meat products are the USA, Brazil and China. Ukraine ranks 21st in terms of production (1.175 million tons) and 23rd in consumption (0.89 million tons) of poultry meat.

Analysis of the diagram shows that most countries have a shortage of meat products and can be potential buyers of Ukrainian meat. Ukraine has all the opportunities and prospects for expanding the export of its own products.

The TOP-50 European producers of poultry meat is shown in fig. 4 according to WATT Poultry International (October 2022). As you can see, the third place is occupied by MHP (Ukraine) with an annual volume poultry production of 492 million heads. This is a significant achievement of Ukrainian manufacturers [8].

The Ukrainian chicken market is monopolized by large industrial enterprises (Fig. 5). It is very difficult to compete with such titans. Therefore, there is an opportunity to produce niche types of meat products, namely duck products.

Duck farming is one of the modern dynamic areas of poultry farming and a competitive type of agribusiness, as evidenced by its dynamic development. The perspective and dynamism of this poultry farming area is determined by the high fertility and precociousness of poultry [9].

Duck meat markets are not monopolized by large industrial players, which makes it possible to diversify business and avoid excessive competitive pressure. Export opportunities of niche meat producers to EU countries are significantly inferior in terms of volumes to traditional chicken meat, but this market is distinguished



by its ability to pay.

The profitability of growing one duck exceeds 50%, and depends on the number of livestock.

Raising ducks has certain advantages and disadvantages.

Advantages:

- ✓ ducks are one of the unpretentious breeds

of poultry - the care and feeding procedure is very simple;

- ✓ in the warm season, the birds themselves find food in the natural environment;

- ✓ they reproduce well - one individual brings more than 300 eggs every year. If you consider that their fertilization rate and survival of chicks are from 70%,

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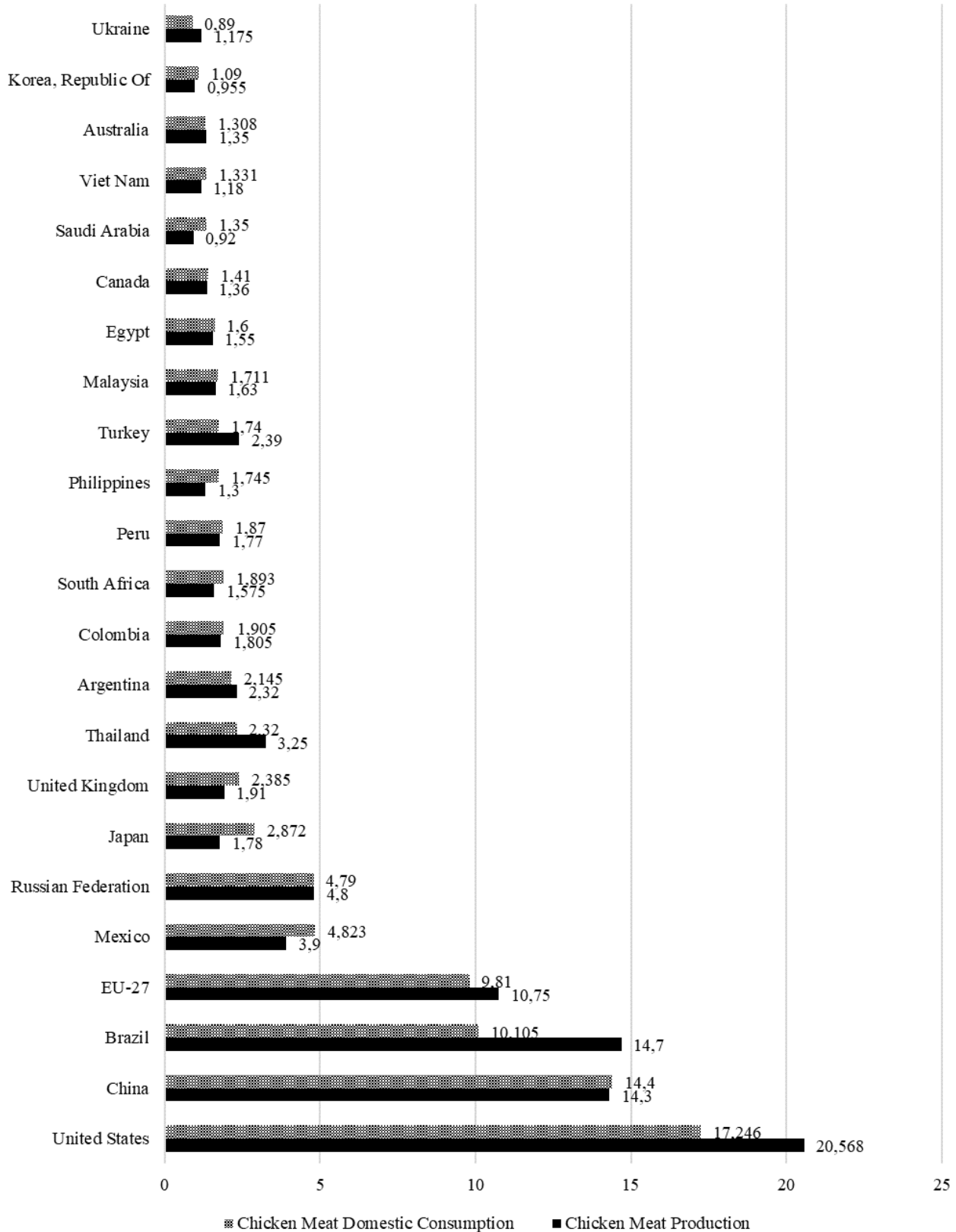


Fig. 2 - Ranking of the world countries by the level of consumption and production of poultry meat in 2021, million tons

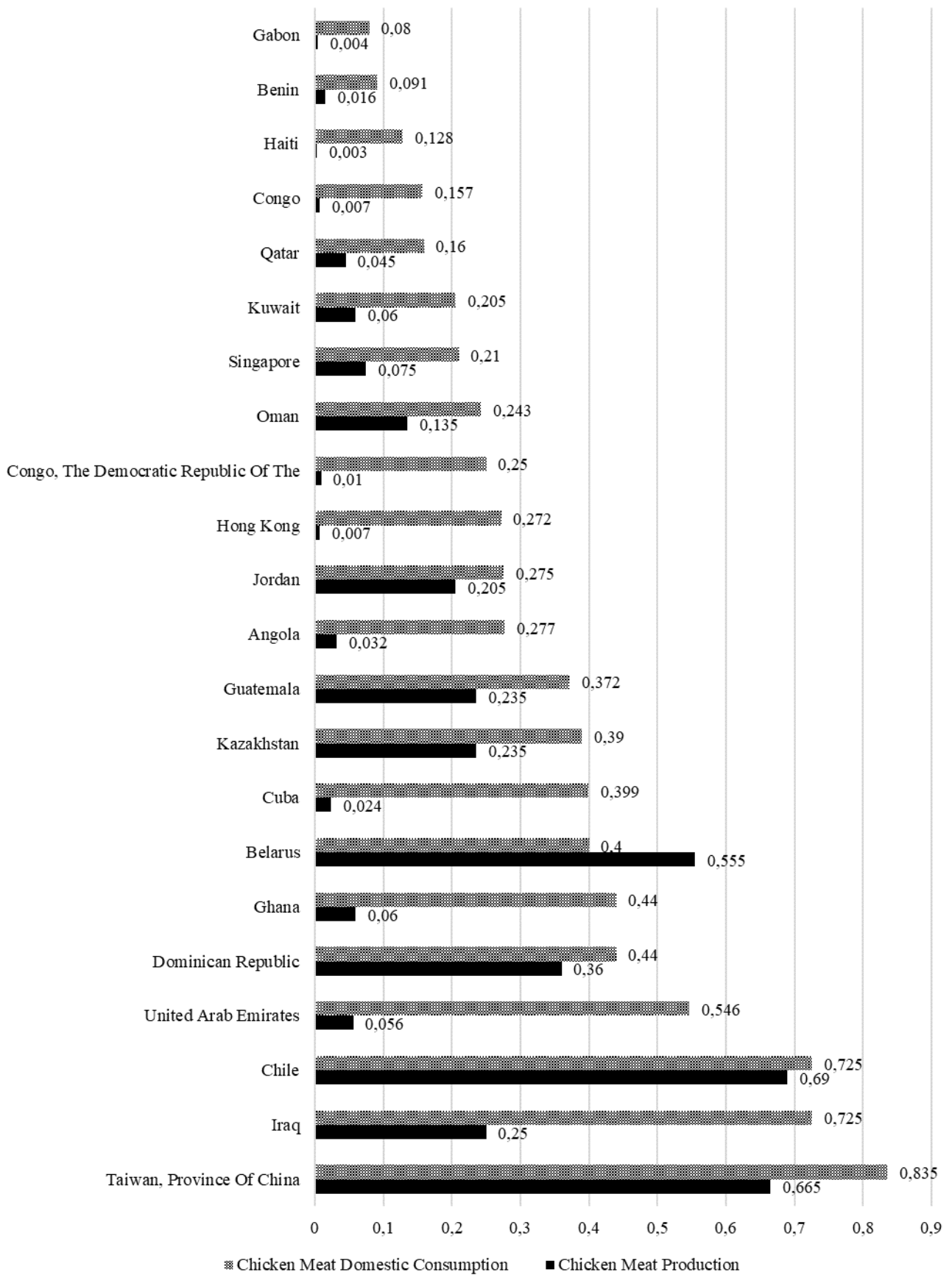


Fig. 3 – Ranking of the world countries by the level of consumption and production of poultry meat in 2021, million tons



EUROPE BROILER PRODUCERS



Head slaughtered annually (broilers, millions)	Company	Country	BROILERS	TURKEYS	DUCKS	TABLE EGGS	Full profile
578.5	LDC	France	●	●	●	●	bit.ly/2MJBtjm
520.0	2 Sisters Food Group	United Kingdom	●	●			bit.ly/2w0B0iV
492.0	MHP (Myronivsky Hliboproduct)	Ukraine	●				bit.ly/2TtZ3DI
468.0	Plukon Food Group	Netherlands	●	●			bit.ly/2MFZurg
27.2	Grupo VMR	Spain	●				bit.ly/3hkGflw
350.0	Gruppo Veronesi	Italy	●	●		●	bit.ly/2SJDizN
350.0	PHW Group	Germany	●	●	●		bit.ly/2vQFA4
346.8	Resource Agribusiness Group	Russia	●				bit.ly/2MKqxlz
322.4	Cherkizovo Group	Russia	●	●		●	bit.ly/2vQyEu
312.0	Moy Park Ltd.	United Kingdom	●	●			bit.ly/2vQaGc
250.0	Amadori	Italy	●	●		●	bit.ly/2MFEi4P
234.0	Avara	United Kingdom	●	●	●		bit.ly/2P81UkU
191.0	Cedrob	Poland	●		●		bit.ly/2w0BxRZ
190.0	Rothkötter-Unternehmensgruppe	Germany	●				bit.ly/2vQa9a
185.1	Priorskolye	Russia	●	●		●	bit.ly/2nXO9aJ
177.5	Scandi Standard	Sweden	●			●	bit.ly/2MqSAqH
150.6	AgroKomplex	Russia	●		●	●	bit.ly/2Sbt5s
104.0	Akashkevskaya	Russia	●			●	bit.ly/2SHUbul
150.0	Sprehe Gruppe	Germany	●	●			bit.ly/2WXYh hv
150.0	Animex	Poland	●	●			bit.ly/2SHUiWN
144.0	Cargill Meats Europe	United Kingdom	●			●	bit.ly/2MFFtMF
130.0	Terrena	France	●	●	●	●	bit.ly/2MrtjNb
115.0	Galliance	France	●	●	●		bit.ly/2MCuvNO
130.0	Eureden	France	●	●	●	●	bit.ly/2MxMwMr
122.4	Koka	Croatia	●	●			bit.ly/3wl1jgi
117.0	Bezrk-Belgrankorm	Russia	●		●		bit.ly/2weW1ps
114.0	Chesterfield Poultry	United Kingdom	●				bit.ly/32NMaHx
110.0	Severnaya	Russia	●				bit.ly/2vZl7Jx

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Fig. 4 - TOP-50 European producers of poultry meat (WATT Poultry International, October 2022) [8]

breeding ducks can be called a profitable business;

- ✓ there are several channels of earning profit - eggs, meat, down, feathers, manure as fertilizer;
- ✓ low morbidity of ducks. The mortality of the birds flock is a rare phenomenon;
- ✓ the demand for duck meat and eggs is not tied to the season.

Disadvantages:

- ✓ ducks are voracious;
- ✓ they need a large area for walking;

- ✓ the presence of a reservoir is mandatory;
- ✓ with improper nutrition or maintenance, the palatability of meat deteriorates, the demand for the product decreases [10].

Ukraine is one of the largest producers of duck meat in Europe. On a global scale, the duck market is 5% of the chicken market. The low level of duck meat production in the world (except Asia) is explained by the seasonality of consumption. Duck meat is in the greatest demand for New Year's holidays. The priority task of the

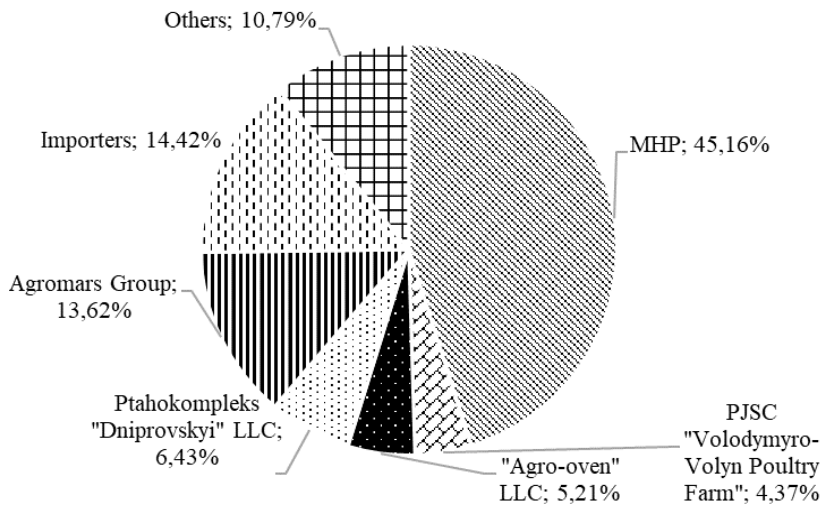


Fig. 5 – The main industrial producers of poultry products in Ukraine

development of duck farming in Ukraine is the protection of the domestic market and the development of the export of products to world markets.

Today, approximately 0.7 kg of duck meat is consumed per inhabitant in Ukraine. This level means that one average family can taste duck once a year. At the same time, the decrease in duck meat production in Ukraine has been going on for at least 25 years. Only compared to 2000, its production decreased by 2.1 times.

The selling price of duck meat is 20-30% higher than that of broiler meat. Given the low purchasing power of the majority of the population, this factor also had a significant impact on the decrease in duck meat consumption in Ukraine. About 90% of duck meat is produced on homestead farms. Existing duck enterprises are mainly focused on meeting the needs of the population in daily young birds. At the same time, this meat is consumed the most in Hungary (3.6 kg per person) and France (3.4 kg per person). These countries rank second and third, respectively, in terms of consumption of duck meat in the world after Malaysia, which leads the list. Southeast Asian countries dominate the production and consumption of dark duck meat, 80% of the world volume. In China, duck meat is preferred as a healthy food product. In Chinese supermarkets, ducks are cheaper than broilers, although their cost is on average 20% higher. This situation is unique for the world market. In Asia, North America and some regions of Europe, it has already become a tradition to include exquisite duck dishes in the menu of expensive restaurants [11, 12, 13].

The global market for duck meat will experience moderate growth in the next 7 years due to the increase in demand for this type of poultry meat in Asian countries. Analysts expect an increase in the market volume to 8 million tons by the end of 2025,

as the projected growth will be +1.6% per year [14]. According to 2021 data, the main exporters of duck meat in the world were Hungary, China, and Poland, and the main importers were Germany, Hong Kong, and France.

Industrial production of duck meat in Ukraine should focus on export to Asian and European countries, where this product is in greater demand than at home.

In fig. 6 the dynamics of changes in the duck population by category of farms (according to the State Statistics Service of Ukraine) is presented. In the first years of Ukraine's independence, there was a decline in agricultural production, duck breeding is no exception. Their population decreased by analogy with

other farm animals. But already at the beginning of 2000, the rapid development of poultry farming began, which is explained by the presence of stable foreign markets for the sale of poultry meat and high profitability. Starting from 2020, the number of ducks in all Ukrainian enterprises began to decrease due to the coronavirus pandemic, logistical complications, and from 2022 - due to a full-scale war in Ukraine. In our country, duck breeding is mainly done by households, and industrial production is not sufficiently developed. The limited demand for fatty and high-calorie duck meat and the absence of poultry slaughtering enterprises discourages potential poultry entrepreneurs.

It is possible to single out several main stages of the transition of the industry to an industrial production method in the history of the domestic duck farming development. It is associated with the development and practical assimilation of following technological methods:

- ✓ breeding and maintenance of ducks without ponds;

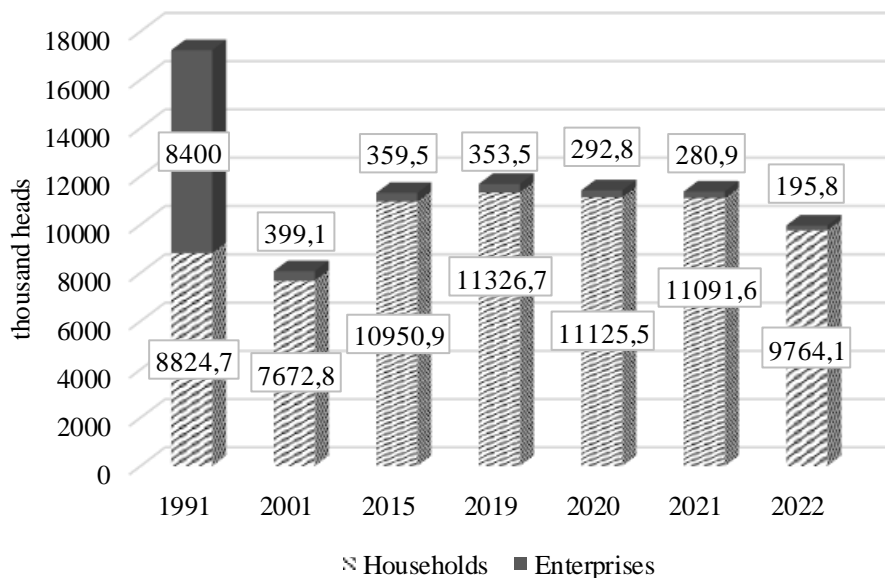


Fig. 6 – Dynamics of changes in the duck population by category of farms (according to the State Statistics Service of Ukraine)



- ✓ multiple stocking of the parent flock of ducks;
- ✓ feeding ducks with dry complete feeds;
- ✓ rearing ducklings on a mesh floor and in cage batteries.

Industrial means of production made it possible to turn duck farming into one of the most effective branches of poultry farming. At the same time, it is possible to successfully combine year-round production with seasonal production in duck farming [3].

With proper organization the business of raising ducks is economically feasible and practically waste-free. The main products of production are meat, eggs, down and feathers, droppings and duck liver.

The main product of industrial duck farming is meat. It has high taste and dietary properties. There is a false claim that duck meat is a source of cholesterol due to its high fat content. However, it has a high level of digestibility and its use contributes to better functioning of the gastrointestinal tract. Duck meat, in addition to fatty acids, contains a large number of various vitamins and minerals: vitamins A, E, K, all B vitamins. Although it is difficult to get their daily allowance only from duck meat, together with other products, the composition of the duck is quite capable of providing the body with many substances necessary for life. As numerous scientific studies show, regular consumption of duck meat contributes to the prevention of atherosclerosis, varicose veins, heart diseases, also strengthens vision, improves memory and reaction, improves the condition of nails and hair, and increases hemoglobin. In the modern conditions of the war in Ukraine, the use of duck meat is becoming more relevant for suppressing stress and depression.

Duck eggs were not widely distributed among the population due to their specific taste and smell, as well as the possibility of contamination with salmonella and other pathogenic bacteria through the surface of the egg. They are mainly used in bakeries, cosmetology and stored for incubation.

Duck down and feathers make up less than 5% of the economic value of the bird. They are used for the manufacture of pillows, blankets, clothes and are characterized by high thermal insulation properties and a long

period of effective operation. However, duck feathers are valued less than goose feathers because of their stiffness, elasticity and the ability to clump.

Duck droppings can be used as a valuable organic fertilizer, which is not inferior to mineral fertilizers in terms of effectiveness. In addition, the technology of biogas production from bird droppings has recently become widespread.

Duck liver is a delicate product with a unique chemical composition and valuable biological and medicinal properties. The world production leaders are France, Hungary, and Belgium. The weight of the liver is on average 300-400 g.

According to world practice, duck breeding can be a profitable business in two options. The first is the creation of a small (mainly seasonal) farm with minimal investment in capital facilities, where the poultry can feed on pasture. The second is the construction of a modern complex for several hundred thousand or millions of heads, where cost reduction is achieved due to large volumes and waste-free production, when everything, including droppings and feathers, becomes a commodity [13].

Conclusions

Based on marketing research, it has been proven that a third of consumers in the world prefer poultry meat. The investment attractiveness of the poultry business in Ukraine due to the quick payback of capital investments and the high profitability of the industry is justified.

The dynamics of poultry meat production in the world and a generalized rating of 45 countries by the level of consumption and production of poultry meat in 2021 were analyzed. It has been proven that most countries have a shortage of meat products and can be potential buyers of Ukrainian meat.

The expediency of meat products diversification due to the production of duck products, which are in demand in Asian countries and can be exported, is justified. The business of raising ducks is almost waste-free with the production of eggs, meat, down, feathers, droppings and duck liver.

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АНАЛІЗ РИНКУ М'ЯСА ПТИЦІ ТА ОБГРУНТУВАННЯ РОЗШИРЕННЯ ЙОГО АСОРТИМЕНТУ

Анотація

На основі маркетингових досліджень доведено, що третина споживачів у світі віддають перевагу м'ясу птиці. Встановлено, що інвестиційна привабливість птахівничого бізнесу, будівництво сучасних великих птахофабрик і створення потужних вертикально інтегрованих компаній зумовлені швидкістю повернення капітальних вкладень і високою прибутковістю галузі. Для визначення позиції України на світовому ринку було узагальнено рейтинг 45 країн за рівнем споживання та виробництва м'яса птиці у 2021 році. Традиційними лідерами у виробництві та споживанні м'ясної продукції є США, Бразилія та Китай. Україна займає 21 місце за виробництвом і 23 місце за споживанням м'яса птиці. Більшість країн мають дефіцит м'ясної продукції і можуть бути потенційними покупцями українського м'яса. Україна має всі можливості та перспективи для розширення експорту власної продукції. Обгрунтовано, що качківництво є одним із сучасних динамічних напрямків птахівництва та конкурентоспроможним видом агробізнесу, про що свідчить його динамічний розвиток. Перспективність і динамічність цього напрямку птахівництва визначається високою плодючістю та швидкістю птиці. Ринки качинового м'яса не монополізовані великими промисловими гравцями, що дозволяє диверсифікувати бізнес і уникнути надмірного конкурентного тиску. Експортні можливості нішевих виробників м'яса до країн ЄС значно поступаються за обсягами традиційній курятині, але цей ринок вирізняється платоспроможністю. Україна є одним з найбільших виробників качинового м'яса в Європі. У світовому масштабі ринок качки становить 5% ринку курятини. Низький рівень виробництва качинового м'яса в світі (крім Азії) пояснюється сезонністю споживання. Пріоритетним завданням розвитку качківництва в Україні є захист внутрішнього ринку та розвиток експорту продукції на світові ринки. Промислове виробництво качинового м'яса в Україні слід орієнтувати на експорт до країн Азії та Європи, де цей продукт користується більшим попитом, ніж на батьківщині. Встановлено, що при належній організації бізнес з вирощування качок є економічно доцільним і практично безвідходним. Основною продукцією виробництва є м'ясо, яйця, пух і пір'я, послід і качина печінка.

Ключові слова: качки, повнораціонні комбікорми, м'ясо птиці, промислові виробники, світове споживання та виробництво, нішеві типи м'ясної продукції.

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