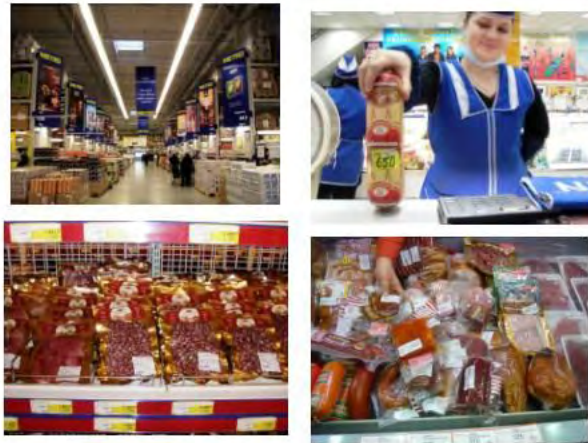


8. Material of Food Processing Seminar (Regional Brand Building)



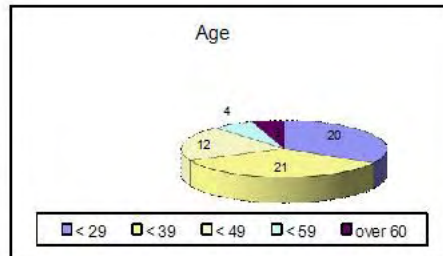
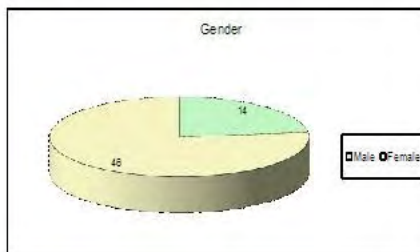
1. Study of image of food products made in Petropavlovsk among the citizens of Astana city



3

Results of questionnaire in Astana city

- Date : 16/12/2009
- Location : Astana city
(Railway station, Shopping center,
Residential area)
- Participants : Total 60



4

Which food products made in North-Kazakhstan oblast do you prefer?

No	Item	Amount	Answers percentage
1	Cereals	14	23%
2	Flour	25	41%
3	Pasta	39	65%
4	Confectionary	8	13%
5	Milk	39	65%
6	Butter	45	75%
7	Yogurt	11	18%
8	Cheese	20	33%
9	Meat	13	21%
10	Sausage	36	60%
11	Other meat products	1	1,6%
12	Drinks	1	1,6%
Total		60	100%

5

Do you buy the agricultural products made in North-Kazakhstan oblast?

No	Parameter	Amount	Remarks						
			Milk	Butter	Sour cream	Meat	Sausage	Pasta	Other
1	Usually I buy.	43	14	10	1	4	1	17	0
2	I've ever bought	13	4	3	0	0	2	0	1
3	I've never bought	3							
Total		59	18	13	1	4	3	17	1

6



Results

- (1) Citizens of Astana city prefer **MILK, BUTTER, PASTA AND SAUSAGE** made in North-Kazakhstan oblast.
- (2) Citizens of Astana city usually buy **MILK, BUTTER AND MACARONI** made in North-Kazakhstan oblast. .
- (3) Citizens of Astana city consider that the products made in North-Kazakhstan oblast are **TASTY, FRESH AND SAFE**.

This is image of NKO

8

2. Example of regional brand building in Japan



9

① What does “Tokachi brand” means ?

The concept of Tokachi brand is:

«Confidence, safety and excellent taste»

Standard	Besides the requirement that 100% of raw materials are produced in Tokachi (confidence), there is comprehensive quality and sanitary conditions control (safety) and organoleptic analysis (taste).
Certification period	3 years (yearly inspection)
Participants of the brand	«Examination routine of Tokachi brand» Selection of companies approved for the production. Development of standards for each category of food products and implementation of quality control.



Total area of Tokachi is 10827,47 км².
 «Tokachi, Kingdom of dairy farms» is really focus of natural delicious tastes.

10

Tokachi brand image «Double Star»



Presently there are 11 cheese-making companies (64 assortment items), 16 bakeries produce 161 different items under Tokachi brand.



Tokachi cheese-making companies placement

11

② Regional brand “Miyazaki Brand”

■ Miyazaki Prefecture unifies the name of regional specialty products in “area name & products name” and promotes the products sales providing brochures in exhibitions, department stores and supermarkets (refers to the pictures on the right). Furthermore, packagings with the prefecture governor’s portrait tell consumers that the products are recommended by the prefecture governor himself.



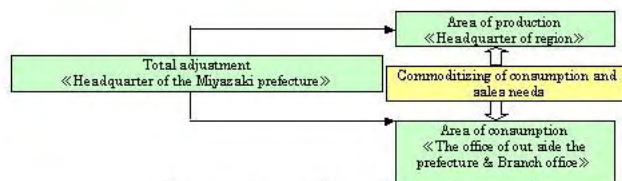
Miyazaki Mango Pudding with the prefecture governor's portrait.



The Miyazaki Brand Book

An example of the government initiative regional brand “Miyazaki Brand”

“Miyazaki Brand” is an example of the government initiative regional brand that is mainly formed by “Miyazaki Brand Promotion Headquarter”, its head office is the Ministry of Agriculture, Policy and Fisheries, Division of Agriculture, Policy and Plan, Miyazaki Prefecture. Honored chief of the headquarters “Miyazaki Brand Promotion Headquarter” is assigned by prefecture governor and the characteristics of business type that the Miyazaki prefecture governor himself conducting business is limelighted in the nation wide level.

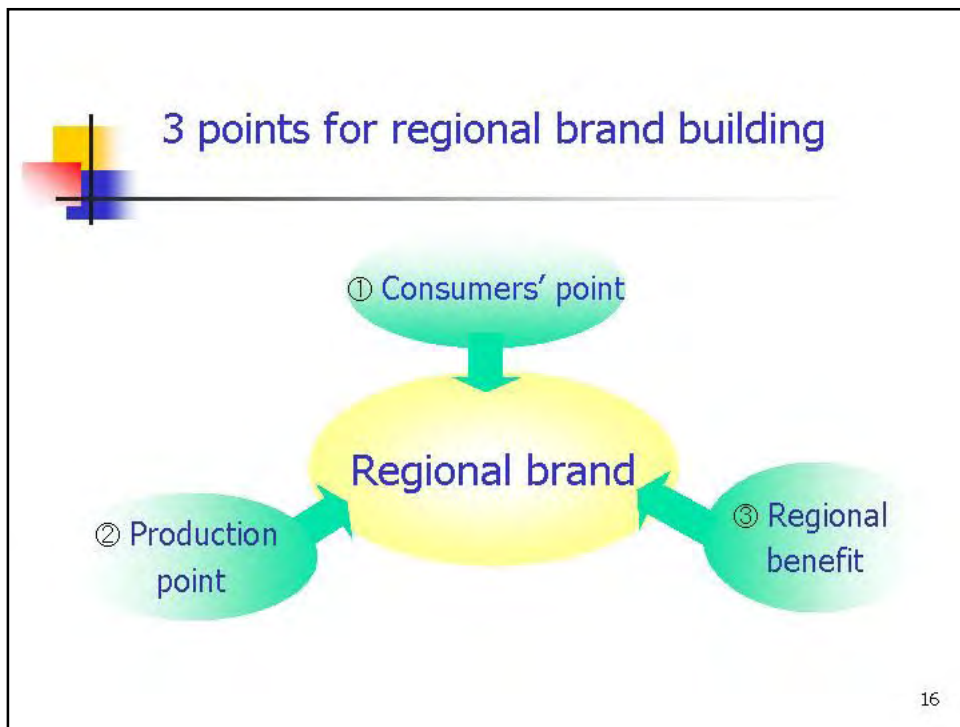


The structure of Miyazaki Brand promotion
Reference: Miyazaki Brand Promotion Headquater
<http://www.miyazakibrand.jp/miyazakibrand/outline/index.html>

Miyazaki Brand Recognition Institution

“Miyazaki Brand” captures the consumption and distribution needs precisely. And the “Miyazaki Brand” is well known in safety and reassurance. In addition to the safety and reassurance, agricultural products and commodities’ high standard in the appearance including shape and colour, taste (sweetness and sourness), freshness, specification, trend and cultivation methods are highly recognized at the national level. The producers and products areas are highly recognized in their products’ brand name and that encourages producers to hold high manufacturing sprits (Monodukuri) and that makes the products brand well known in safety and satisfaction to markets and consumers.

Main Body	Miyazaki Brand Promotion Headquater (Miyazaki Prefecture)
Concepts of the brand	Creation of special commodities (Promoting the commodity brand recognition institution) Creation of the reliable areas of production (Implementation of on time, given quantity and quality system) Stabilized trading (Expansion in commodity brand strategic sales action plan)
Object	livestock, vegetables, fruits, flowers
Standard	Each commodities holds the standard in tastes, freshness and safety
Recognition effective period	Not specifically limited



① Consumers' point

Consumers' confidence and appreciation rise

↓

Open information about the producer of food products

- production technology
- processing methods
- cattle raising system

17

Example of consumers' confidence and appreciation rise



Milk package with producers' picture

Information about the certain farmers

18

Example of consumers' confidence and appreciation rise

Creation of informational web-site in internet

常広市産 大切に育てた「放牧豚」で
 造る逸品ハム&ソーセージ

ローズハムスライス
 100g 616円

ウィナーソーセージ
 5本入り 544円

ランチョ・エールファーム
 代表 平林 英明さん

自然に近い環境の下で、ホエーや木の
 実を食べ、ストレス
 を与えないよう育て
 た
 放牧豚の味わいをお
 試しください。

Brief information about the producer with the name of the company, concise description of the product, its price, picture of the producer and merits of the product.

19

② Production

Business type «Business expansion at the expense of increase of production volume»

① cheap labor power + ② cheap land = ③ cheap goods



Business type «Production of goods with high added value»

production of goods with high added value

20

Example of added value rise



Premium milk (milk taken from a single cow) is produced only here. From the herd of elite cows which were bred with accuracy and patience the cow with the best characteristics and choice milk content is selected.



It never mixes with milk taken from other cows. This type of milk is called non-blend.

■ 200ml 4.2US\$ (624kzt.)

Herd-book



MIZAWA farm

21

Example of added value rise

Whey utilization for hog fattening in Hokkaido

While using the meat obtained with this technology Nihon Ham company produced special range of products.



For the purposes of introduction of new technology in hog fattening this company founded its own trial farm, that's why all the products are made from own raw materials.

*いづれも販路は、全国の量販店、食料品店

22

③ Benefits for the regional population and economy

- Promotion of development of regional economy using regional brand

Examples. Activities, festivals, antenna shops in other regions

23

Antenna shop - “Hokkaido Dosanko Plaza” (Tokyo)



The management of this shop is executed by Sapporo Marui Imai company. Hokkaido island authorities promote the activities of this shop.

24

Examples of promotion of regional economy

Open farming

Tourist visitation of ordinary farms



Sausage making



Do-it-yourself milking



Butter production



Meat gift set



Dairy gift set

25

North-Kazakhstan regional brand building

Which brand might be created in North-Kazakhstan oblast?

*First step is always hard to make.
But once it's time to do it.*



26

Our proposals

- 1) Organization of the working group for brand building
- 2) Selection of brand concept
Example: Confidence, Safety and Taste
- 3) Creation of informational web-site in internet
Example: to the right
- 4) Introduction of the common standard for the means of preservation of brand's quality
- 5) Participation of the brand-building companies in exhibitions

産地町産

生乳本来のコクと香りが
引き立つよう調味を採入れた
ヨーグルト
カンツリーホーム風景
清水 智久さん



草原のヨーグルト
「でーでーぼっぼ」
250g 320円
500g 480円



自家牧場でその朝搾った
牛乳を使用。ノンホモタイ
プなので上部にクリームの
層ができるのが特徴で
す。

27

Thank you for your attention!



28

Северо-Казхстанская Область

Глава Новости Поддержка

ТОО МОЛСОЮЗ

История компании



История Гитропальной молочной фермы начинается с 1928 года – с начала строительства завода. Основной задачей являлась механизация производства продукции на 900-000 голов.

В последующие годы предприятие модернизировало, реконструировало технологические подразделения.

Основное направление предприятия получило в 1988 году после создания на его базе объединения колхозной Гитропальной фермы.

До 1992 года основной деятельностью предприятия являлось хранение и сбыт молочной продукции. Интенсивное развитие молочной промышленности области, возросший спрос в Казахстане и прилегающих странах привели в 1992 году на предприятие вышеназванного объединения к производству сыра «Алматы». Были открыты первые сырные цеха.

В январе 1996 года началось производство сыра и творога в соответствии с требованиями стандарта.

В 1999 году в связи с изменением конъюнктуры рынка, и целью расширения ассортимента продукции, на предприятии был организован участок по производству сыра.

В 2003 году начата реконструкция производственного участка по производству сыра твердого с целью расширения его ассортимента, увеличения объема производства, улучшения структуры и качества современной продукции.

В 2007 году начата реконструкция цеха по производству колбасной продукции. Это позволило значительно расширить для предприятия рынок с производством продукции.

Успешно реализованы программы, разработанные международными программами, что позволило увеличить мощность предприятия в 10 раз в год.

Сегодня ТОО «Молочный союз» – современное высокотехнологичное предприятие, оснащенное новейшим импортным оборудованием, высококвалифицированными кадрами, со своим традиционным и высочайшим качеством продукции.

Директор: Кудаман Азамат Константинович
Руководитель: Барлысхан Галина Дмитриевна
Производительность: 7000 тонн в год

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Продукция компании



Продукция компании

Молоко «Лепестки»

Молоко не должно быть кислым. Только качественное. Вкус и запах не имеют значения. Только качественное молоко. Только качественное молоко. Только качественное молоко.




НАГРАДЫ

«Examples of Leaflet for the Trade Show»

"Общее исследование развития кластеров в пищевой промышленности СКО в рамках совместного проекта Акимата СКО и Японского Агентства Международного Сотрудничества"

Северо-Казakhstanская Область

В краю берёз и золотых полей
Добрым вкусом дышит у людей
Болят и цвет природы дачистам -
Нам Северный, нарядный, Климатный!
Генерал Родрик



«Исторически сложилось так, что в Северо-Казakhstanской Области производят лучшие продукты питания. Климатические условия и чистота окружающей среды позволяют получить качественное сырье, поэтому наши компании уверены в безопасности своей продукции. Мы производим для вас продукты питания вводящая душевное тепло и любовь!»

Рекомендации из Хокайдо, Япония

«Наша исследовательская команда из Японии проработала со специалистами в Северо-Казakhstanской Области более чем полгода. Теперь мы знаем, что здешний климат благоприятен для выработки отличного сыра, и компания прилагает все усилия, чтобы производить продукцию высокого качества. Мы с радостью рекомендуем вам попробовать эти продукты из Северного Казахстана». Исследовательская Группа Японского Агентства Международного Сотрудничества



Такуми Тогаши

Международная выставка по пищевой промышленности
«InterFood Astana 2010»

ЧП МЕДЕННИКОВ

Идея начать производство колбасных изделий возникла в Германии, после двухлетнего там проживания. Познакомился с молодым хозяином колбасного завода, продолжателем семейной династии этеричным немцем Сидром, многому мы у него научились, как начать производство, на что больше уделить внимание, помоге приобрести оборудование, много мехочей технологий. Дел строился как самостоятельный объект в 1997г с учетом всех санитарно-гигиенических норм для мясоперерабатывающих предприятий.







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ТОО МОЛОСОЗ

До 1992 года основной деятельностью предприятия являлось хранение и сбыт готовой продукции, выработанной переработанной молочной промышленностью области, оказание услуг по фасовке масла и производству сыра плавленого.

В 1992 году на предприятии были введены мощности по производству сыра «Ступини». Были освоены первые мощности по переработке своей личной томной молока в сыр.

В конце 1994 года введены мощности по производству молока и молочнокислых продуктов.

В 1999 году в связи с изменением конъюнктуры рынка, в целях расширения ассортимента продукции, на предприятии была организована линия по производству сыра твердого.

В 2001 году проведена реконструкция созданного участка по производству сыра твердого с целью расширения его ассортимента, увеличения объема производства, сокращение ручного труда, внедрения современных технологий.

В 2007 году проведена реконструкция цеха по производству цельномолочной продукции. Установлены итальянские оборудование для производства молока с продлеваемыми сроками хранения.

Увеличились объемы производства, расширился ассортимент выпускаемой продукции, что позволило увеличить мощности по переработке молока до 90 тонн в сутки.

Сегодня ТОО «Молочный союз» — современное высокотехнологичное предприятие, оснащенное новейшим импортным оборудованием, высококвалифицированными кадрами, со своим традиционным и высокой культурой производства.






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e-mail: mol@rambler.ru

Молочный завод КТП Зенченко и К

Молочный завод был зарегистрирован в феврале 1997 года. Наше предприятие выпускает 41 наименований продукции: масло, сыр, творожные изделия и кисломолочные продукты.

Производительность завода 72 000 тонн в год.

Нашим преимуществом является стабильное высокое качество продукции, так как мы имеем собственную сырьевую базу с плантациям молочным скотом с высокой санитарной культурой. В процессе производства нашей продукции мы не используем химических и ароматизирующих добавок, в перспективе предусмотрено выпускать цельную продукцию с длительными сроками хранения на основе биодобавок.



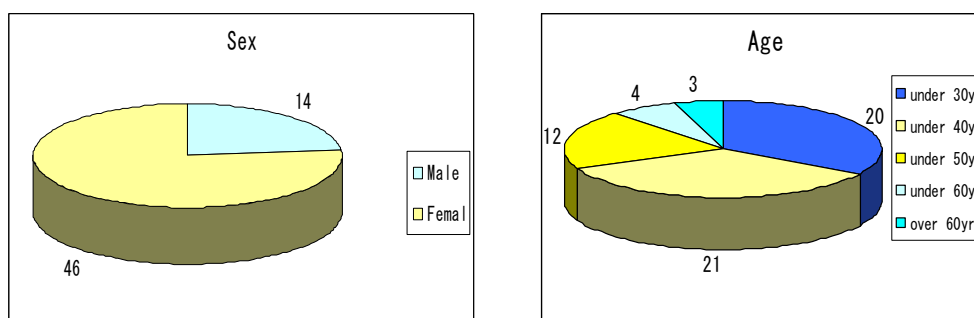



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10. Opinion Poll in Astana

< Opinion Poll regarding the Food Products from North Kazakshtan Oblast >

Not many companies in North Kazakhstan Oblast have experience for the participation in the exhibition or trade show held in other area than North Kazakhstan Oblast. Because of this, many of the companies did not grasp the evaluation of the food products made in North Kazakhstan Oblast from other area. So, through the study, we have done opinion poll asking about North Kazakhstan made food product. On the 16th of December a survey was carried out in Astana city in relation to products from Petropavlovsk. The survey was conducted at the train station, commercial centre and residential area. We were able to receive 60 responses (Male 14, Female 46).



As a result of the survey, the popular agricultural products from North Kazakhstan are pasta, milk, butter and sausage and here dairy products and meat processing products were highly evaluated. The responses received in relation to the impression of agricultural products from North Kazakhstan, is that of good taste, fresh, and safe. On the other hand, a not so favorable response was received in relation to package design, pricing, small amount of products and lack of places where to get those products. Therefore, in Astana, consumer has discriminated the products from North Kazakhstan Oblast from other area's products, so, it has possibility to construct the brand value of North Kazakhsatan food products among Astana.

< Impression of the Food Products from North Kazakhstan Oblast >

	Rank	Answer	%
Popularity of Food Product (M.A)	1	Butter	75%
	2	Milk, Pasta	65%
	3	Sausage	60%
Food Product to buy mostly	1	Pasta	40%
	2	Milk	33%
	3	Butter	23%
Positive Image of NKO Food Product (Highest point: 5.0)	1	Taste	4.5
	2	Security	4.3
	3	Freshness	4.2
Negative Image of NKO Food Product (Highest point: 5.0)	1	Package design, Price	3.0
	2	Variety	3.0
	3	Availability (Shops where to buy are unknown)	3.6

< The Result of Opinion Poll >

Q1 Which is your preference of food product from North Kazakhstan Oblast ?

In Astana, the most preferred food product was butter and followed by milk and pasta as second place, and sausage as third place.

No.	Parameter	Amount	%
1	Cereals	14	23.3
2	Flour	25	41.7
3	Pasta	39	65.0
4	Confectionary	8	13.3
5	Milk	39	65.0
6	Butter	45	75.0
7	Yogurt	11	18.3
8	Cheese	20	33.3
9	Meat	13	21.7
10	Sausage	36	60.0
11	Other meat products	1	1.7
12	Drinks	1	1.7
All		251	

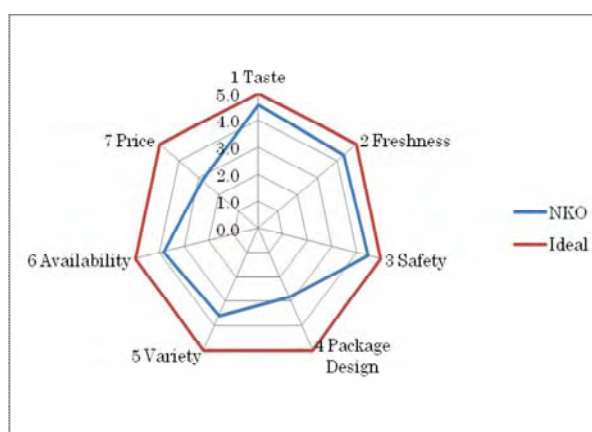
Q2 Frequency of purchase of food product from North Kazakshtan Oblast.

Pasta, Milk, Butter were frequently purchased.

No.	Parameter	Amount	Remarks						
			Milk	Butter	Sourc-m	Meat	Sausage	Pasta	Other
1	Frequently purchase	43	14	10	1	4	1	17	0
2	Purchased before	13	4	3	0	0	2	0	1
3	Never purchase	3							
All		59	18	13	1	4	3	17	1

Q3 Impression of the food products from North Kazakhstan Oblast

Good taste, fresh, and safe are positive impression of NKO's food products. On the other hand, negative impression are received in relation to package design, pricing.



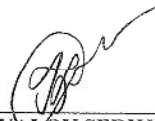
11. Scope of the Work (S/W)

**SCOPE OF WORK
FOR
MASTER PLAN STUDY
ON
CLUSTER DEVELOPMENT
IN
FOOD PROCESSING INDUSTRY
IN
THE NORTH KAZAKHSTAN OBLAST
AGREED UPON BETWEEN
AKIMAT OF NORTH KAZAKHSTAN OBLAST
OF
THE REPUBLIC OF KAZAKHSTAN
AND
JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)**

PETROPAVLOVSK, APRIL 22, 2009



**MR. JURO MASAYOSHI
LEADER
DETAILED PLANNING SURVEY TEAM
JAPAN INTERNATIONAL
COOPERATION AGENCY (JICA)**



**MR. BILYALOV SERIK
AKIM
OF NORTH KAZAKHSTAN OBLAST
OF THE REPUBLIC OF KAZAKHSTAN**

I INTRODUCTION

In response to the request of the Government of the Republic of Kazakhstan (hereinafter referred to as "GOK"), the Government of Japan (hereinafter referred to as "GOJ") has decided to conduct the "Master Plan Study on Development of Cluster Initiatives in the North Kazakhstan Oblast" in accordance with the relevant laws and regulations in force in Japan.

Accordingly, Japan International Cooperation Agency (hereinafter referred to as "JICA"), the official agency responsible for the implementation of the technical cooperation programs of GOJ, will undertake the "Master Plan Study on Development of Cluster Initiatives in the North Kazakhstan Oblast" in close cooperation with the authorities concerned of the GOK.

The present document sets forth the Scope of Work with regard to the "Master Plan Study on Development of Cluster Initiatives in the North Kazakhstan Oblast" and will be valid after notification of approval by JICA Headquarters through Ministry of Economy and Budget Planning to the GOK and Akimat of North Kazakhstan Oblast (hereinafter referred to as "Akimat").

II TITLE OF THE STUDY

The name of the Study changed to "Master Plan Study on Cluster Development in Food Processing Industry in the North Kazakhstan Oblast" (hereinafter referred to as "the Study").

III OBJECTIVES OF THE STUDY

For strengthening the competitiveness of small and medium enterprises (hereinafter referred to as SMEs) in food processing sector which is a promising industrial sector in North Kazakhstan Oblast, the objectives of the Study is to formulate the Master Plan for strengthening SME's competitiveness through cluster promotion approach based on the situation in the North Kazakhstan Oblast, on a basis of value chain analysis.

IV STUDY AREA

The Study area shall cover North Kazakhstan Oblast.

V SCOPE OF THE STUDY

- (1) To research on procurement of raw materials, production, distribution and export systems of food processing industry sector including company diagnosis;
- (2) To clarify the export competitiveness and bottlenecks of food processing industry sector;
- (3) To research on the competition with imported products in the domestic market, clarify the product specifications, quality level, and production cost required for the international market, and suggest effective measures for strengthening each value chain including procurement, production management, quality management, cost management and marketing etc. for enhancing SMEs' competitiveness ;
- (4) To recommend effective cluster promotion strategy including specific measures ;
- (5) To recommend the implementation structure for the specific measures, and to do cost estimation;
- (6) To conduct seminars for awareness-raising and capacity development for related personnel; and



- (7) To formulate the recommendation for strengthening Private-Public Partnership for SME promotion through cluster promotion approach.

VI STUDY SCHEDULE

The Study will be carried out as per attached tentative schedule (Appendix). The Schedule is tentative and subject to be modified when both parties agree upon any necessity that may arise before or during the course of the Study.

VII REPORTS

JICA shall prepare and submit the following reports in English and Russian to GOK and Akimat. In case any doubt arises in interpretation, the English version shall prevail.

1. Inception Report:30 copies (5 copies in English and 25 copies in Russian)
The Inception Report will contain the schedule and methodology of the Cooperation. The report will be submitted at the commencement of the Study in Kazakhstan.
2. Draft Final Report:30 copies (5 copies in English and 25copies in Russian)
Draft Final Report will contain the provisional result of the Study and draft recommendations. The report with Executive Summary will be submitted at the end of the second work period in Japan. Akimat shall submit written comments on the Draft Final Report to JICA within one (1) month after the receipt of the report.
3. Final Report:35 copies (5 copies in English and 30 copies in Russian) and CD-ROM(as PDF version).
Final Report with Executive Summary will be submitted within two (2) months after the receipt of the comments on the Draft Final Report from Akimat.

VIII UNDERTAKING OF THE AKIMAT OF NORTH KAZAKHSTAN OBLAST

1. To facilitate the smooth conduct of the Study, Akimat will follow the law of the Republic of Kazakhstan No.61 dated on June 20, 2005 "Agreement on Technical Cooperation between the Government of Japan and the Government of the Republic of Kazakhstan" and following necessary measures in the course of implementation of the Study shall be undertaken:
 - (1) to assist in case of entering some specific zones in connection with the implementation of the Study, following the existing law of the Republic of Kazakhstan which regulates the procedure for visiting the special regime facilities; and
 - (2) to assist in obtaining permission for the Japanese Study Team to take all data related to the Study out of the Republic of Kazakhstan. In case, when such data contain confidential information, Akimat will follow the existing law of the Republic of Kazakhstan which regulates the procedure for handling over the materials with confidential information to the foreign governments.
2. Akimat shall act as the responsible body to the Japanese Study Team. And Akimat shall act also as a coordinating body in relation with other governmental and non-governmental organizations for the smooth implementation of the Study.

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3. Akimat shall, at its own expense, provide the Japanese Study Team with the following, in cooperation with the other organizations concerned:
- (1) security related information on as well as necessary measures to ensure the safety of the Japanese Study Team;
 - (2) information on as well as support in obtaining medical services;
 - (3) available data and information related to the Study;
 - (4) counterpart personnel ;
 - (5) suitable office space with available office equipment and furniture; and
 - (6) identification card.

IX OTHERS

1. Akimat and JICA shall consult with each other in respect of any matter that may arise from or in connection with the Study.
2. Two (2) sets of originals of the Scope of Work (English and Russian version) are prepared. In case any doubt arises in interpretation, the English text shall prevail.

Appendix

TENTATIVE STUDY SCHEDULE

Month/Year		09/2009	10/2009	11/2009	12/2009	01/2010	02/2010	03/2010	04/2010
Work in Kazakhstan									
Work in Japan		□				□		□	
Report	IC/R	△			DF/R	△			△ F/R

Report IC/R :Inception Report
 DF/R :Draft Final Report
 F/R :Final Report

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