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РЕСПУБЛИКИ КАЗАХСТАН

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АГРАРНЫЙ УНИВЕРСИТЕТ

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M. I. Sigarev, M. T. Kantureyev

Kazakh RI of Agro-Industrial Complex Economy and Rural Development, Kazakhstan.

E-mail: i.taipova@mail.ru, m_rantureyev@mail.ru

**EXPORT-ORIENTED PRODUCTS AND FOOD MARKET
IN KAZAKHSTAN**

Abstract. Agricultural production provides the population with food and raw materials, generates the profitability of the country's economy. Measures and mechanisms aimed to support export of agricultural and food products are being improved based on the international practice, which requires effective State regulation of export-oriented agricultural products market in rural regions in the context of Kazakhstan's integration into the world economy. Exports in developed countries are subject to WTO rules and regulations, taking into account export subsidies of the State-owned trading enterprises, loans to exports, insurance, including financial and institutional tools. The financial mechanism consists of lending to exports and imports, reimbursement of part of cost of loan interest payment, export insurance, stimulating export production (tax incentives, financial infrastructure development, stimulating foreign direct investment, providing grants, private investments, subsidizing research works). Analysis shows that the growth rate of food production does not correspond to the volume of consumption and income of the population, which is compensated by imports of goods that were previously produced in Kazakhstan: butter and vegetable oil, cheese, sausages, sugar, fruits and vegetables and canned meat.

Keywords: agricultural sector, market, export, food products, investments, infrastructure, loans, taxes, incomes.

Introduction. Openness of agricultural economy in combination with balanced trade policy allows to ensure high production rates, including export-oriented agricultural and food products. In this regard, the development of agri-food market (production, correlation between supply and demand, export-import directions) is of particular importance for the State's ability to sell export products.

The Republic of Kazakhstan has a considerable potential for the development of agricultural production and increase of the export of not only main traditional commodity (grain and grain processed products), but also other agricultural products (meat, oilseeds, vegetables, etc.), incl. environmentally friendly products. All this requires improvement of the State regulation of the export-oriented product market in rural regions in the context of Kazakhstan's active integration into the world economy, State regulation of which should be based on the mechanisms of foreign trade in food and raw materials. The production of high-quality competitive products should meet international quality standards.

In Kazakhstan, agricultural sector needs a radical transformation, which is connected with the solution of the following problems: unsatisfactory quality of agricultural products which don't meet the world standards; high share of depreciated material-technical basis, shortage of working capital; lack of an effective mechanism of mutual relations between enterprises of three spheres of agri-industrial complex.

The possibilities of agricultural exports are used insufficiently due to the obstacles to exporting goods, low level of labor productivity, inefficient set of measures to implement the country's export potential.

Methods. Scientific methods of research on this issue should be based on the requirements of objective and systemic factor analysis of the status of agricultural enterprises. It is necessary to use financial methods of stimulating and supporting exports, in particular subsidizing loans and insurance of export risks. Financial factors include direct subsidies, government guarantees for exporters to receive financial

resources, tax incentives, tax refunds on exports of goods; price methods for stabilizing prices of consumer food products and agricultural raw materials market; methodology of calculating supply and demand forecasts on main types of export-oriented agricultural products.

The use of the proposed methodologies will contribute to the development of the effective measures on the formation of the effective State and interstate relations, increased volume of production of products and food products on the domestic common agricultural market, and simultaneous access to the international level.

One of the specific features of agricultural sphere is the seasonal character of agricultural production and harsh natural and climatic conditions to which the efficiency of production is directly related, which affects the efficiency indicators (return on investment) of agricultural enterprises and a reliable assessment of the effective public support.

Such approach in the formation of public support in production of export-oriented agricultural and food products based on the study of the world experience requires systematization of agricultural entities in production of goods in rural regions of the republic and on its basis the development of proposals on the effective State regulation in Kazakhstan.

Results. Kazakhstan takes the ninth place in the world in terms of area, and as for arable land per capita - the second place, and is among the top 15 leading countries- wheat producers, which provide 90% of total production. In the structure of food production, the share of grain processing industry is 22.3%, dairy - 13.7%, bakery - 15%, meat processing - 13.6%, oil and fat - 7.9%, fruit and vegetable - 7.6% and other industries - 16.9%.

Diversification of arable areas is as follows: in 2017 wheat crops have reduced by 3.7% as compared to 2016, barley crops increased by 9.1%, oats - by 5.3%, legumes - 2.6 times, oilseed crops - by 21.9%, sugar beets - 1.5 times, cotton - by 22.9%, forage crops decreased by 6% [1].

The volume of gross agricultural production increased by 11.3%, including crop production - by 11.3% and livestock production - by 11.5%. Production of food products increased - by 4.1%, the volume of investments - by 31.5% [2,3]. Flour production increased by 3.7%, vegetable oil by 15.1%, fermented milk products by 1.4%, cereals by 22.6%, cheese and cottage cheese by 4%, canned vegetables by 27.9%, meat and canned meat - by 12.2%, sausages - decreased by 3.1%.

In rural areas of Kazakhstan, the population number is 7643 thous. people, the share is 42.6% in the total volume, the share of employed - 18%, the share of agriculture - 4.8%. 15,770 legal entities (agricultural enterprises) are manufacturers of agricultural products, 194,8 thous. -small farms and 1,645,7 thous. households.

In 2017 export of agricultural products and processed products increased by 12.5% compared to 2016 (from 2124 mln. USD to 2388 mln. USD), including processed products by 10.7% (from 974 mln. USD to 1,077 mln. USD) [4].

The main exports volume is as follows: wheat (27.7%), flour (19.7%), oilseeds (10.5%), barley (5.8%), vegetable oil (3.9%), cotton fiber (3, 8%), leguminous vegetables (2.5%).

Sales markets are Uzbekistan (19.7%), Afghanistan (19.6%), Russia (12%), Tajikistan (9.6%), China (7.5%), Iran (7.1%), Kyrgyzstan (5.3%), Turkey (3.5%), Italy (2.6%), Latvia (2.4%) [5].

Imports of agricultural products reached 2,649 mln USD, including beef - 1.9%, cereals and processed products - 15.3%, fruits and berries - 15.7%, oilseeds - 5.3%, milk and dairy products - 10.2%, vegetables - 7.1%, sugar - 7.0%, poultry - 6%, sausages and meat products - 2.6%, fish - 2.5%, fresh, chilled and frozen fish 75%, import exceeds exports by vegetables 9 times, potatoes - 19.4%, fruits and berries - 118 times, poultry - 54 times, milk and dairy products - 19.7 times; exports exceed imports by grain - 53.7 times, oilseeds - 9 times, cotton - 21.5%.

The capacities of sugar factories are loaded by 37.1%, fruit and vegetable processing - by 27%, potatoes by 23%, fish - by 43%, fat and oil enterprises by 50%.

One of the main reasons is the underdevelopment of procurement system and promotion of agricultural products from agricultural producers, including raw materials processing enterprises. Strong involvement of intermediaries in the marketing network almost completely eliminated the interaction between producers and processors of raw materials. Low purchase prices of agricultural products do not stimulate the increased production volumes, which leads to a low share of processing of agricultural raw

materials, insufficient loading of the capacities of processing enterprises and, ultimately, high share of food products imports.

In Kazakhstan, there are 201 grain receiving enterprises, which have a total grain storage capacity of 13.6 mln tons, 382 flour mills with an annual processing capacity of about 8 mln tons of grain and production capacity - 6.1 mln tons of flour.

To meet the needs of livestock farms in the regions there are 69 feed mills with a total capacity of 2.4 mln tons per year.

Export of products and food products in Kazakhstan is supported by: JSC Development Bank of Kazakhstan, JSC Agricultural Lending Corporation, JSC Export Lending Insurance Corporation KazExportGarant, National Agency for Export and Investment KAZNEX INVEST [6, 7].

JSC Development Bank of Kazakhstan provides financing of investment projects, and offers lending services for export operations, including co-financing by providing loans to the suppliers of Kazakhstani products as well as the buyers of Kazakhstani products.

In lending to export operations, the terms are determined depending on the conditions of the export operation. The minimum loan amount provided by the JSC Development Bank of Kazakhstan for the export operation is 1 mln USD.

One of the strategic directions of the activities of the JSC Agricultural Lending Corporation (hereinafter referred to as the Corporation) is to promote the development and realization of the export potential of the AIC of Kazakhstan, which is characterized by the following objectives:

- monitoring of export-oriented investment projects on production of meat and meat products financed by the Corporation;
- expansion of infrastructure for grain storage and export;
- Stimulation of agricultural producers by lending to the development of livestock production, including pasture grazing.

National Institute of Development of the Republic of Kazakhstan - JSC "National Agency for Export and Investment "KAZNEX INVEST"- assists in development and promotion of non-primary exports Kazakhstan and attraction of direct foreign investments in priority sectors of economy of Kazakhstan.

JSC "KAZNEX INVEST" provides State financial support to domestic exporters, by reimbursing 50% of costs of the industrial and innovative activities of the entities of country incurred in the product sales or services to the foreign markets.

Types of costs to be reimbursed: costs associated with the promotion of specific products, external market services; procedures related to the registration of trademarks and certification of products for export to foreign markets; payment of training services for employees engaged in export management, marketing research services.

In the Republic of Kazakhstan, a base for public support for exports has been created, including a network of development institutions, a legislative basis which complies with the international requirements. However, the potential of public support is not fully used, often due to the fact that potential legal or physical persons have insufficient information, as well as the limited or inadequate elaboration of practical implementation mechanisms.

Exported goods include beef, lamb, pork, grain, oilseeds and processed products, as well as potatoes and vegetables.

The growth of consumption markets opens new opportunities for organizations operating in production and export of food and raw food products. The factor of natural increase in the world population which results in the increased food consumption allows the Food Corporation, as well as private domestic exporters, to develop long-term plans on development of export potential of Kazakhstani agricultural products.

Like other Kazakhstani companies, the Food Corporation is dependent on the influence of the economic factor and bears financial risks in case of the changed terms of attracting loans on capital markets, currency fluctuations, increased costs of purchased agricultural products, due to the growth of raw material prices, increased transportation tariffs, decrease of the world prices and decreased demand on export markets, decreased purchasing power when selling agricultural products on domestic market.

Low rates of modernization of agriculture affect the ability of domestic agricultural producers to steadily increase production volumes and ensure the quality of agricultural products. In turn, this techno-

logical factor affects the operations of the Food Corporation, and the implementation of plans to stabilize export supplies and consolidate the positions of Kazakhstan agricultural products on the world market.

In addition, it is necessary to take into account the influence of the geopolitical factor as the fundamental basis for the development of interstate relations in the world. Competition between countries for resources, economic and political influence increasingly lead to the development of protective measures by the States, the application of tariff and technical barriers designed to protect their market and restraining exports, including Kazakhstani agricultural products.

The State Program on the Development of Agro-Industrial Complex of the Republic of Kazakhstan for 2017-2021 is aimed at the development of export-oriented agricultural and food products.

The introduction of a set of measures will enhance the rapid development of agro-industrial production of the republic, and in 2021 as compared to 2016 it will increase by 33%, the efficiency of crop production by 40% and livestock production by 58%.

Based on a study of the geographical location of Kazakhstan, the capacity of agricultural market, transport accessibility, it can be concluded that potential sales markets include the countries of the EAEU, the CIS, China, Iran, Afghanistan and the United Arab Emirates.

In terms of industries with high export potential, which have a union specialization, it is necessary to establish large specialized commodity zones and optimal commodity flows in order to ensure joint food security. As for the branches of regional specialization, it is necessary to use the mechanism of formation of the effective system of marketing and promoting products in the near future, ensuring a level of self-sufficiency of domestic food products by at least 75-80%.

Further work of the State on solving the systemic problems of domestic livestock production will create conditions for the realization of the export potential of meat products of the Republic of Kazakhstan. Important tasks are to reduce costs and ensure consistently high quality characteristics of products, eliminate tariff and technical barriers on markets of importing countries, diversify export supplies to foreign markets [8].

For Kazakhstan, potential trade partners with growing meat consumption markets are the Middle East countries (including Kuwait, Bahrain, Qatar, Saudi Arabia, UAE), as well as Iran, Russia and China. Import of meat products by these markets in 2017 amounted to 10.5 mln. tons.

For the formation of export-oriented products and food in Kazakhstan it is proposed: to improve the State support of agricultural producers in production, processing and sales on domestic and world markets, taking into account the natural and climatic conditions in the regions, using the "Export Center" of the AIC.

The export products are beef, lamb, pork, grain, oilseeds and their processing products, potatoes and vegetables and other products.

Agriculture requires a large-scale modernization of the production means, introduction of intensive technologies, State financial support aimed to meet the needs of domestic and foreign markets.

The structure of exports should be aimed at reducing the volume of raw materials in their high value added processing.

Conclusions. Analysis of the external and internal environment allows us to state that agro-industrial complex of Kazakhstan has prospects for further growth and development as one of the leading branches of the national economy;

agriculture needs a large-scale modernization of production means and infrastructure, introduction of advanced farming technologies, and the improvement and maintenance of product quality;

□ Systemic public support for the development of agricultural sectors is required, aimed at meeting the needs of the domestic market and implementing a centralized policy to promote exports;

□ due to the population growth in the world, there is a long-term trend of increasing demand for food on the world market;

□ Environmentally friendly and high quality products are the main competitive advantages of domestic agricultural production, which contribute to the strengthening of Kazakhstan's positions on foreign sales markets;

□ The export structure of Kazakhstani agricultural products should be aimed at reducing the share of raw materials in favor of high value added agricultural products;

□ To stimulate the production of export-oriented agricultural products in AIC, synergy between the efforts of all companies of JSC Holding Kaz Kaz Agro is needed, as well as other financial institutions that provide lending to agriculture;

□ grain industry as an important component of the country's food security needs the participation of the State in order to preserve measures of influence on domestic market.

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М. И. Сигарев, М. Т. Кантуреев

Қазақ агроөнеркәсіп кешенінің экономикасы және ауылдық аумақтарды дамыту ҒЗИ, Қазақстан

ҚАЗАҚСТАНДАҒЫ ЭКСПОРТҚА БАҒЫТТАЛҒАН ӨНІМДЕР МЕН АЗЫҚ-ТҮЛІК НАРЫҒЫ

Аннотация. Аграрлық өндіріс халықты тағам өнімдерімен және өнеркәсіпті шикізатпен қамтамасыз етеді, ел экономикасының кірістілігін қалыптастырады. Ауыл шаруашылығы өнімдері мен азық-түлік экспортын қолдау шаралары мен тетіктері халықаралық тәжірибе негізінде жетілдірілуде, бұл Қазақстанның әлемдік экономикаға кірігуі жағдайында ауылдық аймақтарда экспортқа бағдарланған ауыл шаруашылығы өнімдерінің нарығын тиімді мемлекеттік реттеуді талап етеді. Дамыған елдердегі экспорт қаржылық және ұйымдық тетіктерді қамтитын мемлекеттік сауда кәсіпорындарының экспорттық субсидияларын, экспорттық несиелер беруді, сақтандыруды ескере отырып, ДСҰ нормалары мен ережелерін сақтай отырып реттеледі. Қаржылық тетік экспортты және импортты несиелендіруден, несиелер бойынша пайыздарды төлеуге арналған шығындардың бір бөлігін өтеуден, экспорттық сақтандырудан, экспорттық өндірісті ынталандырудан (салық жеңілдіктері, инфрақұрылымды қаржылық дамыту, тікелей шетелдік инвестицияларды ынталандыру, гранттар ұсыну, жеке салымдар, ғылыми-зерттеу жұмыстарын субсидиялау) тұрады. Талдау көрсеткендей, азық-түлік тауарлары өндірісінің өсу қарқыны тұтыну көлеміне және халықтың табыстарына жауап бермейді, бұл Қазақстанда бұрын өндірілген тауарлар импорты есебінен толықтырылады: сары май және өсімдік майы, ірімшік, шұжық өнімдері, қант, жеміс-көкөніс және ет консервілері.

Түйін сөздер: аграрлық сектор, нарық, экспорт, азық-түлік тауарлары, инвестициялар, инфрақұрылым, несиелер, салықтар, кірістер.

М. И. Сигарев, М. Т. Кантуреев

Казахский НИИ экономики и агропромышленного комплекса и развития сельских территорий, Казахстан

РЫНОК ЭКСПОРТООРИЕНТИРОВАННОЙ ПРОДУКЦИИ И ПРОДОВОЛЬСТВИЯ В КАЗАХСТАНЕ

Аннотация. Аграрное производство обеспечивает население продуктами питания и промышленность сырьем, формирует доходность экономики страны. Меры и механизмы поддержки экспорта сельскохозяйственной продукции и продовольствия совершенствуются на основе международной практики, что требует эффективного государственного регулирования рынка экспортоориентированной сельскохозяйственной продукции в сельских регионах в условиях интеграции Казахстана в мировую экономику. Экспорт в развитых странах регулируется с соблюдением норм и правил ВТО, с учетом экспортных субсидий государственных торговых предприятий, экспортного кредитования, страхования, включающих финансовый и организационный механизмы. Финансовый механизм состоит из кредитования экспорта и импорта, возмещения части затрат на уплату процентов по кредиту, экспортного страхования, стимулирования экспортного производства (налоговые льготы, финансовое развитие инфраструктуры, стимулирования прямых иностранных инвестиций, предоставления грантов, частных вложений, субсидирования научно-исследовательских работ.). Анализ показывает, что темпы роста производства продовольственных товаров не отвечают объемам потребления и доходам населения, что восполняется за счет импорта товаров, которые ранее производились в Казахстане: масло сливочное и растительное, сыры, колбасные изделия, сахар, плодоовощные и мясные консервы.

Ключевые слова: аграрный сектор, рынок, экспорт, продовольственные товары, инвестиции, инфраструктура, кредиты, налоги, доходы.

Information about authors:

Sigarev M. I., Dr. Econ.Sc., professor, corresponding member of the AAS RK Kazakh RI of AIC Economy and Rural Development, Almaty, Kazakhstan; i.taipova@mail.ru; <https://orcid.org/0000-0002-9377-8318>

Kantureyev M.T., Dr. Econ. Sc., Director General Kazakh RI of AIC Economy and Rural Development, Almaty, Kazakhstan; m_rantureyev@mail.ru; <https://orcid.org/0000-0003-3566-3034>

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