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PRODUCTION CAPACITY OF FOOD INDUSTRY IN KAZAKHSTAN

Abstract

The main purpose of the article is to describe the theoretical features of competitiveness and efficiency of production of agricultural sector of the Republic of Kazakhstan. When writing the work, economic and statistical methods, methods of comparison and analysis, synthesis and generalization were used.The article deals with the main indicators of the industry: domestic production and consumption; foreign trade and market size in the Republic of Kazakhstan. The main conclusions of the article are to determine the factors that state the competitive position of the fruit and vegetable industry in the Republic of Kazakhstan, as the agro-industrial complex needs to be improved, which would be based on scientifically based mechanisms and directed to the development of agricultural enterprises. In Kazakhstan, it is strategically beneficial to engage in the industrial processing of fruits and vegetables, which is due to the favorable climate, access to labor resources, growing demand from the population, and an increase in export potential. In general, the country meets the need for potatoes, fresh vegetables and melons. However, high prices, a narrow range of products, lack of proper presentation associated with the high cost of packaging and packaging, high transport costs, and a decrease in consumer demand for domestic fruits and vegetables in the domestic and foreign markets have led to their lack of competitiveness.

Key words: agro-industrial complex, fruit and vegetable production, competitiveness, export, import, method, development.

Introduction

Agribusiness is a diversified system that includes agriculture, sectors of the economy for the production of means of production for agriculture, processing industry and infrastructure. Therefore, assessing the competitiveness of agriculture, it is necessary to take into account the state and performance of all its constituent sectors.

The total budget of the Program 2019–2021 is 2,374,2 billion tenge, of which the National budget – 1,216 billion tenge, the local budget – 904 billion tenge and other sources – 306.2 billion tenge).

Main provisions

One of the main specialized food complexes of Kazakhstan is fruit and vegetable canning, which has favorable natural and economic conditions and large-scale land resources. In improving the supply of vegetables, fruits and products of their processing, an important place belongs to the development of fruit and vegetable production. The basis of its formation is the production cycle, developing on the basis of cultivation and processing of vegetables and fruits [2].

Materials and methods

As a market overview, the analysis was made on the following key indicators of the industry: domestic production and consumption; foreign trade and market size.

Let us turn to the data of official statistics on the gross harvest of open and closed ground vegetables for 2014–2018 (see table 1).

During the period from 2014 to 2018, the gross harvest of vegetables in the country is gradually growing and reached 3 795.2 thousand tons in 2018. The main areas traditionally producing vegetables, are Almaty (944,2 thousand tons), the Turkestan region (944,2 thousand tons) and Zhambyl (718,8 thousand tonnes) region. The total share of the three regions is 68.70% of the gross national tax.

Gross harvest of open ground vegetables shows a steady growth dynamics increased gross harvest of onions, cucumbers, cabbage, pumpkin, eggplant and pepper. The dynamics of the average yield shows a uniform annual growth, which is correlated with the gross harvest of vegetables in the whole country.

Table 1 – Gross collection of vegetables of open and closed ground according to CS MNE RK (in thousands of tons)

	2014	2015	2016	2017	2018	2019	2020
Republic Kazakhstan	3 061,5	3 241,5	3 469,9	3 564,9	3 795,2	3 791,1	4 081,9
The Akmolinsky	55,4	58,8	63,9	62,4	69,4	60,4	54,6
The Aktyubinsk	69,9	62,8	63,3	63,4	67,5	76,6	79,6
The Almaty	842,7	895,6	932,4	947,9	944,2	951,3	993,1
The Atyrausky	51,4	51,6	61,8	71,1	71,7	73,1	78,2
West Kazakhstan	54,4	56,8	57,4	61,3	63,7	52,5	57,9
The Zhambylsky	443,4	496,7	616,3	645,3	718,8	748,9	847,3
The Karaganda	94,2	90,8	90,7	96,0	98,4	101,9	102,2
The Kostanajsky	60,8	73,6	71,1	72,8	76,9	76,1	75,5
The Kyzylordinsky	105,7	108,0	70,2	72,9	80,4	82,7	88,0
The Mangistausky	5,8	4,1	5,1	5,7	5,1	7,7	7,7
South Kazakhstan	749,7	756,2	812,9	854,1	944,2	915,8	–
The Turkistan	–	–	–	–	–	–	981,1
The Pavlodar	130,5	161,3	183,7	175,8	208,8	216,0	200,2
North Kazakhstan	170,0	190,3	191,9	197,6	203,1	179,1	207,8
East Kazakhstan	219,8	228,2	242,8	232,1	236,1	236,5	259,1
The city of Nur-Sultan	3,5	2,8	2,5	2,5	1,1	1,0	0,9
The city of Almata	4,3	3,9	3,9	4,0	5,8	11,5	12,3
Note – Compiled from the SC of MNE RK [3].							

Next, we consider the data of the gross collection of vegetables in the closed ground within the category. Over the past five years, the use of areas for greenhouses has increased significantly by almost 3.5 times from 2014 to 575.9 hectares.

If in 2014 the main crop for planting in greenhouses was tomatoes, by 2018 the share of areas for tomatoes (59%) and cucumbers (41%) was almost equal.

The leader in the use of technologies of greenhouse production is the Turkestan region – 79% of the total area used for greenhouses. The popularity of the use of greenhouse technologies also takes place in Almaty and Karaganda. At the same time, only agricultural enterprises are engaged in greenhouse business in Karaganda, while in the Turkestan region 43% of greenhouse areas are in private farms. 43% of the gross harvest of vegetables in greenhouses falls on farms, 37% on farms.

Table 2 – Consumption of basic foodstuffs by the population for 2014–2020, average per capita per year, kg

	2014	2015	2016	2017	2018	2019	2020
Oils and fats	18,1	18,2	18,7	19,3	19,5	19,5	19,2
Fruits	59,4	60,8	60,8	64,4	61,4	64,6	74,9
Vegetables (without potato's	86,3	87,8	86,6	90,2	89,3	88,5	94,1
potato	48,8	48,7	48,5	48,5	48,6	46,9	48,6
Note – Compiled from the SC of MNE RK [3].							

The leader in imports in 2017 is onions, which amounted to 158.4 thousand tons, and exports – 36.9 thousand tons. Importaut in 2017 in real terms reached to 69.3 thousand tons, and exports – 1.7 thousand tons. Pepper – 14.9 thousand tons of imports and 1.3 thousand tons of exports; cucumbers and gherkins – 10.5 thousand tons of imports and 940 tons of exports; eggplant – 2.6 thousand tons of imports and 60 tons of exports; tomatoes – 65.2 thousand tons of imports and 1.4 thousand tons of exports; carrots canteen – 70.5 thousand tons of imports and 1.4 thousand tons of exports; garlic – 5.6 thousand tons of imports and 30 tons of exports; beet canteen – 3.5 thousand tons of imports and 270 tons of exports.

As of 2017, the leader importing potatoes to Kazakhstan in the largest volumes is Pakistan (56% of the total potato imports), and Kyrgyzstan is already 31%. The leader importing tomatoes to Kazakhstan in the largest volumes is Uzbekistan (52% of the total volume of tomato imports), and China is already 43%. Imports of Luca to Kazakhstan in the largest volumes, according to the former Tajikistan (64% of the total imports of onions), and Kyrgyzstan is already 10%. Increased the share of Uzbekistan in the onions and amounted to 20%. Cabbage is supplied to Kazakhstan in the largest volumes by Uzbekistan(76% of the total volume).The leader importing lettuce to Kazakhstan is Uzbekistan (36% of total lettuce imports) and Poland (20%), while China and Belarus account for 18% and 1% respectively. Countries, importing carrots, turnips, beets, celery, radishes and other edible roots in Kazakhstan in the greatest volumes remain Kyrgyzstan (58% of the total volume of import categories), and Uzbekistan (34%).

In 2017, the leaders importing cucumbers and gherkins to Kazakhstan in the largest volumes remain Uzbekistan (58% of the total imports of the category), as well as China (37%).

Consider the exporting countries of our vegetable products. As of 2017, Russia (54% and 56% of the total potato exports, respectively) and Turkmenistan (16% and 23%, respectively) are the leaders exporting potatoes from Kazakhstan in the largest volumes. The leader exporting tomatoes from Kazakhstan is Russia (100% of the total exports of tomatoes), as well as cabbage(100% and 99% of the total exports of cabbage, respectively), carrots, turnips, beets, celery, radishes and other similar edible roots (100% and 77% of the total exports of the category, respectively). Exports of onions from Kazakhstan in the largest volumes Uzbekistan (57% and 54% of the total exports of onions, respectively).

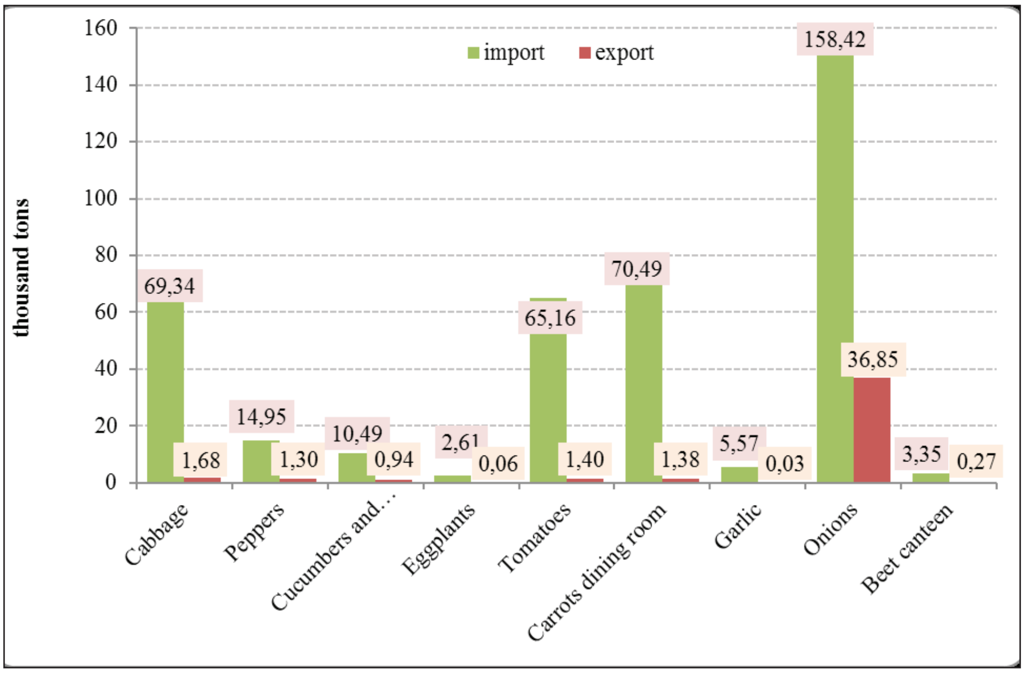

Figure 1 – Foreign Trade turnover of vegetables in real terms for 2017

Note – Compiled from the SC of MNE RK [3].

The list of the main importing countries of vegetable products in Kazakhstan is as follows:
- Potatoes – Pakistan (56%), Kyrgyzstan (31%);
- Tomatoes – Uzbekistan (52%), China (43%);
- Onion – Tajikistan (64%), Uzbekistan (20%);
- Cabbage – Uzbekistan (89%);
- Salad-lettuce – Uzbekistan (36%), Poland (20%);
- Carrots, beets, radishes, celery – Kyrgyzstan (58%), Uzbekistan (34%);
- Cucumbers – Uzbekistan (58%), China (37%).

To calculate the market capacity of the main categories of vegetables, the official data of the Committee on statistics of Kazakhstan and the data of the customs control Committee of Kazakhstan were used.

Table 3 – Vegetable market Capacity in 2017 in real terms (tons)

The name of the category	Production	Import	Export	Capacity
Cabbage	498 555,8	69 343,9	1 683,1	566 216,6
Peppers	182 569,6	14 954,8	1 299,0	196 225,4
Cucumbers and gherkins	396 608,3	10 486,8	941,2	406 153,9
Eggplants	84 253,9	2 607,3	55,5	86 805,7
Tomatoes	687 687,4	65 163,2	1 398,6	751 452,0
Carrots dining room	522 504,7	70 490,6	1375,2	591 620,1
Garlic	27 594,3	5 566,8	28,5	33 132,6
Onions	685 936,3	158 417,7	36 850,6	807 503,4
Note – Compiled from the SC of MNE RK [3].				

According to table 3, according to the statistics Committee and the customs control Committee of Kazakhstan, the market capacity of onions, tomatoes, carrots, cabbage and cucumbers is the largest. Conversely, the market capacity of eggplant and garlic is not so large in comparison with other categories of vegetables.

Results

As a result of our research, we can identify the following factors that determine the competitive position of the fruit and vegetable industry in Kazakhstan:

1. Economic and geographical position of the region, which is characterized by a number of indicators: access to other territories of the country, as well as to other countries, to raw materials, to markets, transport routes.
2. Raw materials, which are characterized mainly by their availability and utilization. Allocate mineral,land, forest, water, fauna and other resources.
3. Demographic resources are characterized by the total population, sex and age composition, dynamics of population changes. Labor resources are characterized by the availability, skills and cost of labor.
4. Productive capacity, characterized by the presence of fixed assets, the coefficients of utilization of production capacities and production areas, the ratios of disposal and renewal of basic production assets, the degree of depreciation of fixed assets, the age structure of production equipment, Fondo and work of electric power.
5. Financial resources. One of the main reasons for the preservation of crisis phenomena in the industrial and financial spheres is the lack of working capital. The reduction of investments in production is due to a decrease in state financing of investment programs and the amount of funds of the enterprises themselves.

Thus, the competitiveness of the agro-industrial complex implies the presence of competitive advantages not only of agriculture, but also of industries for the production of funds for the production of agriculture and processing of agricultural products.

Discussion

The domestic food industry, having a good experience in the production of benign products made from natural raw materials, has a good chance to enter in the future with its products to foreign markets, thus increasing its contribution to the development of the economy of Kazakhstan.

In Kazakhstan, it is strategically advantageous to engage in industrial processing of fruits and vegetables, which is due to the favorable climate, access to labor resources, growing demand from the population, the growth of export potential. The Republic as a whole meets the need for potatoes, fresh vegetables and melons. However, high prices, a narrow range of products, the lack of proper presentation associated with the high cost of packaging and packaging, high transport costs, a decrease in consumer demand for domestic fruits and vegetables in the domestic and foreign markets have led to their uncompetitiveness.

For the development of the food industry it is necessary to create competitive markets, formation of favorable conditions for the emergence and entry of new participants, as well as the competitive environment, the development of tools to facilitate the development of competition includes measures of Antimonopoly regulation, other protective measures as well as measures for regional development, widening opportunities and stimulating business activity [4].

Conclusion

In modern conditions, to improve the competitiveness of enterprises, it is necessary to revise their production capacity. By means of restructuring of the enterprise aimed at liquidation of unprofitable productions, replacement of non-progressive technological processes with innovative and resource-saving. The result should be reduced production costs and increased sales.

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ҚАЗАҚСТАННЫҢ ТАМАҚ ӨНЕРКӘСІБІНІҢ ӨНДІРІСТІК ҚУАТЫ

Аңдатпа

Мақаланың негізгі мақсаты Қазақстан Республикасының аграрлық секторы өнімдерінің бәсекеге қабілеттілігі мен өндіріс тиімділігінің теориялық ерекшеліктерін сипаттау болып табылады. Зерттеу барысында абстрактілі-логикалық, монографиялық, экономикалық және статистикалық әдістер, салыстыру және талдау, синтез және жалпылау тәсілдері қолданылды. Ғылыми мақалада негізгі көрсеткіштері саланың дамуы: ішкі өндіріс және тұтыну; сыртқы сауда және мөлшері Қазақстан Республикасының нарықтық дамуын сипаттайды. Мақаланың негізгі тұжырымдары Қазақстан Республикасында жеміс-жидек және көкөніс өнеркәсібінің бәсекелестік қабілеті ұстанымдарын анықтайтын факторларды анықтау болып табылады, өйткені агроөнеркәсіп кешені ғылыми негізделген тетіктерге негізделіп, АӨК кәсіпорындарын дамытуға бағытталатын жетілдіруді қажет. Қазақстанда жеміс-жидек пен көкөністі өнеркәсіптік өңдеумен айналысқан тиімді, бұл климаттың қолайлы болуына, еңбек ресурстарына қол жетімділікке, халықтың сұранысының артуына және экспорттық әлеуеттің артуына байланысты. Жалпы, республика картопқа, жаңа піскен көкөністер мен бақша дақылдарына деген қажеттілікті қанағаттандырады. Алайда, жоғары бағалар, тауарлардың тар ауқымы, орауыш пен қаптаманың қымбаттығымен байланысты тиісті презентацияның болмауы, көлік шығындарының жоғарылығы және ішкі және сыртқы нарықтарда тұтынушылардың отандық жемістер мен көкөністерге деген сұранысының төмендеуі бәсекеге қабілеттіліктің жоқтығы.

Тірек сөздер: агроөнеркәсіп кешені, жеміс-көкөніс өндірісі, бәсекеге қабілеттілік, экспорт, импорт, әдіс, даму.

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ПРОИЗВОДСТВЕННЫЕ МОЩНОСТИ ПИЩЕВОЙ ПРОМЫШЛЕННОСТИ КАЗАХСТАНА

Аннотация

Целью статьи является описание теоретических особенностей конкурентоспособности и эффективности производства продукции аграрного сектора Республики Казахстан. При написании работы были использованы экономико-статистические методы, методы сравнения и анализа, синтеза и обобщения. В научной статье рассматриваются основные показатели развития отрасли: внутреннее производство и потребление; внешняя торговля и размер рынка в Республике Казахстан. Основные выводы статьи связаны с определением факторов, определяющих конкурентные позиции плодоовощной промышленности в Республике Казахстан. Агропромышленный комплекс нуждается в развитии, которое должно основываться на научном обосновании механизмов и методов, а также направляться на развитие предприятий АПК. В Казахстане выгодно заниматься промышленной переработкой фруктов и овощей, что связано с благоприятным климатом, доступом к рабочей силе, растущим спросом и увеличением экспортного потенциала. В целом страна удовлетворяет спрос на картофель, свежие овощи и бахчевые культуры. Однако высокие цены, узкий ассортимент товаров, отсутствие должного товарного вида из-за дороговизны упаковки, высоких транспортных расходов и снижения потребительского спроса на отечественные фрукты и овощи на внутреннем и внешнем рынках неконкурентоспособны.

Ключевые слова: агропромышленный комплекс, плодоовощное производство, конкурентоспособность, экспорт, импорт, метод, развитие.