IRSTI 06.71.07
UDC 338.262
DOI: 10.46666/2023-2.2708-9991.09 https://www.jpra-kazniiapk.kz

MULTIVECTOR FEATURES OF AGRICULTURAL PRODUCTION IN THE REPUBLIC OF KAZAKHSTAN

ҚАЗАҚСТАН РЕСПУБЛИКАСЫНДАҒЫ АУЫЛ ШАРУАШЫЛЫҒЫ ӨНДІРІСІНІҢ КӨПТҮРЛІЛІГІ

РАЗНОВЕКТОРНОСТЬ СЕЛЬСКОХОЗЯЙСТВЕННОГО ПРОИЗВОДСТВА В РЕСПУБЛИКЕ КАЗАХСТАН

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Abstract. In the current position of Kazakhstan on the world stage, food production accounts for more than 50% of the country's trade turnover, in this regard, the industry's prospects are to saturate food market and provide the population with jobs. *Purpose* - the article shows the current state of food industry of the republic. *Methods* – analysis and synthesis, statistical, factorial, on the basis of which the assessment of current situation of food enterprises was made. *Results* – on the example of the Akmola region, indicators of the effectiveness of large, medium and small agricultural enterprises were identified. Sectoral, regional, socio-economic aspects of the development of food industry are considered. Assessing its place and role in food security, real opportunities and scientific and practical prerequisites for expanding the business environment and increasing employment are outlined. The authors point out the need for further development of the processing sector, which will provide agricultural producers with markets for their products, create conditions for employment, attract investments to the region, ensure socio-economic stability in the region, and improve the quality of life. The article presents the standards of budget subsidies for certain types of food. The importance of monitoring promising trends in food production in the country, which are currently little studied, is noted. *Conclusions* – agro-industrial complex of Kazakhstan is characterized by multi-vector sectoral parameters that affect the competitiveness of food products. Emphasis

is placed on the relevance of organization of agro-logistic and service, wholesale and distribution centers. The solution of issues related to the supply of the population with food products in the required volumes is a priority task of state policy.

Аңдатпа. Қазақстанның әлемдік аренадағы қазіргі ұстанымында азық-түлік өнімдерін өндіруге елдің тауар айналымының 50%-дан астамы келеді, осыған байланысты саланың перспективалары азық-түлік нарығын қанықтыру, халықты жұмыс орындарымен қамтамасыз ету болып табылады. *Мақсаты* – мақалада республиканың тамақ өнеркәсібінің қазіргі жағдайы көрсетілген. *Әдістері* – талдау және синтез, статистикалық, факторлық, олардың негізінде тамақ кәсіпорындарының ағымдағы жағдайын бағалау. *Нәтижелері* – Ақмола облысының мысалында ірі, орта және шағын ауыл шаруашылығы кәсіпорындарының тиімділік көрсеткіштері анықталды. Тамақ өнеркәсібін дамытудың салалық, өңірлік, әлеуметтік-экономикалық аспектілері қарастырылады. Оның азық-түлік қауіпсіздігіндегі орны мен рөлін бағалай отырып, кәсіпкерлік ортаны кеңейтудің, жұмыспен қамтуды арттырудың нақты мүмкіндіктері мен ғылыми-практикалық алғышарттары баяндалған. Авторлар қайта өңдеу секторын одан әрі дамыту қажеттігін көрсетеді, бұл ауыл шаруашылығы тауарын өндірушілерге өндірілген өнімді өткізу нарықтарын ұсынуға, жұмысқа орналасу үшін жағдай жасауға, өңірге инвестициялар тартуға, өңірдегі әлеуметтік-экономикалық тұрақтылықты қамтамасыз етуге, өмір сүру сапасын жақсартуға мүмкіндік береді. Мақалада азық-түліктің кейбір түрлеріне бюджеттік субсидиялардың нормативтері келтірілген. Қазіргі уақытта аз зерттелген елдегі тамақ өндірісінің перспективалық тенденцияларын бақылаудың маңыздылығы атап өтілді. *Қортындылар* – Қазақстанның агроөнеркәсіптік кешені шығарылатын тамақ өнімдерінің бәсекеге қабілеттілігіне әсер ететін әртүрлі векторлық салалық параметрлермен сипатталады. Агрологиялық және сервистік, көтерме-тарату орталықтарын ұйымдастырудың өзектілігіне баса назар аударылды. Халықты қажетті көлемде азық-түлік тауарларымен қамтамасыз етуге байланысты мәселелерді шешу мемлекеттік саясаттың басым міндеті болып табылады.

Аннотация. В современной позиции Казахстана на мировой арене на производство продуктов питания приходится более 50% товарооборота страны, в связи с этим, перспективы отрасли заключаются в насыщении продовольственного рынка, обеспечении населения рабочими местами. *Цель* – в статье показано существующее состояние пищевой промышленности республики. *Методы* – анализа и синтеза, статистический, факторный, на основе которых произведена оценка текущей ситуации пищевых предприятий. *Результаты* – на примере Акмолинской области выявлены показатели эффективности крупных, средних и малых сельхозпредприятий. Рассматриваются отраслевые, региональные, социально-экономические аспекты развития пищевой индустрии. Оценивая ее место и роль в продовольственной безопасности, изложены реальные возможности и научно-практические предпосылки расширения предпринимательской среды, повышения занятости. Авторы указывают на необходимость дальнейшего развития перерабатывающего сектора, что позволит предоставить сельхозтоваропроизводителям рынки сбыта произведенной продукции, создавать условия для трудоустройства, привлекать в регион инвестиции, обеспечить социально-экономическую стабильность в регионе, улучшить качество жизни. В статье представлены нормативы бюджетных субсидий на некоторые виды продовольствия. Отмечается важное значение мониторинга перспективных тенденций пищевого производства в стране, которые в настоящее время мало изучены. *Выводы* – агропромышленный комплекс Казахстана характеризуется разновекторными отраслевыми параметрами, влияющими на конкурентоспособность выпускаемых продуктов питания. Сделан акцент на актуальность организации агрологистических и сервисных, оптово-распределительных центров. Решение вопросов, связанных со снабжением населения продовольственными товарами в необходимых объемах, является приоритетной задачей государственной политики.

Key words: agro-industrial complex, production, processing enterprises, products, food market, business environment, food security, quality of life of the population.

Түйінді сөздер: агроөнеркәсіптік кешен, Өндіріс, өңдеу кәсіпорындары, өнімдер, азық-түлік нарығы, кәсіпкерлік орта, азық-түлік қауіпсіздігі, халықтың өмір сүру сапасы.

Ключевые слова: агропромышленный комплекса, производство, перерабатывающие предприятия, продукции, продовольственный рынок, предпринимательская среда, продовольственная безопасность, качество жизни населения.

Introduction. The conceptual importance of the development of the country's economy consists in the functioning of its main industries. The share of the agricultural sector in the structure of the gross domestic product (GDP) is only 5-6%. The development of small and medium-sized businesses in rural areas will lead to positive changes. The dynamic state of entrepreneurial structures in agriculture in Kazakhstan is accessed as low. So, at the beginning of 2021, there were only 18 631 legal entities, branches and representative offices in the industry with the type of economic activity “Crop production, animal husbandry, hunting and provision of services in these areas”; 1 344 individual entrepreneurs; 225 030 peasant or farm farms; 1 636 249 households of settlements, villages, rural districts [1].

Currently, three main groups of agricultural producers have been officially formed in the multicultural economy of Kazakhstan: entrepreneurial structures - agricultural enterprises, peasant (farmer) farms, as well as households of the population that do not belong to entrepreneurial structures.

For a systemic assessment of the socio-economic activity of entrepreneurship of various forms of management, it is necessary to study the external and internal economic situation in each region, specific and rural districts, depending on the emerging structure of production.

The authors analyze the economic assessment of the agricultural sector of the Republic of Kazakhstan, identify problematic issues in the development of the industry and develop proposals to improve the efficiency of entrepreneurship management in agriculture.

Material and methods of research. The author's research was based on the use of general scientific methods of scientific cognition of socio-economic processes, including the study and processing of theoretical and practical materials, economic analysis of statistical data, and justification of the results obtained. The modern management allows to consider the management of the industry from the perspective of structural approaches. In this connection, the article gives an economic assessment of certain categories of farms, focusing on the study of production figures of basic types of products in agricultural formations. The norms of budget subsidies for products of own production are investigated. Based on the Concept of the development of the agro-industrial complex of the Republic of Kazakhstan for 2021-2030, the prospects for the development of the industry are shown and, accordingly, the authors place special emphasis on the need to improve the methods of state regulation of the industry in modern economic conditions.

Having systematized the work done, the authors identify problematic issues and develop a number of recommendations. The key and significant issues of the industry development and management are identified. First of all, this concerns the inefficient distribution and use of resources in food production, where there are significant difficulties in the production activities of domestic producers.

Results and their discussion. The agricultural sector largely depends on industry, which, by presenting demand for agricultural raw materials, forms the structure of agriculture. The significance of the industry is quite pronounced in the regional context of Kazakhstan, which is important for determining growth of territories with a low level of industrial production and infrastructure facilities [2-3].

The existing different business structures show different production efficiency, which depends on many factors, including regional conditions, the size of enterprises, the types of products produced and the management mechanism used. According to the research of Kazakhstani scientists, the share of profitable agricultural enterprises ranges from 43% to 52%, with fluctuations by year and region. An analysis of the financial activities of enterprises shows that most of them do not have sufficient income for long-term investments in order to ensure sustainable development and increase competitiveness (table 1) [4].

Table 1 - The share of individual categories of farms in total output in 2018-2020 (percentage)

Category of farms	Years	Grain	Potatoes	Vegetables	Meat in slaughter weight	Milk	Eggs
Agricultural enterprises	2018	61,9	4,2	5,9	6,5	4,9	50,2
	2019	62,0	4,9	6,85	11,1	3,2	58,5
	2020	60,9	4,7	4,7	13,7	3,4	63,4
Peasant (farm) farms	2018	37,0	11,3	22,6	6,3	4,1	0,7
	2019	33,7	21,3	39,5	9,5	7,0	0,4
	2020	38,8	23,7	42,3	9,6	7,1	0,4
Households of	2018	1,1	84,5	71,5	87,2	90,8	49,1

the population	2019	0,2	79,7	54,8	79,4	89,8	41,0
	2020	0,3	71,6	53,0	76,7	89,5	36,2
Note: compiled according to the reports of the Kazakh Research Institute of Economy of Agro-Industrial Complex and Rural Development							

The results of the activities of agricultural enterprises also differ by type of farms. High results have been achieved in large farms, where the number of employees exceeds more than 250 people. Table 2 shows the efficiency of production in large, medium and small agricultural enterprises on the example of the Akmola region.

Table 2 - Production efficiency in large, medium and small agricultural enterprises of Akmola region (per 1 enterprise)

Indicator	Unit of measurement	Operating enterprise	Of which		
			large	medium	small
Number of farms	unit	664	109	208	317
Farmland	one thousand hectares	11.8	41,6	9,1	2,2
including arable land	«	6,1	20,3	4,2	1,14
Acreage	«	5,8	17,3	3,9	1,1
Structure of crops:					
cereals	%	90,0	85,0	92,5	95,0
fodder	%	8,8	13,0	5,0	4,0
Number of employees	human	95	263	65	19
Cost of 1 ts of grain	tenge	1479,0	1386	1310	1654
1 ts sunflower	«	1 793	1 704	1 618	-
1 ts sunflower	«	1 793	1 704	1 618	-
1 ts of cattle meat (live weight)	«	20 761	19 577	19 100	23 667
1 tsp of milk	«	4 476	4 118	4 386	4 700
Gross agricultural output, total	million tenge	168,2	693,1	126,7	17,8
for 1 employee	thousand tenge	1 770	2 635	1 950	936
Per 100 hectares of farmland		1 425	1 666	1 267	809
Grain yield	hundredweight/hectare	12,6	12,8	12,3	11,8
Meat yield per 1 structural head (live weight)	kilogram	76	105	70	58
Note: compiled according to the reports of the Kazakh Research Institute of Economy of Agro-Industrial Complex and Rural Development					

Peasant (farmer) farms have mainly developed as small farms, where one farm accounts for an average of 250 hectares of farmland in the republic and about two million tenge of gross agricultural output. At the same time, 9.1% of all agricultural enterprises are located in the northern region, they account for 37.5% of marketable products and 45.3% of gross income (profit) from the sale of agricultural products in all agricultural enterprises of the republic.

The largest farms in terms of arable land area and gross output are located here. 72.7% of all agricultural enterprises are located in the southern region, however, they account for only 41.6% of marketable products and 32.9% of gross income (profit) received from the sale of agricultural products in all agricultural enterprises of the republic.

In the fields of crop production, the economic indicators of agricultural enterprises and peasant (farm) farms have some differences by type of products [5].

For example, in large farms where crop production prevails (especially grain crops), the best results are achieved in more productive years, but in other years they are inferior in efficiency to peasant (farmer) farms. To ensure the sustainability of development and increase the efficiency of entrepre-neurship of medium-sized and large-scale enterprises, it is important to ensure a rational combination of crop and livestock industries in accordance with the location and specialization in natural and economic zones.

Calculations based on the example of grain and cattle breeding enterprises of the northern region show that on the basis of a rational combination of these industries, it is possible to achieve an increase in output by 1.5-2 times and permanent employment of rural workers is ensured [6].

For agricultural formations, relatively high profitability is provided mainly due to the high profitability of meat and milk production in peasant (farmer) farms (table 3).

Table 3 – The level of profitability of production in agricultural formations in 2018-2019 in the republic in percentage

Year	Agricultural formation	Of which	
		agricultural enterprises	peasant (farm) farms
Cattle			
2018	30,9	5,6	44,8
2019	33,0	10,1	43,6
Sheep and goats			
2018	38,3	16,1	42,1
2019	39,0	12,0	44,0
Pigs			
2018	17,3	9,4	32,3
2019	17,3	3,3	39,3
Horses			
2018	49,6	23,0	55,0
2019	46,9	14,8	53,0
Camels			
2018	25,9	1,2	33,3
2019	21,3	11,3	25,2
Birds			
2018	17,0	17,0	30,0
2019	16,6	16,6	45,1
Milk			
2018	38,8	30,5	45,1
2019	48,6	42,0	53,0
Note: compiled according to the reports of the Kazakh Research Institute of Economy of Agro-Industrial Complex and Rural Development			

On the other hand, labor-intensive crops (potatoes, vegetables and melons) are cultivated most of all in private subsidiary farms, low-productive and non competitive labor is used.

The main factors hindering the development of personal subsidiary farms in rural areas:

* lack of a legal framework and targeted state support;

* lack of own funds, modern equipment and technology;

* shortage, degradation and lack of pastures for livestock. Nowadays, almost all the lands of settlements are used uncontrollably, systemlessly, degraded, and there are no cultural pastures at all;

* lack of concentrated feed and lack of feed mixtures and mineral additives;

* problems in the collection, timely processing and sale of milk and other products to processing enterprises;

* the difficulty of selling products and the location away from food markets and from cities.

Economic theories and practice have convincingly proved that agriculture, due to its specificity, that is, high dependence on natural conditions, the presence of constant risks, high capital intensity, as well as the peculiarities of the functioning of the food market, requires constant state support.

The Concept of development of the agro-industrial complex of the Republic of Kazakhstan for 2021-2030 notes that Kazakhstan's membership in the Eurasian Economic Union and the World Trade Organization creates opportunities and at the same time places high demands on the competitiveness of the agro-industrial complex (AIC) both in domestic and foreign markets. In this regard, an important role is the effective state regulation of the agro-industrial complex and stimulation of its development.

The SWOT analysis of the agro-industrial complex of the Republic of Kazakhstan shows the significant vulnerability of the agricultural sector, both from objective factors – a narrow market for food consumption, lack of direct access to sea transportation, high risks from climatic conditions, limited water resources, unavailability of credit financing, low involvement of second-tier banks in lending industry financing, low development of trade and logistics infrastructure, systems life support in rural areas [7].

Nevertheless, currently there is a lack of measures of state support for the development of dairy and beef cattle breeding. It is necessary to support all economic structures by improving the management mechanism in cattle breeding, which includes the following areas:

● subsidizing the breeding business. Currently, the standards of budget subsidies for partial reduction in price (no more than 50%) of the cost of breeding and breeding young cattle purchased by commodity producers are as follows: for the purchase of domestic breeding young cattle and from the Russian Federation, the Republic of Belarus and Ukraine in the amount of 118 thousand tenge, from Australia, the countries of North and South America - 235 thousand tenge and from European countries – 254 thousand tenge.

It should be recognized that commodity producers buy cattle at a very high price - domestic breeding cattle costs 400 thousand tenge, from Russia – 600 thousand tenge, and from abroad – more than 750-800 thousand tenge or more. Thus, the state reimburses only a small part of the cost of purchasing livestock. Therefore, it can be stated that this amount is insufficient, it is necessary to raise it to at least 200 thousand tenge per 1 head for the purchase of domestic breeding young animals, up to 300 thousand tenge for imported cattle from abroad. These measures are aimed at increasing the number of breeding cattle and the productivity of animals;

● to support small businesses in beef cattle breeding, it is necessary to use a subsidy level with a livestock of at least 50 heads. The existing standards, which are three-level, are aimed at state support of feedlots, where the livestock is not less than 400 head – not less than 3000 head. Of course, such facilities have an economic advantage in all areas of development. But there are also small business entities that lack these advantages (table 4). Nevertheless, they have the right to exist.

Table 4 - Standard of budget subsidies for 1 kg of sold beef of own production, tenge

Existing regulations	
Beef - level I (the presence of a one-time fattening of at least 3 000 heads)	220
Beef - level II (the presence of a one-time fattening of at least 1 500 heads)	170
Beef - level III (the presence of a one-time fattening of at least 400 heads)	120
Additionally proposed option	
Beef - level IV (the presence of a one-time fattening of at least 50 heads)	100
Note: compiled according to the reports of the Kazakh Research Institute of Economy of Agro-Industrial Complex and Rural Development	

In the development of dairy cattle breeding, there are problematic issues that occur in beef cattle breeding. To support small businesses in dairy cattle breeding, we propose to use the level more rationally (livestock of at least 10 heads of dairy cows, milk yield of at least 2 100 kg) (table 5).

Table 5 - Standard of budget subsidies for 1 kg of sold milk of own production, tenge

Existing regulations	
Milk - level I (livestock of at least 350 dairy cows, milk yield of at least 4 500 kg)	25
Milk - level II (livestock of at least 300 dairy cows, milk yield of at least 3 250 kg)	15
Milk -level III (livestock of at least 60 heads of dairy cows, milk yield of at least 2 500 kg)	10
Additionally proposed option	
Milk - IV level (livestock of at least 10 heads of dairy cows, milk yield of at least 2 100 kg)	5
Note: compiled according to the reports of the Kazakh Research Institute of Economy of Agro-Industrial Complex and Rural Development	

Subsidies to the dairy cattle industry for products are currently being carried out at certain levels. However, this is not enough, since these levels are aimed at stimulating only large agricultural formations. Small business remains outside the incentive. In this connection, it is more rational to use the level to stimulate milk production in small family farms, where the number of cattle is at least 10 heads with an average annual milk yield from 1 cow of 2 100 kg. The volume of budget subsidies due to the inclusion of an additional level will increase from 3.8 billion tenge to 4.9 billion tenge or 1.3 times. The subsidized volume of production will increase from 229.3 thousand tons to 460.3 million tons or 2 times. This will amount to 74% of the volume of gross milk in agricultural formations or about 9% of the volume of gross milk in all economic structures.

It is necessary to extend the grace period for participants to pay the first installment on the loan. For the current period, the preferential line for repayment of the principal debt and remuneration is:

- no more than 12 months from the date of issuance of each tranche for the purchase of breeding bulls (pedigree) and replenishment of working capital;

- no more than 24 months from the date of issue of each tranche for the purchase of breeding stock and planned repairs of fixed assets.

Undoubtedly, it is necessary to take into account the various characteristics of livestock and their role in reproduction, and hence it is recommended to double the grace period for debt repayment: when purchasing breeding bulls:

■ replenishment of working capital - no more than 24 months from the date of issue of each tranche;

■ acquisition of breeding stock - no more than 48 months from the date of issue of each tranche.

The main indicators of livestock farming and increasing the competitiveness in the field are related to the creation of a solid feed base.

Currently, the lack of feed is a serious problem for the development of animal husbandry, which becomes a brake in achieving the competitiveness of the industry [8]. The lack of a feed base, its lagging behind the development of animal husbandry is due to such reasons as the loss of a scientifically sound system of feed production, low level of state support for the industry, lack of seed production, unattractiveness of the livestock industry, low labor productivity, lack of innovative attractiveness, prevalence in the structure of household production, where there is no modern technology and progressive production technology, neither product quality, etc.

State support is also the patronage of agricultural producers, and it is used not only as a tactical device, but also as a strategic resource that allows solving priority, promising tasks of the development of the agricultural sector, including eliminating unemployment in rural areas, increasing wages, creating new jobs, developing social and engineering infrastructure [9-11].

The system of state regulation and support should be built according to targeted programs in order to take into account regional peculiarities, stimulate priority areas of production development, form new organizational and legal forms of management, exclude non-production costs [12-13].

Conclusion

1. Effective state support for business structures in agriculture and personal subsidiary farms should be targeted and complex multi-level (state, regional, local level). The funds allocated within the framework of the State Program for the Development of Agriculture and the Regulation of Agricultural Products, raw materials and food markets should be directed to the implementation and support of economically significant agricultural development programs [14-15].

2. Subsidies to agro-industrial enterprises should be affordable and transparent.

3. In order to increase milk production, the share of the industrial type of livestock reproduction should be consistently expanded.

4. One of the important and effective economic tools for supporting and assisting entrepreneurship activities in the agro-industrial complex is the creation of large regional investment and innovation centers based on public-private partnership.

5. Low availability of feed remains an urgent problem. For example, with a feed standard for 1 head of cattle of 25-28 kg. units, the actual consumption was 9.6 kg. units, that is, the provision of feed was in the range of 35-38%.

6. Currently, the efficiency of feedlots in many places is low, especially large ones. One of the reasons is the underloading of feedlots, which is expressed in the unwillingness of producers to sell cattle for final fattening due to the low purchase price. Properly established relationships based on estimated prices between commodity farms and feedlots are of great importance in improving livestock supply systems. The estimated cost should be calculated at the regional level, including the average cost of young animals in reproductive farms and a certain level of profitability.

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