

FOOD EXPORTS IN THE REPUBLIC OF KAZAKHSTAN: INCREASING VOLUMES AND STRENGTHENING POSITIONS

ҚАЗАҚСТАН РЕСПУБЛИКАСЫНДАҒЫ АЗЫҚ-ТҮЛІК ЭКСПОРТЫ: КӨЛЕМДЕРДІ ҰЛҒАЙТУ ЖӘНЕ ПОЗИЦИЯЛАРДЫ НЫҒАЙТУ

ЭКСПОРТ ПРОДОВОЛЬСТВИЯ В РЕСПУБЛИКЕ КАЗАХСТАН: НАРАЩИВАНИЕ ОБЪЕМОВ И УКРЕПЛЕНИЕ ПОЗИЦИЙ

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Abstract. Kazakhstan's unique geopolitical landscape positions it as important supplier of agri-food products to international markets. This sector plays vital role in the country's export earnings. As global economy develops and modern standards become more stringent, assessing export potential of agro-industrial complex is becoming increasingly important. *The goal* is to study the prospects and strategies for increasing export potential of the republic's agricultural sector through comprehensive analysis of internal and external factors shaping this industry. The research methods are based on analysis of the works of scientists and the use of United Nations data. *Results* - modern strategies are summarized and practical recommendations are developed. The article examines the reserves and conceptual approaches to increasing food exports of the Republic of Kazakhstan by identifying key criteria influencing strengthening of this vital product segment. Assessment of existing practices is given, as well as proposals for their implementation. The article shows possibilities of increasing the volume of exported agricultural and food products to improve the competitiveness of national agro-food system. Method for calculating universal indicators reflecting structural shifts in agro-industrial production is presented. *Conclusions* - there is insufficient diversification of supplies of Kazakhstani food products and this trend has been maintained for a long time. In addition, analysis of dynamics of the level of structural shifts in Kazakhstan's foreign trade demonstrated stabilization of organizational mechanism for regulating domestic agro-food exports, strengthening its specialization and concentration. Nevertheless, significant part of exported goods consists of agricultural raw materials, which negatively affects prospects of agro-food trade policy.

Аңдатпа. Қазақстанның бірегей геосаяси ландшафты оны халықаралық нарықтарға аграрлық азық-түлік өнімдерінің маңызды жеткізушісі ретінде көрсетеді. Бұл сектор елдің экспорттық түсімдерінде маңызды рөл атқарады. Әлемдік экономика дамып, заманауи стандарттар қатайған сайын агроөнеркәсіптік кешеннің экспорттық әлеуетін бағалау маңызды бола түсуде. *Мақсаты* - осы саланы қалыптастыратын ішкі және сыртқы факторларды жан-жақты талдау арқылы республиканың аграрлық саласының экспорттық әлеуетін арттырудың перспективалары мен стратегияларын зерделеу. Зерттеу *әдістері* ғалымдардың еңбектерін талдауға және Біріккен Ұлттар Ұйымының деректерін пайдалануға негізделген. *Нәтижелері* - заманауи стратегиялар жинақталып, практикалық ұсыныстар жасалды. Мақалада осы өмірлік маңызды азық-түлік сегментін нығайтуға әсер ететін негізгі критерийлерді айқындау арқылы

Қазақстан Республикасының азық-түлік экспортын ұлғайтудың резервтері мен тұжырымдамалық тәсілдері қарастырылады. Қолданыстағы тәжірибелерді бағалау, сондай-ақ оларды іске асыру бойынша ұсыныстар берілді. Ұлттық агроазық-түлік жүйесінің бәсекеге қабілеттілігін арттыру үшін экспортталатын ауыл шаруашылығы және азық-түлік өнімдері көлемінің өсу мүмкіндіктері көрсетілген. Агроөнеркәсіптік өндірістегі құрылымдық өзгерістерді көрсететін әмбебап көрсеткіштерді есептеу әдісі ұсынылған. *Қорытынды* - қазақстандық азық-түлік өнімдерін жеткізуді әртараптандырудың жеткіліксіздігі байқалады және бұл үрдіс ұзақ уақыт бойы сақталып келеді. Бұдан басқа, Қазақстанның сыртқы саудасындағы құрылымдық өзгерістер деңгейінің серпінін талдау отандық агроазық-түлік экспортын реттеудің ұйымдастырушылық тетігінің тұрақтануын, оның мамандануы мен шоғырлануының күшеюін көрсетті. Алайда экспортталатын тауарлардың едәуір бөлігін ауыл шаруашылығы шикізаты құрайды, бұл агроазық-түлік сауда саясатының перспективаларына кері әсерін тигізеді.

Аннотация. Уникальный геополитический ландшафт Казахстана позиционирует его как важного поставщика агропродовольственной продукции на международные рынки. Этот сектор играет жизненно важную роль в экспортных поступлениях страны. По мере развития мирового хозяйства и ужесточения современных стандартов оценка экспортного потенциала агропромышленного комплекса становится все более важной. *Цель* - изучение перспектив и стратегий повышения экспортного потенциала аграрной сферы республики посредством всестороннего анализа внутренних и внешних факторов, формирующих эту отрасль. *Методы* исследования основываются на анализе трудов ученых и использовании данных Организации Объединенных Наций. *Результаты* - обобщены современные стратегии и разработаны практические рекомендации. В статье рассматриваются резервы и концептуальные подходы к увеличению экспорта продовольствия Республики Казахстан путем определения ключевых критериев, влияющих на укрепление этого жизненно важного продуктового сегмента. Даны оценка существующих практик, а также предложения по их реализации. Показаны возможности роста объемов экспортируемых сельскохозяйственных и пищевых продуктов для повышения конкурентоспособности национальной агропродовольственной системы. Представлен метод расчета универсальных показателей, отражающих структурные сдвиги в агропромышленном производстве. *Выводы* – отмечается недостаточная диверсификация поставок казахстанских продовольственной продукции и эта тенденция сохраняется на протяжении длительного времени. Кроме того, анализ динамики уровня структурных сдвигов во внешней торговле Казахстана продемонстрировал стабилизацию организационного механизма регулирования отечественного агропродовольственного экспорта, усиление его специализации и концентрации. Тем не менее, значительная часть экспортируемых товаров состоит из сельскохозяйственного сырья, что негативно сказывается на перспективах агропродовольственной торговой политики.

Keywords: agro-industrial complex, food industry, export diversification, export potential, logistics, foreign markets, government support, product competitiveness.

Түйінді сөздер: агроөнеркәсіптік кешен, тамақ өнеркәсібі, экспортты әртараптандыру, экспорттық әлеует, логистика, шетелдік нарықтар, мемлекеттік қолдау, өнімнің бәсекеге қабілеттілігі.

Ключевые слова: агропромышленный комплекс, пищевая промышленность, диверсификация экспорта, экспортный потенциал, логистика, зарубежные рынки, государственная поддержка, конкурентоспособность продукции.

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Introduction

Kazakhstan's agrofood sector is poised for significant growth in export development, given its abundant natural resources and the increasing global demand for environmentally friendly products. Country boasts vast agricultural land and favorable climatic conditions, allowing for a diverse range of crop cultivation. Key exports include grains like wheat and barley, oilseeds such as sunflower and rapeseed, and various livestock products. The nation ranks among the

world's leading wheat producers, with strong export capabilities in this segment (German-Kazakh agrarian-political dialogue) [1].

Agrofood sector not only provides essential employment and supports the domestic food balance, but also plays a vital role in the country's export revenues. As global markets evolve and international standards tighten, assessing the agrofood sector's export potential becomes increasingly critical.

Kazakhstan's agrofood products stand out for their environmental purity, aligning perfectly with the rising global demand for organic and natural foods. This unique advantage positions Kazakhstan favorably in Central Asia, CIS countries, and China.

Despite its significant potential and competitive advantages, Kazakhstan's agriculture is currently growing at a very slow pace. In neighboring countries, the share of agriculture in GDP is several times higher than in Kazakhstan (figure 1).

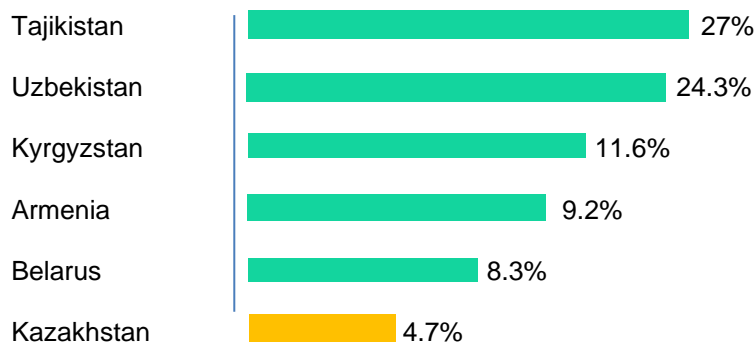
A significant barrier to Kazakhstan's agrofood sector's export potential lies in its transportation infrastructure. As a landlocked nation, accessing international markets is a challenge. It is crucial for Kazakhstan to modernize and expand its transportation network to enhance export growth, mainly through partnerships with neighboring countries like Russia and China.

The article assessed how international agreements and economic policy affect export

opportunities. Agriculture plays an important role in the economic and social development of Kazakhstan. In 2024, the sector's contribution to GDP was around 4.7%, and agriculture employed 1.2 million people, or 13% of the labor force. Although the sector's share in Kazakhstan's GDP is growing slowly, the sector remains important for generating income for the population.

Over the next four years, more than 50 investment projects around 300 billion tenge are plan to be implemented, which will ensure growth in the production of high value-added food products. Because of these plans, it will be possible to double the volume of food production, attract up to 1 trillion tenge of investment into the industry and significantly increase the country's export potential.

This Article also examines the impact of foreign economic relations on the export potential of Kazakhstan's agrofood sector and outlines the main directions and prospects for its development.



Note: based (The United Nations Data Portal) [2]

Figure 1 - The share of agriculture in the GDP of various countries in 2023

Literature Review

Since gaining independence, Kazakhstan, similar to other post-Soviet nations, has embarked on modernizing its economy and reforming various sectors. This era initiated a new phase in agricultural development, marked by the introduction of new ownership structures and business entities within the agro-industrial sector.

The "Concept of Development of the Agro-Industrial Complex of the Republic of Kazakhstan for 2021–2030" (referred to as the Concept of Agro-Industrial Development) outlines Task 5, which addresses "Reforming the Agro-Industrial Sector to Adapt to New Conditions" under National Priority 8, "Building a Diversified and Innovative Economy," within Kazakhstan's National Development Plan until 2025 (The concept of development of the agro-industrial...) [3].

These initiatives were approved by the Decree of the President of Kazakhstan on February 15, 2018, No. 636.

The government's "Nurly Zhol" program aims to enhance railway and road connectivity. Furthermore, projects like the "New Silk Road" provide new opportunities for exporting products to Europe and Asia, highlighting the necessity for improved logistics, green buildings and better storage solutions for perishable goods (Heba F.A., Husham H.A.) [4].

Despite the availability of various models for export diversification, there are limited overarching theories and frameworks pertaining to Kazakhstan's export potential. Researchers Aisautov D., Akimbekova G.U. [5] and Syzdykbayeva N.B., Turysbekova R.K., Asanova Z.I. et al. [6] have identified priority areas for developing the country's agro-industrial complex.

One of the most notable outcomes of the reforms has been the establishment of a multi-

structured agricultural economy, recognized as a strategic focus of agricultural policy.

However, these radical changes have not come without challenges, leading to a disruption of longstanding economic connections that has resulted in a crisis in the agricultural sector.

The report evaluates export potential of Kazakhstan through a comprehensive analysis of many governmental documents, as well as internal and external factors shaping this critical industry (Bureau of National Statistics of the Agency...; Baymukhamedova A.M., Aymurzinov M.S., Baymukhamedova G.S.) [7, 8].

Many authors mentions that in international agrifood trade very important factors, trends and main sub-groups, which were studied in the research Ibrasheva L.R. [9], as well as the impact of state and legal regulation on the sustainable development of agricultural territories and improving the standard of living of the population (Kalashnikov P., Kulanov A., Nesipbekov E. et al.) [10].

Materials and methods

During the research process the following methods were employed: expert assessments, analytical, economic-statistical, analysis and synthesis, comparative analysis.

The research's foundation comprises the works of domestic and foreign scholars on the development of international and regional trade and economic integration, as well as information materials from GATT and WTO (General Agreement on Tariffs and Trade, World Trade Organization), FAO (Food and Agriculture Organization of the United Nations), and EEC (Eurasian Economic Commission).

There were also guided interviews, case studies, and the study of secondary sources, including academic publications, reports, online articles, websites of international organizations and databases provided by them, and scientific and specialized literature related to the development of export potential.

The prediction of total consumption for key food items was developed using a series of econometric models. The demand for food from consumers largely depends on their income levels and the prices of the products. At the macro level, we estimate the population's income through GDP as a measure. This method assumes that the proportion of personal consumption relative to GDP stays constant during the forecast period, which is quite a significant assumption. Nevertheless, this discrepancy will be addressed when taking scenario forecasts into account.

Results

To effectively utilize these opportunities, strategies that strengthen the country's posi-

tion on the international stage must be developed and implemented. Below are the key areas and strategies for enhancing export potential.

The foundation for enhancing export potential lies in the urgent need for diversifying agricultural production. While Kazakhstan has traditionally exported grain, it is crucial to increase the production of other products, such as meat, dairy products, vegetables, and fruits. Diversification is not just a strategy, but a necessity to minimize risks associated with fluctuations in global market prices and adverse climatic conditions.

Diversification of agricultural production is a strategic process aimed at expanding the range of crops and products to enhance the resilience of the agricultural sector. This direction is particularly significant in Kazakhstan, as the country has long been focused on wheat exportation. However, diversification of production can play a crucial role in increasing export potential and reducing dependence on a single type of product.

Key Advantages of Diversifying Agricultural Production:

- risk reduction: Increasing the number of cultivated crops and produced goods helps decrease dependence on adverse weather conditions or market fluctuations related to a single crop. For example, in the event of falling global wheat prices, other products, such as meat or fruits, can compensate for losses;

- market expansion: Diversified products enable access to new markets where the demand for traditional Kazakh goods may be limited. For instance, global markets are showing an increasing demand for organic and environmentally friendly products, meat, dairy, and vegetables;

- increase in added value: Producing goods with higher added value, such as processed products (flour, dairy products, meat products), provides access to premium market segments. This allows for higher export revenues;

- development of Rural Areas: Diversification helps create new jobs and develop infrastructure in rural regions. Expanding agricultural production stimulates investment in product processing, transportation, and logistics infrastructure (Proskurnova K.Yu.) [11].

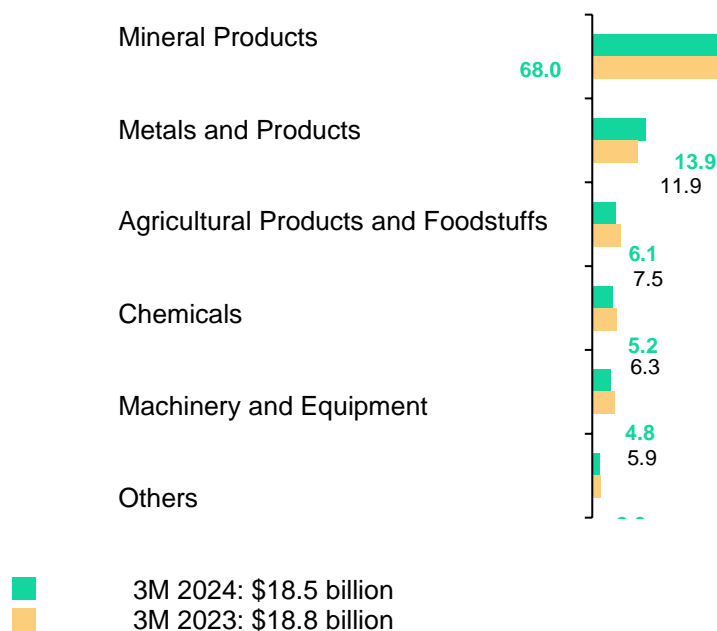
Examples of Successful Diversification: development of animal husbandry (particularly beef and lamb production, can become an essential direction for export, especially to countries in the Middle East and China, where the demand for meat is growing) vegetable and fruits production (Kazakh companies can

increase the production of vegetables, such as Almaty apples, potatoes, and tomatoes, which are in demand in domestic and international markets) and organic farming (Kazakhstan's agricultural lands are well-suited for growing organic products, which can attract the attention of consumers in Europe and Asia, where the demand for such products is consistently rising).

Thus, diversifying agricultural production is a crucial element of Kazakhstan's strategy to enhance its competitiveness in global markets.

Furthermore, Kazakhstan must not only export raw materials but also focus on processing agricultural products to increase added value. This may include the production of flour, meat, and dairy products, as well as other processed goods that have a higher value in international markets (figure 2).

Investing in processing technologies and establishing modern agro-industrial enterprises will help improve the competitiveness of Kazakh products.



Note: based (Bureau of National Statistics of the Agency...) [7]

Figure 2 - Structure of Exports by Main Commodity Groups, 2024, %

Kazakhstan needs to develop its infrastructure and logistics for more efficient exports as a country with a vast territory and limited access to the sea. This includes the construction and modernization of railway and road networks, as well as the establishment of specialized export terminals. Improving logistics and also transportation accessibility will reduce the delivery time and cost of products to huge export markets, which is especially important for perishable agriproducts with a short shelf life.

Effective logistics plays a key role in developing Kazakhstan's agrofood exports. Given the country's geographical position, which lacks access to the sea and features a large territory, improving logistical infrastructure becomes critically important for enhancing the agricultural sector's export potential (Van der Ploeg J.) [12].

Key Directions for Expanding Logistics Capabilities:

* modernization of transport infrastructure
Kazakhstan needs to actively modernize its

railway, road, and air transport networks to improve both domestic and international connectivity. This will reduce the delivery time of agricultural products to export markets: a) railways are crucial for the export of bulk agricultural goods, such as grain, to CIS countries and beyond; b) roads must be improved to ensure the quick delivery of perishable goods, such as fruits and vegetables, to nearby markets.

Development of multimodal transport routes utilizing multimodal routes, which combine different types of transport (road, rail, sea, and air), will allow Kazakhstan to become a logistics hub between Europe and Asia. This is especially important for delivering agricultural products to remote regions such as China, the Middle East, and Europe (Van der Kley D., Yao N.) [13];

* creation and modernization of export terminals to ensure the quick and efficient export of products, specialized terminals for agricultural exports must be built. This includes grain terminals, refrigerated warehouses for storing perishable products, and multimodal hubs at key points along transport corridors.

Development of border and customs points to expedite the export process and minimize delays, it is essential to develop border crossings, improve customs procedures, and implement digital technologies for faster cargo processing. This will reduce border crossing times and enhance the efficiency of export operations;

*investing in cold chain logistics for the export of perishable goods, such as meat, dairy products, fruits, and vegetables, a developed system of refrigerated transport and storage is necessary. Implementing a cold chain at all stages - from harvesting to market delivery -will help preserve product quality and reduce losses;

* improvement of connections with important ports and sea routes Kazakhstan is actively developing transit corridors through neighboring countries, such as China, Russia, Turkmenistan and Iran, to gain access to sea arteries. Cooperation with the ports of the Caspian Sea and Chinese ports in the southern part of the country provides access to global markets via rail and road routes;

*development of digital solutions for logistics implementing modern digital platforms and technologies, such as cargo tracking systems and online trading and logistics platforms, can significantly accelerate export processes and enhance the transparency of transport operations. This contributes to cost reduction and improves the timeliness of deliveries.

Examples of Successful Expansion of Logistics Capabilities:

●Trans-Caspian International Transport Route: this route allows for the delivery of Kazakhstani products to Europe via the Caspian Sea and Azerbaijan, bypassing traditional routes;

● "China-Kazakhstan-Europe" railway corridor reduces delivery times for agricultural products to European countries;

● expanding logistics capabilities is crucial to enhancing the competitiveness of Kazakhstan's agrofood exports. Developing infrastructure, improving transportation links, and implementing innovative solutions will help reduce delivery times, lower logistics costs, and improve the quality of exported products.

Agrofood products must comply with international quality and safety standards to access international markets. Therefore, it is necessary to develop and implement certification and standardization programs that meet the requirements of organizations such as the World Trade Organization (WTO) and the European Union. This will help Kazakhstani producers access new markets and increase foreign buyers' trust.

Certification and standardization are key factors for successfully entering international markets. In the agrofood sector of Kazakhstan, the adoption of international quality and safety standards is essential, as it significantly influences competitiveness and the capacity to export to global markets.

Key directions for certification and standardization:

■ Kazakhstan must adhere to international quality standards for exporting agricultural products, including those established by the World Trade Organization (WTO) and requirements set by the European Union and other trading partners. A key food safety standard is HACCP (Hazard Analysis and Critical Control Points), which ensures product safety throughout all stages of production and logistics. Additionally, standards developed by international organizations, such as ISO 22 000 (Food Safety Management System) and Global G.A.P. (standards for sustainable agriculture), are also essential for ensuring quality and safety (Guide to the Project Management....) [14];

■ certification of organic products is very important. The demand for organic products is continuously growing, especially in Europe and Asia. With its natural conditions and extensive land resources, Kazakhstan has the potential to develop organic farming. Certifying products as organic will allow Kazakhstani producers to enter premium market segments, ensuring high prices and stable demand. Certification of organic product must comply with global standards, such as EU Organic or USDA Organic, which gives total access to large markets;

■ compliance with phytosanitary requirements means that agricultural export products must meet the phytosanitary norms of importing countries, particularly regarding the absence of harmful organisms and pesticides. Kazakhstan must strengthen product quality control and compliance with phytosanitary requirements to prevent border refusals and product returns. Special attention should be paid to monitoring the use of chemical fertilizers and pesticides and ensuring sanitary standards in production and storage processes (Karymsakova Zh.K., Kerimova U.K., Yosini Deliana) [15];

■ ensuring food safety also very important. A crucial aspect of certification is ensuring food safety, which involves monitoring quality and testing for harmful substances such as heavy metals, mycotoxins, and bacteria. This necessitates the establishment of laboratory centers equipped with modern technology capable of conducting all required tests and issuing the appropriate certificates;

■ nowadays national standards and harmonization it is a must. Improving, developing

national quality standards for agroproducts that are harmonized with international ones is a vital step towards increasing export. Kazakhstan must implement and adapt international standards to its conditions and establish nationally recognized certification systems (Uspambayeva M., Zeinelgabdin A., Turebekova B. et al.) [16];

■ important to develop a network of certification centers that are internationally recognized and can certify products according to world standards. This will simplify the process for Kazakhstani producers to access international markets and minimize costs associated with certification abroad;

■ and the last is the traceability of products, which means modern markets demand complete transparency in the supply chain from producer to end consumer. Tracking the origin of products, production conditions, and compliance with standards at all stages – means traceability. Implementing digital solutions for product traceability will help increase consumer trust and meet international requirements.

Discussions

The Kazakh quality certificate Halal is essential for exporting meat products to Muslim countries, such as the Middle East and South-east Asia.

Implementing Global G.A.P. standards are necessary for exporting fruits and vegetables to European countries, where this standard is mandatory for market entry.

Certification and standardization of products are vital elements in enhancing Kazakhstan's agrofood sector's export potential. By implementing international quality standards, ensuring product safety, complying with phytosanitary norms, and developing certification centers, Kazakhstani producers will be better equipped to compete in global markets and achieve sustainable export growth.

While traditional export destinations for Kazakhstan remain the CIS countries, particularly Russia and China, it is essential to diversify export markets (Gong M., Xi R., Qi Y. et al.) [17]. Africa, Middle East and Asia - are emerging as promising regions for selling agriproducts due to population growth and especially demand for quality food items.

Developing effective marketing strategies and annual participating in international exhibitions, fairs will help increase the visibility of KZ products globally.

Creating modern cooperatives will allow SME to pool resources to improve their products quality and increase production volumes. Cooperatives can become crucial elements in enhancing the competitiveness of Kazakhstan's agro-industrial complex and facilitating

access to innovative technologies and modern agricultural practices.

Government support is a vital element for developing the agrofood export sector. Subsidy programs, favorable loan provisions, and tax incentives are necessary to stimulate exports. Moreover, the government can assist producers in promoting their products in international markets through diplomatic channels and trade representations.

Using modern technologies like digital trading platforms, automated production processes, and precision agriculture can greatly improve the efficiency of the agricultural sector. These innovations enhance product quality, reduce costs, and allow for more accurate predictions of harvests, ultimately increasing export potential.

Despite notable achievements, Kazakhstan's agrofood sector faces challenges that need addressing to maximize export potential. Key recommendations include:

First, product diversification: shifting focus to value-added products such as processed foods and organic items will help reduce reliance on raw commodity exports.

Second, enhancing quality standards: meeting global standards through rigorous certification processes will open huge markets, especially in Asian countries.

Third, expanding market access: actively pursuing markets in the Middle East and Southeast Asia can leverage growing food demand in these vast regions.

Fourth, environmental sustainability: developing "green agricultural practices" will align with global trends toward sustainability, meeting the demand for popular in the World organic products.

Conclusion

1. Kazakhstan has the potential to become one of the world's leading exporters of agricultural and food products. To realize this potential, it is essential to focus on diversifying products, improving infrastructure, implementing modern technology, and promoting products in new markets. Coordinated government and private sector efforts will help strengthen Kazakhstan's position in global markets and ensure sustainable growth in agrofood exports.

2. Kazakhstan's agrofood sector is ripe with export potential, fueled by natural resources and government backing. With strategic initiatives, Kazakhstan can solidify its place as a key player in global food markets, enhancing its economy and international standing.

3. However, addressing infrastructure challenges, boosting product processing, and adhering to international quality standards are essential steps for unlocking this potential.

4. Implementing all strategic plans will provide possibility to double the volume of food production, attract up to 1 trillion tenge of investment into the industry and significantly increase the country's export potential.

5. Despite the current challenges, in the long term, high quality products of Kazakhstan have all chances to expand to a significant markets of China, EU, Middle East and South-east Asia.

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