

RESOURCE POTENTIAL AND DEVELOPMENT PROSPECTS
OF PROCESSING ENTERPRISES OF AIC IN ALMATY REGION

АЛМАТЫ ОБЛЫСЫНЫҢ АӨК ҚАЙТА ӨНДЕУ КӘСІПОРЫНДАРЫНЫҢ
РЕСУРСТЫҚ ӘЛЕУЕТІ ЖӘНЕ ДАМУ БОЛАШАҒЫ

РЕСУРСНЫЙ ПОТЕНЦИАЛ И ПЕРСПЕКТИВЫ РАЗВИТИЯ
ПЕРЕРАБАТЫВАЮЩИХ ПРЕДПРИЯТИЙ АПК АЛМАТИНСКОЙ ОБЛАСТИ

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Abstract. The relevance and priority of the development of processing agricultural products and increasing its export potential are justified. The current state of the areas of production and processing of agricultural products of Almaty regionis analyzed. An assessment of the potential of processing enterprises in the main branches of the AIC of the region (dairy, meat, sugar-beet, oil and fat, etc.) is presented. The activity of the processing industry has been analyzed, the features and trends in the development of the raw material base and production capacities of the processing enterprises have been determined. The problems constraining their developmenthave been revealed: concentration of



production in the households of the population, the unsatisfactory quality of raw materials; seasonal character and its uneven flow to processing enterprises during the year, the lack of interaction between agricultural producers, processing industry and trade. The authors note that wholesale distribution centers are becoming particularly important, the main task of which should be the availability of marketing of agricultural products by producers of any form of business. Difficult conditions of marketing activity, especially for small businesses, lead to the need for cooperation and establishing of logistics centers in order to bring together the efforts of all agricultural producers and provide consumers with competitive products in one flow of goods.

Аңдатпа. Ауыл шаруашылығы өнімдерін қайта өңдеуді дамытудың өзектілігі мен басымдылығы және оның экспорттық әлеуетін арттыру негізделген. Алматы облысының ауыл шаруашылығы өнімдерін өндіру және қайта өңдеу салаларының қазіргі жай-күйіне талдау жүргізілген. Облыстың АӨК негізгі салаларында (сүт, ет, қызылша, май және т.б.) қайта өңдеу кәсіпорындарының әлеуетіне баға берілді. Қайта өңдеу өнеркәсібінің қызметі талданды, шикізат базасын, қайта өңдеу бойынша кәсіпорындардың өндірістік қуаттарының ерекшеліктері мен даму беталыстары анықталды. Олардың дамуын тежейтін проблемалар анықталды: халық шаруашылықтарына өндірістің шоғырлануы, шикізаттың қанағаттанарлықсыз сапасы; маусымдылығы және оның бір жылы ішінде қайта өңдеу кәсіпорындарына біркелкі түспеуі, ауыл шаруашылығы тауар өндірушілері, қайта өңдеу өнеркәсібі мен сауда арасындағы өзара байланыстың болмауы. Авторлар атап өткендей, көтерме-тарату орталықтары ерекше өзектілікке ие болуда, олардың басты міндеті шаруашылық жүргізудің кез келген нысанындағы тауар өндірушілердің ауыл шаруашылығы өнімдерін өткізуге қол жетімділігі болуы тиіс. Өткізу қызметінің күрделі жағдайлары, әсіресе шаруашылық жүргізудің шағын нысандары үшін бір тауар ағымында барлық ауыл шаруашылығы тауарын өндірушілердің күш-жігерін жақындастыру және тұтынушыларды бәсекеге қабілетті өніммен қамтамасыз ету мақсатында кооперация мен логистикалық орталықтар құру қажеттілігіне алып келеді.

Аннотация. Обоснованы актуальность и приоритетность развития переработки сельскохозяйственной продукции и повышение ее экспортного потенциала. Проведен анализ современного состояния сфер производства и переработки сельхозпродукции Алматинской области. Дана оценка потенциала перерабатывающих предприятий в основных отраслях АПК области (молочной, мясной, свеклосахарной, масложировой и др.). Проанализирована деятельность перерабатывающей промышленности, определены особенности и тенденции развития сырьевой базы, производственных мощностей предприятий по переработке. Выявлены проблемы, сдерживающие их развитие: концентрация производства в хозяйствах населения, неудовлетворительное качество сырья; сезонность и неравномерное поступление его на перерабатывающие предприятия в течение года, отсутствие взаимосвязи между сельхозтоваропроизводителями, перерабатывающей промышленностью и торговлей. Авторы отмечают, что особую актуальность приобретают оптово-распределительные центры, главной задачей которых должна стать доступность сбыта сельскохозяйственной продукции товаропроизводителями любых форм хозяйствования. Сложные условия сбытовой деятельности, особенно для малых форм хозяйствования, приводят к необходимости кооперации и создания логистических центров с целью сближения в одном товаропотоке усилий всех сельхозтоваропроизводителей и обеспечения потребителей конкурентоспособной продукцией.

Key words: agro-industrial complex, agricultural products, production, processing enterprises, production capacity, resource potential, labor productivity, export.

Түйінді сөздер: агроөнеркәсіптік кешен, ауыл шаруашылығы өнімдері, өндіріс, қайта өңдеу кәсіпорындары, өндірістік қуаттар, ресурстық әлеует, еңбек өнімділігі, экспорт.

Ключевые слова: агропромышленный комплекс, сельскохозяйственная продукция, производство, перерабатывающие предприятия, производственные мощности, ресурсный потенциал, производительность труда, экспорт.

Introduction. One of the priorities of agro-industrial complex of the Republic is the development of processing of agricultural products. This is confirmed by the implementation of the objectives of the State program on the development of agro-industrial complex

of the Republic of Kazakhstan for 2017-2021 (hereinafter the Program) [1], Strategy "Kazakhstan - 2050": a new political course of the sustainable State [2] etc.

Almaty region has a significant resource potential for processing agricultural products



of the Republic of Kazakhstan, which has sufficient production capacity of agricultural processing enterprises. Following the results of 2017, positive dynamics exists in all sectors of economy, in industry the growth was 4.3% and the volume exceeded 700 bln tenge [3].

In Almaty region, operate more than 1800 enterprises, 20 of them with participation of transnational companies, global brands - anchor investors, they produce almost a third of all industrial products. The share of processing sector reached 85%, this is one of the highest rates in the republic [4].

The main reasons for the high share of food imports on market are: insufficient growth rates of domestic agricultural production and processed products, low quality of produced raw materials that do not meet the requirements of industrial processing, non-utilization of production capacities of processing enterprises [5]. The existing problems of the processing industry of the AIC RK, including Almaty region, justify the need to study the factors hindering its development, the development of proposals for their solution.

Material and methods of research. In the process of preparing the article, various methods of economic research were used: economic and statistical - in analyzing and assessing the current state of development potential of processing enterprises of the AIC RK and Almaty region; their production capacity, raw materials zones, including data analysis from specific sectors of agricultural sector of the region; abstract-logical - when identifying sectoral and regional characteristics of the existing forms of interaction between producers and processors of agricultural products, as well as identifying factors affecting the efficient economic relations between agricultural producers and processors.

Addressing the problems of production, processing and marketing of agricultural products, in particular in dairy and meat industries, contributes to the efficient functioning and interaction of agricultural, processing and service providing enterprises of the AIC and promotion of food products from raw materials to finished products along the processing chain.

Information base of the research – materials of the State programs of the Republic of Kazakhstan, data of the Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan, the official website of the Ministry of Agriculture of the Republic of Kazakhstan, Government of Almaty Region, etc.

Results and its discussion. The diversified nature of production is the specific feature of agro-industrial complex of Almaty region, where dairy, meat, horticulture, sugar beet, oil and fat and other branches of AIC have developed. For the development of a system of processing agricultural products, the region has an appropriate raw material basis and production facilities.

For 2013-2017, in the region, the area under crops was expanded by 4.7% and reached 953.6 thous. ha, grain crops (47%), forage (26%), oilseeds (18%) occupy a high proportion in the structure of crops. Crop diversification was done: in 2018 wheat sown areas were reduced from 167.8 to 125.8 thous. ha, oilseed crops were expanded from 160 to 171.2 thous. ha, potatoes - from 73.2 to 76.3 thous. ha, fodder crops - from 228 to 474.5 thous. ha. According to the results of harvesting crops in the region, 1339.6 thous. tons (in the initially received weight) grain and leguminous crops were produced, rice - 48.9, sugar beet - 270.9, oilseeds - 293.3, potatoes - 722.0, vegetables - 951.3, fruits and berries - 94.5, grapes - 19.6 thous. tons. [6].

Production volumes of processed products increased 1.2 times. Despite this, the share of processing in the total volume of production remains low. Thus, of 211.7 thous. tons of produced meat, only 77.6 thous. tons were processed, or 36.6%, out of 723.4 thous. tons of raw milk - 203.1 thous. tons processed, or 28.1%, respectively, of seed oil - of 293.3 thous. tons 40.6 thous. tons processed, or 13.8%, of vegetables – of 951.3 thous. tons 91.1 thous. tons, or 9.6%. Production capacity at processing plants was 69.7% for milk, 55.1% for meat, 16% for seed oil, and 49.7% for vegetables (table 1) [see 6; 7; 8].

Table 1 - The main indicators of production and processing of agricultural products in Almaty region in 2017

Type of product	Production, thous.t.	Production capacity, thous.t.		Processed raw materials, t/year	Share of procession, %	Load, %
		on raw materials	on finished products			
Milk	723,4	291,3	215,8	203,1	28,1	69,7
Meat	211,7	140,9	114,6	77,6	36,6	55,1
Seed oil	293,3	254,0	63,5	40,6	13,8	16
Vegetables	951,3	183,1	106,0	91,1	9,6	49,7

Аграрная политика: механизм реализации

In 2017, exports of agricultural products in Almaty region amounted to 65.1 mln. USD, incl. flour exports - 21.8 mln. USD, fish and fish products - 16.9 mln. USD, etc. 156 enterprises are included in the exporters register. The main importers of the regional products are: Afghanistan - 9.5%, China - 4.9%, countries of the EAEU (Kyrgyzstan,

Russia, Belarus) - 4.5%, Uzbekistan - 2.6%. The main types and volumes of exports of processed products of Almaty region are presented in table 2. In the coming years, Almaty region plans to increase the volume of exports of processed agricultural products 2.5 times.

Table 2 - The volume of exports of processed products of AIC in Almaty region for 2017 and forecast for 2022

Type of product	Export volume, mln. USD	
	2017	2022
Wheat flour and flour products	21,8	42,2
Fish products	16,9	33,8
Fresh fruits and vegetables	11,1	42,2
Malt, Starch	7,2	18
Oilseeds	6	21,2
Poultry egg	2,1	5,3

According to the Concept of the implementation of the Regional Program on AIC Development of Almaty Region, increase of labor productivity in agriculture is planned from 1,534 thous. tenge in 2017 to 3,834 thous. tenge in 2022, and the increase in gross agricultural output from 647.6 bln tenge in 2017 to 923.1 bln tenge in 2022, as well as the growth in exports of processed agricultural products from 65.1 mln USD in 2017 to 162.7 mln USD in 2022 [7].

The main priorities for the development of AIC of Almaty region are beef and dairy cattle production, sheep production, greenhouses, horticulture, potato, beet growing, as well as the development of agricultural processing system in these sectors.

So, in order to develop beef cattle production, an active work on the development of feedlots is currently being carried out in the region. In 2017, there were 14 feedlots for 40 thous. heads. The main suppliers of young cattle for these feedlots - 1,146 peasant farms. A significant concentration of peasant farms around the feedlots was formed in Zhambyl (279 farms with 6,350 heads of cattle), Balkhash (220 farms - 5,253 heads of cattle), Panfilovsky districts (148 farms - 2,897 heads of cattle) of Almaty region.

In the future (by 2027) it is planned to build 6 new feedlots for 18 thous. heads of cattle in Panfilov, Aksu, Uygur, Ili and Enbekshikazakh districts for 3 thous. heads in each. For the development of meat processing system, it is planned to increase the capacity utilization of the processing enterprises of the industry to 97% and to

achieve the volume of processed meat 136.7 thousand tons.

Currently for the development of dairy cattle in the region there are 68 dairy farms for 16 thous. heads and it is planned to create 149 such farms for 37,000 heads by 2027. So, if in 2017, 78% of milk was produced by households, 12% by peasant farms which have 50 heads, and only 10% of milk by large specialized enterprises in the form of dairy farms, then in 2027 it is planned to increase the share of large producers, in particular dairy farms to 25%, the share of peasant farms should be 22% and, accordingly, reduce the proportion of households to 53%.

As a result, the growth of raw milk production will increase 1.4 times, or 1015.9 thous. tons. Respectively, the workload of dairy enterprises of the region and the volume of milk processing will increase - 290.8 thous. tons, that is, the processing share will increase by 35%.

The main producers of oilseeds in Almaty region are 2,464 agricultural enterprises with an area of 171 thous. ha. Agricultural producers of Alakol (534 farms with an area of 36.2 thous. ha), Sarkand (387 farms - 35.3 thous. ha), and Aksu (347 farms - 15.3 thous. ha) districts have the largest areas for oilseeds. There are five large oil seed processing plants with a total capacity of 167.5 thous. tons and 17 small workshops for 29.7 thous. tons in the region. In the future, it is planned to build two plants with capacity of 39 thous. tons, in Eskeldi district for 3 thous. tons and Alakol district for 36 thous. tons [7].

One of the priorities for the development of processing of agricultural products in

Almaty region is the revival of domestic sugar beet production. There are 2 sugar refineries operating in the region (Aksu Kant with production capacity of 350 thous. tons/ year and Koksu Sugar Factory with a capacity of 180 thous. tons/ year), starting from 2021, it is planned to open Alakol Sugar Factory for 240 thous. tons/ year. It is planned to expand the area for sugar beet 1.4 times by 2022 and 1.8 times by 2027, thereby increase the volume of acceptance of raw materials for sugar factories to 500 thous. tons by 2022. At the same time, the output of sugar will increase 1.4 times and reach the figure of 58 thous. tons versus 35.4 thous. tons, the utilization rate of production capacity of sugar factories in 2017 was equal to 86%, by 2022 it will be 100%.

Taking into account the availability of raw material basis and potential capabilities of existing enterprises for processing agricultural products of Almaty region, it is planned to construct 27 new processing enterprises: for milk - 4, meat - 8, wool and skins - 1, oilseeds - 2, mixed feeds - 4, cereals-1, potatoes - 1, processing of fruits and vegetables - 6. Also by 2020, modernization of 12 operating processing enterprises is planned [7].

Conclusions.

1. Analysis of the current state of agricultural products processing system in Almaty region indicates a sufficient resource potential and growth possibilities for production of processed finished agricultural products that covers the needs of the region's population for the main types of food and export it to the domestic and foreign markets.

2. Despite the existing potential of agricultural enterprises of the region, it is necessary to solve the problems of a significant proportion of households in the production of livestock products (milk, meat, etc.), the underdeveloped system of storage, processing and marketing of agricultural products, transportation of products to the sales and distribution network, low load of production capacities of processing enterprises, low quality of supplied agricultural raw materials.

3. Taking into account the specifics of the southern region, which is characterized by small-scale agricultural production, the issue of high proportion of households in total agricultural production can be solved by co-operating small business forms and creating marketing, processing, supply and other cooperatives. This process will solve the problem of low quality raw materials that do not meet the requirements of industrial

processing, and will also contribute to the workload of production capacities of processing enterprises.

4. In order to solve the issues of sales of manufactured agricultural products and their further storage, processing and delivery to the consumer, it is advisable to create wholesale distribution centers (WDC) in each district of Almaty region. The main advantages of the formation of regional wholesale distribution centers include:

- ♦ reduction of logistics costs, direct delivery of products from agricultural producers to the WDC;
- ♦ reduction of product losses due to storage in high-quality warehouses with required temperature;
- ♦ availability of services for product refinement, pre-sale packaging, etc.;
- ♦ optimization of the supply chain of agricultural products from producer to consumer without intermediaries.

5. The formation of effective forms of interaction of agricultural producers with the system of processing products in the form of agricultural cooperatives, wholesale distribution centers will increase the competitiveness of domestic products, labor productivity in AIC and export potential of enterprises of agro-industrial complex of Almaty region and the Republic of Kazakhstan as a whole.

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