

ТЕНДЕНЦИИ РАЗВИТИЯ АГРОПРОМЫШЛЕННОГО КОМПЛЕКСА РЕСПУБЛИКИ КАЗАХСТАН

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Аңдатпа. 2018 жылғы және 2019 жылдың бірінші жарты жылдығы кезеңіне Қазақстанның ауыл шаруашылығы өндірісінің дамуына талдау жасалды. Республиканың агроөнеркәсіптік кешенінің ағымдағы жағдайы мен мәселелері зерттелген. Тағам өндірісін өсірудің мәселелі нүктелері анықталды. Ауыл шаруашылығын мемлекеттік қолдаудың жаңа тетіктері көрсетілді. Жалпы өнім шығарудың оң динамикасы, отандық өндіріске шетелдік инвестици-

ялардың өсуі және жаңа ауыл шаруашылығы объектілерінің қалыптасуы анықталды. 2011-2018 жж. және 2019 ж. бірінші жарты жылдығында тірі салмақтағы ауыл шаруашылығы жануарлары үшін дайын жем өндіру серпіні талданды. 2019 жылдың басына мал басының түрлері бойынша үлестік бөліну қарастырылды. Қазіргі заманғы АӨК тиімді мемлекеттік реттеу тетігі, елдің азық-түлік қауіпсіздігін қамтамасыз ету бағыттары қаралған. Республиканың аграрлық секторын реформалау тәжірибесіне авторлық баға берілген. Агроөнеркәсіптік кластерлерді мемлекеттік қолдауды, оларды ұйымдастыру кезінде басқару шешімдерінің тиімділігін арттыру бойынша практикалық ұсынымдар әзірленген. Мынадай міндеттерді дәйекті шешу қажет: инвестицияларды тарту, өнім сапасын жақсарту, экологиялық таза тамақ өнімдері өндірісінің өсуі, өндіріс пен қайта өңдеу өнеркәсібі арасындағы баға теңсіздігін жою. Ауыл шаруашылығы өндірісін тұрақтандыру мақсатында бағаны реттеу шаралары көрсетілген. Аграрлық нарықтың шаруашылық субъектілерінің тиімді жұмыс істеуі жөнінде ұсынымдар берілген.

Аннотация. Дан анализ развития сельскохозяйственного производства Казахстана в период 2018 г. и 1 полугодие 2019 г. Исследованы текущее состояние и проблемы агропромышленного комплекса республики. Определены проблемные точки роста производства продовольствия. Показаны новые механизмы государственной поддержки сельского хозяйства. Выявлены положительная динамика валового выпуска продукции, рост иностранных инвестиций в отечественное производство и формирование новых сельскохозяйственных объектов. Проанализированы тенденции развития производства готовых кормов для сельскохозяйственных животных в натуральном выражении за 2011-2018 гг. и первое полугодие 2019 г. Представлено долевое распределение поголовья скота по видам на начало 2019 года. Рассмотрены механизмы эффективного государственного регулирования современного АПК, направления обеспечения продовольственной безопасности страны. Дана авторская оценка опыта реформирования аграрного сектора республики. Разработаны практические рекомендации по повышению государственной поддержки агропромышленных кластеров, эффективности управленческих решений при их организации. Обосновывается, что необходимо последовательное решение следующих задач: привлечение инвестиций, улучшение качества продукции, рост производства экологически чистых продуктов питания, устранение диспаритета цен между производством и перерабатывающей промышленностью. Продемонстрированы меры ценового регулирования в целях стабилизации сельскохозяйственного производства. Даны рекомендации по эффективному функционированию хозяйствующих субъектов аграрного рынка.

Key words: agro-industrial complex, food security, production, product quality, investments, agribusiness, export, feed, subsidies, clusters.

Түйінді сөздер: агроөнеркәсіптік кешен, азық-түлік қауіпсіздігі, өндіріс, сапа, өнім, инвестициялар, агробизнес, экспорт, мал азығы, субсидиялар, кластерлер.

Ключевые слова: агропромышленный комплекс, продовольственная безопасность, производство, качество продукции, инвестиции, агробизнес, экспорт, корма, субсидии, кластеры.

Introduction. One of the fundamental conditions for the viability of any state is agriculture, the successful implementation and management of which affects the stable functioning of the socio-economic development of society as a whole. The specificity of the situation that the agricultural sector occupies is determined, firstly, by the production of food for the population and the reproduction of labor, and secondly, by the production of raw materials for other sectors of the economy. Hence the conclusion that a high level of agricultural production definitely ensures the economic and food security of the country.

Agriculture is the main and most promising sector of the economy of Kazakhstan. According to the President of the

Republic of Kazakhstan N.A. Nazarbayev, - "The agricultural sector should become a new driver of the economy. The agro-industrial complex of Kazakhstan has a promising future. In many positions, we can be one of the world's largest producers of agricultural export products. Especially for the production of environmentally friendly food. The brand made in Kazakhstan should become the standard of such products" [1]. Few countries have an agricultural development potential comparable to the potential and significant reserves of Kazakhstan.

Of course, for the timely resolution of issues of the agro-industrial sector by the state, a set of measures is being taken to

improve it - funding is increasing, new programs are being developed, new mechanisms of state support are being formed. The natural conditions of Kazakhstan, their diversity determine significant potential opportunities for the development of animal husbandry. In the Republic, sheep, horse, camel and cattle breeding are traditionally practiced. The specialization of the functioning of the agro-industrial complex, ensuring food security requires the implementation of an agri-food policy, in which government regulation and state support should play a greater role than in other sectors of the economy.

Material and methods of research.

The article reflects use of statistical methods in agriculture. The analysis of the lack of information in the industry.

The long experience of statistical work convincingly shows that in agriculture traditional methods of statistics require serious modification. First of all, this is due to the specifics of the system of statistical indicators of the industry. In addition, it is necessary to take into account both the socio-economic and technical-economic features of agriculture and the reproduction processes taking place in it. The most notable feature of statistical observation in the industry is the variety of programs and the many forms used in gathering information. The study of theoretical material from sources (magazines, literature, Internet resources).

The methods of theoretical and practical photometry, mathematical modeling, methods of mathematical statistics are used.

In order to ensure the development of agriculture, it is necessary to create an effective economic mechanism of state regulation, including mutually beneficial formal methods and methods of influencing commodity producers in order to stimulate production, financial, investment activities and market saturation with competitive products.

Domestic scientists Kaliyev G.A, Bek-hozhaeva A. K., Kantarbaeva Sh.M., Espolov T.I. published scientific works, which are based on the formation of the agrarian policy of Kazakhstan; the development of cluster requirements increases the competitiveness of agricultural products [2, 3, 4, 5].

Results and their discussion. Kazakhstan has vast areas of agricultural land. The main sources of livestock and poultry in the republic are pastures, natural and sown hayfields, and arable land for growing fodder crops. The pasture area in the republic is 182.0 million hectares, natural and sown

hayfields - 4.8 million hectares, the area of arable land used for the production of fodder - 2.5 million hectares [6].

Over the past 5 years (2014-2019), the acreage of Kazakhstan has increased by 40%. Almost half (45.9%) of the acreage allocated for forage crops accounts for 3 regions of the country: Kostanay (18.4%), North Kazakhstan (17.5%) and Pavlodar (10%) regions. There are practically no cultivated areas for this type of culture in the Mangystau and Atyrau regions, as well as in the cities of Astana and Almaty.

At the same time, with the growth of acreage, there is an increase in the number of direct feed consumers, farm animals. For 5 years, the number of cattle has increased by 10%, the number of birds by 14%.

The average annual growth rate of the volume of finished animal feed in physical terms for the period 2018-2019 amounted to 16.3%.

The development of agricultural entrepreneurship in the country can change dramatically only if there is a reasonable government regulation of agriculture with the obligatory observance of the interests of agricultural producers. The logic of further economic transformation requires a transition to a new quality of growth in the agrarian sector, associated with the formation of a rational structure of agribusiness, an increase in the level of agricultural technologies, a transition to a marketing strategy for agricultural production, import substitution in the domestic market, and increased exports to neighboring countries and beyond.

The main task of the development of any industry indicator is the indicator that it receives in the gross domestic product the share and volume of products produced [7].

Each of the elements of the economic mechanism is characterized by features and relative independence, but the result of their interaction presupposes the solution of common tasks. The self-regulating functions of the market economic mechanism objectively imply state regulation of market processes, based on the laws and principles of a market economy, the need to eliminate unfair competition, and the role of this regulation increases during periods of reform.

Substantial economic support for producers should be created on the basis of implementation in the interests of producers of pricing, financial, credit, tax, insurance policies, by controlling the import of products into the republic and direct subsidies to the production and export of products.

Аграрная политика: механизм реализации

In 2018, the sown areas set aside for forage crops of the Republic of Kazakhstan amounted to 3,485.2 thousand hectares and decreased by 5.1% compared with previous year. However, it is worth noting that from 2018 there is a steady upward trend in the area under fodder crops.

Sown area of forage crops in the context of the regions of the Republic. Almost half (45.9%) of the acreage allocated for forage crops accounts for 3 regions of the country: Kostanay (18.4%), North Kazakhstan (17.5%) and Pavlodar (10%) regions. There are practically no cultivated areas for this type of culture in the Mangystau and Atyrau regions, as well as in the cities of Astana and Almaty.

Evaluating the market of ready-made feeds for farm animals, first of all, it is necessary to consider the development needs of this market, in particular, the number of main consumers of this type of product - farm animals.

The livestock of cattle, sheep, goats, pigs, horses, camels, poultry in Kazakhstan.

According to the Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan, the number of cattle at the beginning of 2019 was 6,247.2 thousand heads, pigs 831.1 thousand heads, sheep and goats - 17 947.2 thousand heads, horses 2 113.2 thousand heads, camels - 172.5 thousand heads, birds of all kinds - 37.8 million heads.

As of January 1, 2019, the number of cattle in all categories of farms increased compared with the beginning of 2018 by 1.02% and amounted to 6247.2 thousand heads, horses - by 2.1% and 2 113, respectively 2 thousand heads, camels - by 1.2% and 172.5 thousand heads, poultry - 6.2% and 37.8 million heads. The number of sheep and goats at the beginning of 2019 reduced to change the range of the data chart, drag the lower right corner of the range. 0.4% compared with the beginning of 2018 and amounted to 17 947.2 thousand heads, and pigs, respectively, 6, 4% (table) [8].

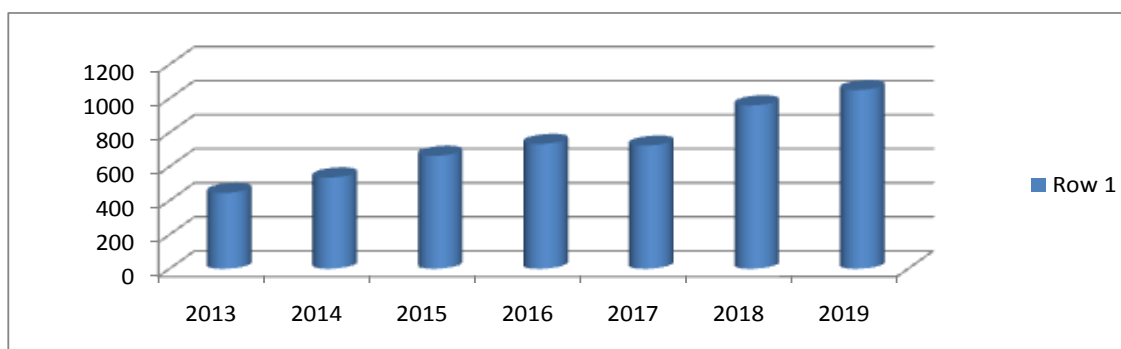
Table - Number of livestock in all categories of farms of the Republic of Kazakhstan as of January 1 (at the beginning of the year), thousand heads

Year	Cattle	Sheepandgoats	Pigs	Horses	Camels	Bird, millionheads
2014	5 702,4	18 091,9	1 204,2	1 607,4	173,2	32,9
2015	5 690,0	17 633,3	1 031,6	1 686,2	164,8	33,5
2016	5 851,2	17 560,6	922,3	1 784,5	160,9	34,2
2017	6 032,7	17 914,6	884,7	1 937,9	165,9	35,0
2018	6 183,9	18 015,5	887,6	2 070,3	170,5	35,6
2019	6 247,2	17 947,2	831,1	2 113,2	172,5	37,8

Source: Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan

It should be noted that more than half (58.1%) of livestock at the beginning of 2019 accounted for birds. Second place is occupied by the livestock of sheep and goats (27.6%), followed by cattle (9.6%), horses (3.2%), pigs (1.3%) and camels (0.3%) in descending order.

According to the Statistics Committee of the Ministry of National Economy of the Republic of Kazakhstan, in 2018, 960.0 thousand tons of finished animal feed was produced, which is 32.7% more than in the previous year and 2.2 times more than the 2014 production level (figure).



Source: Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan
Figure - Dynamics of production of finished feed for farm animals in physical terms in 2013-2019, thousand tg.

The average annual growth rate of the volume of finished animal feed in physical terms for the period 2013-2019 amounted to 16.3%.

Production of finished feed for farm animals in physical terms by region, kt.

It is worth noting that the largest increase in the production of the studied products in physical terms in 2018 relative to the level of previous year occurred in the Atyrau region - the production of feed increased more than 13 times (up to 2 thousand tons). Leading positions in the growth of output also occupy: Kyzylorda region (production increased 3.7 times), Zhambyl region (2.4 times) and Karaganda region (almost 2 times to the level of 309.7 thousand tons or 32.3 % of total output in the country in 2018).

A significant drop in feed production fell on the city of Astana (a decrease of 22.6% compared to the level of previous year) and in the West Kazakhstan region (in 2018, a decline of more than 16%). Production of the studied products in the Kostanay region decreased from 10.1 thousand tons in the previous year to 9.4 thousand tons in 2018 (a decline of 6.9%) [9].

Growth in agricultural production is noted in 14 regions. The highest growth is observed in Mangistau (by 8.2%), Pavlodar (by 6.7%), Zhambyl (by 5.5%) and Aktobe (by 5.3%) regions.

Last year, at the beginning of the year, 179 billion tenge was allocated to the development of the agro-industrial complex, which is only 3% more compared to 2017.

During the autumn budget refinement, we managed to allocate an additional 97.9 billion tenge from the budget, or half of the adopted budget for:

- ◆ livestock subsidies - 30.2 billion tenge;
- ◆ investment subsidies - 12.8 billion tenge;
- ◆ financing of KazAgro projects –51.7 billion tenge.

As a result, in 2018:

- the volume of subsidies amounted to 220 billion tenge, which is 26% more than in the previous year;
- the volume of concessional loans amounted to 233 billion tenge, which is 14% higher than the previous year.

Last year, almost 11 thousand microloans were issued, which is 34% more than the level of the previous year. The loan amount is 34 billion tenge, which is 8.4 billion tenge more

than in the previous year (in the previous year - 25.6 billion tenge).

Thanks to additional allocated funds, which we have laid the foundation for their large-scale development. As a result, 50 billion tenge was allocated to support agriculture.

At present, the development of integration processes in Kazakhstan is in its infancy, the existing economic relations between agricultural producers and processing enterprises do not always provide them with mutually beneficial participation.

Today, Kazakhstan occupies a leading position in terms of the volume of attracted foreign investment per capita among the CIS countries [10].

It is necessary to solve the following problems: attracting investment, improving product quality, increasing the production of environmentally friendly food products, eliminating the disparity of prices between production and processing industry, etc. it Should be noted that the development of the national agro-food market of the country depends on the activities of regional markets.

Conclusion.

1. In order to stabilize agriculture, it is advisable to implement the following price control measures:

- use the minimum guaranteed purchase prices for strategic agricultural raw materials, which are obligatory for producers and buyers, regardless of their form of ownership, at a level that provides producers with sufficient profitability of production and its expansion;
- use guaranteed prices when purchasing products for state and social needs;
- implement restrictions on the costs that form the cost of essential foods;
- apply regulatory trade margins for wholesalers and retailers in the sale of essential products.

2. It is advisable to create a special State Price Support Fund for agricultural producers. Funds of the fund should be directed to the support of guaranteed prices, procurement and commodity interventions, collateral operations at the expense of the republican budget. The price regulation mechanism should not disrupt the market incentives of management, while simultaneously ensuring that the normally operating economic entities of the agrarian market receive income sufficient for the efficient functioning of production.

3. The situation prevailing in the agriculture of the republic in the course of agrarian reforms makes it necessary to develop fundamentally new and clear approaches to financial and credit policies corresponding to the active role of the state in the economic regulation of agrarian and all agro-industrial production, taking into account the laws adequate to the market economy. The problem of sources of credit resources for agriculture requires a comprehensive solution, which is possible on the basis of co-operation of agricultural producers through the centralized use of traditional domestic sources (land rent, insurance payments, free funds of the population). At the expense of these sources, annual accumulation in the republican budget and subsequent targeted use of credit resources for the needs of agriculture in a volume covering about half of the needs of agricultural producers is possible.

4. Directing budget funds for the creation and development of large farms, it is necessary to provide all-round support to the population's economy through preferential loans for the purchase of breeding animals, milking machines, subsidizing measures for veterinary services and breeding, and the provision of pastures and feed.

5. Activation of leasing activity in the republic will allow, to a certain extent, alleviate the problems of limited financial resources, evenly distribute the costs of rural producers for the purchase of machinery and equipment, make leasing payments on a fixed schedule and simplified contractual conditions and schemes, bring together the interests of the state and commercial leasing firms, economic and legal conditions to reduce risks and increase efficiency. In our opinion, it is necessary to develop a concept for conducting leasing operations as a form of subsidizing rural producers and increasing their income. The policy of leasing operations should be based on the principles of alternativeness, the possibility for the lessee to choose options of technical equipment from the proposed leasing packages.

6. State support for agricultural mortgage lending eliminates the sale and purchase procedure, creates conditions for involving land into economic circulation and attracting financial resources. Research shows that agricultural producers must rely not only on labor and land, but also on capital, borrowed and invested. Attraction of borrowed funds for

economic activity may have different efficiency, which depends on the rational formation of the structure of the sources used. In addition, management in market conditions requires enterprises to be able to recover short-term debts at any time period, that is, to be liquid. In this case, it is advisable to use bill crediting.

7. In determining the principles and amounts of taxation that stimulate growth and production efficiency, we suggest taking into account the levels of profitability of farms, including those related to the objective conditions of their activities. It is necessary to provide the subjects with a number of benefits, to provide lower tax rates with a small number of inclusions, and not high rates with many exceptions. The process of state support for rural entrepreneurs in the West Kazakhstan region is reduced by preferential taxation.

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