

COMPETITIVENESS OF KAZAKHSTAN GRAIN IN DOMESTIC AND
FOREIGN GRAIN MARKETS

ІШКІ ЖӘНЕ СЫРТҚЫ АСТЫҚ НАРЫҚТАРЫНДАҒЫ ҚАЗАҚСТАНДЫҚ
АСТЫҚТЫҢ БӘСЕКЕГЕ ҚАБІЛЕТТІЛІГІ

КОНКУРЕНТОСПОСОБНОСТЬ КАЗАХСТАНСКОГО ЗЕРНА
НА ВНУТРЕННЕМ И ВНЕШНЕМ ЗЕРНОВЫХ РЫНКАХ

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Abstract. In the implementation of one of the main directions of AIC development program, the priority is given to increasing the competitiveness of grain, which is the only large-scale export product of agricultural production, the source of income for agricultural producers, the basis for the livestock development, which plays an important role in ensuring the country's food security. The article notes that in the Republic with a significant variety of natural and economic conditions for conducting grain production, its effectiveness is largely determined by the territorial-sectoral labor division and interregional exchange. However, the instability of domestic and foreign grain markets, high railway tariffs for grain transportation make it difficult to form a rational structure in grain-producing industry depending on the region and increase its efficiency. The reasons for the insufficient use of grain storage capacities (about 50%) are identified, which increases production cost. Storage of marketable grain by agricultural producers often in unsuitable storages worsens its quality indicators, increases weight loss, and therefore reduces the competitiveness of Kazakhstan grain. At the same time, in the country there is a concentration of elevators which are owned by individual domestic and foreign enterprises, while foreign companies purchase the most modern and efficiently operating companies, located in key grain production regions of the country.

Аңдатпа. АӨК дамыту бағдарламасының басты бағыттарының бірін іске асыруда аграрлық өндірістің жалғыз ірі ауқымды экспорттық өнімі, ауыл шаруашылығы тауар-өндірушілерінің кіріс көзі, елдің азық-түлік қауіпсіздігін қамтамасыз етуде маңызды роль атқаратын мал

шаруашылығын дамытудың негізі болып табылатын астықтың бәсекеге қабілеттілігін арттыруға бірінші кезектегі мән беріледі. Мақалада республикада астық өндірісін жүргізудің табиғи және экономикалық жағдайларының едәуір әртүрлілігі, оның тиімділігі көбінесе аумақтық-салалық еңбек бөлінісімен және аймақаралық алмасумен айқындалады. Алайда ішкі және сыртқы астық нарықтары конъюнктурасының тұрақсыздығы, жоғары темір жол астық жүктерін тасымалдау тарифтеріне өңірге байланысты астық өндіру саласында ұтымды құрылымды қалыптастыруды, оның тиімділігін арттыруды қиындатады. Астық сақтау қоймаларының сыйымдылығын жеткіліксіз пайдалану себептері анықталған (шамамен 50%), бұл өндіріс құнын қымбаттатады. Ауыл шаруашылығы тауарын өндірушілердің тауарлық астықты сақтауы көбінесе бейімделмеген қоймаларда оның сапа көрсеткіштерін нашарлатады, массаның жоғалуын арттырады, яғни, қазақстандық астықтың бәсекеге қабілеттілігін төмендетеді. Сонымен қатар елде элеваторлардың жекелеген отандық және шетелдік кәсіпорындардың меншігінде шоғырлануы жүріп жатыр, бұл ретте шетелдік компаниялар республиканың астық өндіретін негізгі аймақтарында орналасқан неғұрлым заманауи және тиімді жұмыс істейтіндерді сатып алуда.

Аннотация. В реализации одного из главных направлений программы развития АПК первоочередное значение принадлежит повышению конкурентоспособности зерна, являющегося единственным крупномасштабным экспортным продуктом аграрного производства, источником доходов сельскохозяйственных товаропроизводителей, основой развития животноводства, играющего важную роль в обеспечении продовольственной безопасности страны. В статье отмечается, что в республике со значительным разнообразием природных и экономических условий ведения зернового производства, его эффективность в большей мере определяется территориально-отраслевым разделением труда и межрегиональным обменом. Однако нестабильность конъюнктуры внутреннего и внешнего рынков зерна, высокие железнодорожные тарифы на перевозку зерновых грузов затрудняют формирование рациональной структуры в зернопроизводящей отрасли в зависимости от региона, повышение ее эффективности. Выявлены причины недостаточного использования емкостей зернохранилищ (около 50%), что удорожает стоимость производства. Хранение товарного зерна сельскохозяйственными товаропроизводителями зачастую в непригодных хранилищах ухудшает показатели его качества, увеличивает потери массы, следовательно, снижает конкурентоспособность казахстанского зерна. Одновременно в стране происходит концентрация элеваторов в собственности отдельных отечественных и зарубежных предприятий, при этом иностранными компаниями приобретаются наиболее современные и эффективно работающие, расположенные в ключевых регионах республики, производящих зерно.

Key words: grain-production regions, production, products, efficiency, market, storage capacities, sales, transport, railway tariffs, food security.

Түйінді сөздер: астық өндіретін аймақтар, өндіріс, өнім, тиімділік, нарық, сақтау сыйымдылығы, өткізу, көлік, темір жол тарифтері, азық-түлік қауіпсіздігі.

Ключевые слова: зернопроизводящие регионы, производство, продукция, эффективность, рынок, емкости хранения, реализация, транспорт, железнодорожные тарифы, продовольственная безопасность.

Introduction. One of the main goals of the State program of development of agriculture of Kazakhstan for 2017–2021 is to increase the competitiveness of domestic agricultural products on the basis of financial stability and modernization of agriculture, accelerated development of its priority sub-sectors.

In this regard, it is of paramount importance to improve the competitiveness of grain, which is the only large-scale export product of agro-industrial production, the main source of income for most agricultural producers, the basis for the development of livestock,

plays an important role in the formation of the state budget and determining – in ensuring food security of the country.

Grain production – one of the few branches of domestic agriculture, which is traditionally integrated into the world grain market, regardless of whether the country is a major exporter or importer of grain and its products [1]. Therefore, both in the near and in the longer term, it is necessary to ensure the expansion of the niche of Kazakhstan grain in the world grain market (especially high-quality grain), for this purpose it is necessary to in-

crease its competitiveness on the basis of innovative and investment development of grain economy with a rational combination of improving the efficiency of natural competitive advantages associated primarily with the possible expansion of the grain wedge, the presence of significant arrays of relatively fertile black soil, and the use of investment and innovative factors of production. Further development of domestic grain production, increasing its competitiveness and efficiency causes an increased need to improve the efficiency of production on the basis of the development of scientific and technological progress.

Material and methods of research. The competitiveness of agricultural products and grain in particular expresses the functional result of the interaction of many internal and external factors and is an effective generalizing indicator characterizing the efficiency of production.

The efficiency of production characterizes the excess of the result over the costs, providing, as a rule, extended reproduction, and competitive products involves simple reproduction [2]. At the same time, the efficiency of production does not reveal the level of satisfaction of the needs of buyers, and for competitiveness this is the main condition. If efficiency does not reflect the level of competitiveness of products, there may be a situation in which even profitable products remain uncompetitive; the main indicator of the efficiency of production is the level of its profitability, and the competitiveness of products is characterized primarily by quality, cost and price. If such a factor as a decrease in the sale price of products is considered in relation to the production efficiency as negative, then it can be positive for the competitiveness of products, since it increases its demand by buyers with a relatively low level of profitability.

To determine the competitiveness of States in the world grain market, it is possible to use the method of its assessment by cost and price. Its essence lies in the fact that production costs, wholesale domestic and export prices of one ton of grain in different countries (in single monetary units) refer to a single estimate of its use properties, taken as 1000. The rating assessment of the state competitiveness is determined by the smallest amount of the obtained indicators of the country.

Results and their discussion. The competitiveness of domestic grain is achieved mainly through the use of its natural advantages, and price competitiveness, based on low wages and undervalued land value.

The main factors limiting the competitiveness of grain in the world market include the natural conditions for the cultivation of individual crops are worse than those of the main grain exporting countries, which requires higher inputs per unit of output. It is impossible not to agree that the agro-climatic potential of each crop is specific and in this respect, for example, rye or wheat, unlike corn, in the United States, practically do not have significant advantages [3]. The main factors of realization of agro-climatic and agro-ecological potential of each country, especially being in favorable soil-climatic and weather conditions, along with high technogenic equipment, are biologization and ecologization of intensification processes.

However, it should be taken into account that in conditions when the world price for certain types of grain is set at the level of costs in countries with more favorable production conditions, the worst natural factors objectively reduce the level of their competitiveness in the world grain market [4].

The presence of a huge territory of the country in combination with local zones of production of certain types of grain plays a role, which implies the need to move significant volumes of their commodity flows within the country and for export, thereby increasing the transport component in the price of grain.

In a situation where the difference in the cost and labor intensity of grain production between individual grain-producing regions of the country is 5-7 times, and the transport component in the price of grain reaches 30-35% when it is delivered by rail at a considerable distance of 3-5 thousand km, significantly increases the cost of grain in remote regions from the market, making such grain less competitive or even uncompetitive in the domestic and foreign grain markets. The situation is aggravated not only by the reduction and aging of the fleet of specialized hopper cars with a capacity of 60 tons, but also by the lack of grain cars with a capacity of 90-110 tons, which are used, for example, by the USA and Canada, which are the main competitors of Kazakhstan and Russia in the world grain market.

The transport factor often forces to increase production of certain types of grain in more expensive regions, thereby constraining the formation of their specialized zones. After all, each crop is characterized by its own "agroecological stimulus", that is, a fairly clear correlation of the magnitude and quality of the crop to the spatial and temporal gradient of temperature, humidity, lighting, content of

mineral nutrition elements and their combination. Therefore, the characteristics of the soil, climate, terrain, weather and other factors should be evaluated on the basis of taking into account the specifics of the corresponding adaptive reactions to them of each cultivated species and even plant varieties.

In a country with its inherent great diversity of natural and economic conditions of grain farming, its effectiveness is largely determined by the territorial and sectoral division of labor and interregional exchange. However, since the beginning of the 90-ies of the last century, the orientation of each grain-producing region to the maximum self-sufficiency in grain, correct in its basis, in the conditions of instability of the internal and external grain markets, unreasonably high railway tariffs and services for the transportation of grain goods did not contribute to the establishment of a rational territorial and sectoral structure of grain production, increasing its efficiency [5].

It led to inefficient use of bioclimatic potential of the territory and production resources, fragmentation of the single national grain market into local closed markets within one region, which negatively affected the quality and competitiveness of grain.

It is necessary to take into account the underdevelopment of transport and market infrastructure, the continuing monopoly of elevators and transport structures, the stretching of railway communications, the mismatch of the placement of grain production volumes, elevators and grain processing enterprises in the country, the low efficiency of the use of vehicles, the lack of a developed cooperative form of grain sales, the high cost of services provided during storage and transportation of grain, the lack of relatively equal access of economic entities to market infrastructure. It is the infrastructure of the grain market that remains the most bottleneck in its development due to the high capital intensity of its individual elements, their inter-sectoral nature of functioning [6].

Due to the aging of the material and technical base of grain storage, the main part of which was created in the 80s of the last century, the disposal of containers exceeds their input.

Currently, there are 223 licensed elevators, the total capacity of which is 13.5 million tons, in the future it is expected to increase the total capacity of elevators to 16 million tons. In recent years, 14 elevators have been built (in Akmola region, West Kazakhstan region, North Kazakhstan region.

Of the available 223 licensed elevators, the total capacity of which is 13.5 million tons, the material and technical base in half of them is in a worn condition.

In Petropavlovsk operates a powerful Elevator in Kazakhstan LLP "HPP TNS - Export" with a design capacity of 120 thousand tons, the Elevator is multicultural - at the same time can take both oilseeds and grains. The volume capacity is 600 tons per hour, which allows to take up to 10 thousand tons per day, the shipping capacity is 1 million tons per year, the technological process at the enterprise is automated, the work is carried out through the operator panels, the feature of the Elevator is low energy consumption. The complex will consume 3-4 times less energy compared to other elevators, as new equipment was used in the construction, solar panels were installed at all auxiliary facilities. The construction of the Elevator amounted to 8 billion tenge, in addition, state support was provided in the amount of 21 million tenge for the infrastructure [7].

Over the past eight years, seven elevators have been modernized in the North Kazakhstan region, 25 new grain-receiving enterprises and 21 granaries have been built. All this allowed to increase the volume of grain storage by 925 thousand tons.

However, due to a number of reasons, their capacity is used by about half, which increases the cost of grain storage. Storage of almost one fifth of the volume of commercial grain by agricultural producers in their own, often unsuitable storage facilities, worsens its quality, and therefore reduces the competitiveness of grain. At the same time, there is a concentration of elevators in the ownership of both individual domestic and foreign companies. At the same time, foreign companies acquire the most modern and efficient elevators located in the key grain-producing regions of the country. The growing influence of foreign capital on the domestic grain market may lead to an increase in export prices for grain, which will spur higher prices in the domestic market and can lead to an unstable state of the agri-food market.

For reliable supply of the country with grain, creation of its export resources, more active influence of the state on development of the internal grain market, strengthening of material and technical base of storage of grain and products of its processing it is expedient to develop the state program of construction of elevators (on the basis of private and public partnership) with the subsequent transfer them to rent or leasing to the domestic grain

companies. This measure will ensure reliable storage of up to 10% of the grain produced in the country and regulate its exports, ensure competition between elevators, which will reduce the cost of storage and processing of grain [8].

Given the strategic and system-forming role of the grain market in the agri-food market, and the need to improve the competitiveness of grain, it is the state that should assume the bulk of the costs for the formation of the missing and improvement of the existing elements of production and market infrastructure, including the creation of information and trade system and improvement of storage and processing of grain in the country.

Until recently, the influence of the state on the competitiveness of grain through the conduct of monetary policy, the implementation of anti-monopoly activities and policy support to grain producers and protect its market, export was minimal in contrast to the major countries-exporters of grain, which is to improve the competitiveness and expand its niche in the international grain market using export subsidies, used the certificate for compliance with international quality standards provide support in the creation of an export infrastructure. In Russia, the level of total support for grain producers increases its profitability by only 5-8 percentage points. In General, the level of state support for domestic agricultural producers is 2.3-7.8 times lower than in Canada, the EU and the US, which significantly reduces the competitiveness of grain [9].

The situation is aggravated by the fact that often the measures taken by the state in certain areas of support are fragmented and insufficient to achieve competitive advantages of domestic grain. In addition, the domestic grain business is not yet able to resist large foreign grain companies with their more powerful financial resources. This is especially true for grain exports, where Western traders have significant advantages by attracting cheaper financial resources, which creates a precedent for the possible absorption of individual companies.

In addition, the lack of real progress in the development of the common grain market within the CIS countries, solving the problems of mutual grain trade, as well as grain exports primarily by Kazakhstan and Russia, where they are constantly competing with each other in the world grain market, is of significant importance.

The world is actively engaged in the process of integration of individual countries, the

organization of unions and economic zones (such as the European Union, the Asian free trade zone, the South African development zone, the free trade zone between the United States, Canada and Mexico) to improve the competitiveness of its products, this requires both for Kazakhstan and Russia coordination of measures in the external grain market, coordinated decision-making.

The main factor in the level of its competitiveness in the domestic and foreign grain markets are prices. However, in the domestic market, they are significantly distorted under the influence of regional authorities and large grain traders, the remaining "gray import" and the shadow market, which contributes to the spontaneous functioning of the domestic grain market with all the ensuing negative aspects for the country's grain supply, the profitability of agricultural producers, the development of grain exports. The solution of these issues requires improving the organizational and economic mechanism to improve the competition. It is necessary to point out the low level of use of the innovative potential of agricultural science in the country. The level of its application is 4-5% against 50% in the United States. The genetic potential of the varieties and hybrids of grain crops created in recent years by breeders is used by less than half. The situation is aggravated by the lack of control of the innovation process, the imperfection of the information support of the grain market participants. The lack of objective and operational accounting of resources and use of grain makes it difficult to make adequate government decisions to regulate the grain market, creates a tense situation with the domestic demand for grain, reduces the tax base.

However, the country has certain advantages that contribute to the competitiveness of grain in both domestic and foreign grain markets. These include: the presence of large grain farms, capable of leading the grain industry through innovation, investment, deepening specialization, increasing the concentration and intensity of grain production, more efficient use of production resources.

As a rule, they can conduct competitive expanded reproduction, using fully such basic strategies of conducting competitive fight as: increase in volume of commodity grain, decrease in its cost price, improvement of quality of grain, segmentation of the market and immediate reaction to its requirements, differentiation of production.

Improving the competitiveness of grain is a complex and multifaceted problem that requires a comprehensive approach to its solu-

tion, based on the theoretical, methodological and methodological basis, taking into account the numerous features of the functioning of the grain market, fixed assets, time and active organizational activities of the state both in the domestic and foreign grain markets.

The main activity of JSC "national company "food contract Corporation" is to participate in ensuring food security of the country, promoting the stabilization of the domestic grain market and export development. The only shareholder of the company is JSC "National managing holding "KazAgro".

Thus, in 2018 Kazakhstan resumed grain exports to Turkmenistan and doubled grain exports to Iran. According to the results of 11 months of 2018, "food contract Corporation" of Kazakhstan exported 401.6 thousand tons of grain and oilseeds, so to the Transcaucasian countries exports amounted to 145.1 thousand tons of wheat, to Central Asia - 126.4 thousand tons of wheat; Iran - 110.6 thousand tons of barley; to China - 19 thousand tons of wheat. When comparing the indicators with 2017, the company exported more than 120 thousand tons of grain and oilseeds.

The increase in exports this year is due to the sale of grain in the off-season from the stocks of the intervention Fund, as well as the resumption of wheat supplies to Turkmenistan and the Transcaucasian countries. For 11 months of 2018 JSC "AK Bidai - Terminal" (a subsidiary of JSC "NC "food Corporation") was sent through the grain terminal in the port of Aktau 712,9 thousand tons of grain, twice more than in the same period of 2017 (about 400 thousand tons of grain).

The growth rate is due to the increase in grain exports and the main direction of grain supplies in the Caspian region is the Islamic Republic of Iran. High rates were achieved due to favorable weather and climatic conditions (lack of wind and precipitation), the availability of free capacity in the seaport of Aktau (free berths) and additional places to accommodate grain wagons.

A subsidiary of the food Corporation "Astyk koymalary" accepted for drying and storage more than 300 thousand tons of grain and oilseeds. The volume of acceptance of grain and oilseeds at the company's grain bases for January-November 2018 amounted to 311.2 thousand tons: 304.4 thousand tons of grain and 6.8 thousand tons of oilseeds. For the same period in 2017, this figure was about 330 thousand tons of grain.

Conclusions.

1. Given the importance and complexity of solving the problem of improving the com-

petitiveness of grain, turning Kazakhstan into one of the key players in the global grain market, increased competition from the main grain exporting countries, it is advisable to include a special section in the State program. Then this problem will not be out of the field of view of the state, whose main task is to create a competitive grain economy that can dynamically develop and compete on an equal footing with the main grain exporting countries.

2. It is large farms that should become a kind of "locomotives" for the effective and sustainable development of the grain economy. Large agricultural organizations producing grain are constantly the main suppliers of commercial grain not only to the domestic market, but also for export, which is primarily due to the large volumes of its production, relatively low cost, higher level of marketability, which is 63-68% against 34-35% in relatively small grain-producing farms, which also tend to have lower grain quality.

3. In modern conditions of management, it is important to prevent excessive crushing of the grain industry, a characteristic feature of which is its management on relatively large land areas. Mainly due to them in the country formed commodity resources for grain exports.

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