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THE EXPORT POTENTIAL OF AGRICULTURAL SECTOR OF KAZAKHSTAN

ҚАЗАҚСТАННЫҢ АГРОӨНЕРКӘСІПТІК КЕШЕНІНІҢ ЭКСПОРТТЫҚ ӘЛЕУЕТІ

ЭКСПОРТНЫЙ ПОТЕНЦИАЛ АГРОПРОМЫШЛЕННОГО КОМПЛЕКСА КАЗАХСТАНА

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Abstract. The article is devoted to the analysis of foreign trade of agricultural products of the Republic of Kazakhstan. The indicators of export of agricultural products of the republic have been analyzed. In the process of studying foreign trade of agricultural goods, the main trading partners or importers have been identified. The analysis of changes in the structure of exported goods to the CIS countries and other countries of the world is presented. The main types of agricultural products,

Аңдатпа. Мақала Қазақстан Республикасының ауыл шаруашылығы өнімдерінің сыртқы саудасын талдауға арналған. Республиканың ауыл шаруашылығы өнімдері экспортының көрсеткіштері талданған. Аграрлық сектор тауарларының сыртқы сауда айналымын зерттеу барысында негізгі сауда серіктестері немесе импорттаушылар анықталған. ТМД елдеріне және әлемнің басқа мемлекеттеріне экспортталатын тауарлар құрылымындағы өзгерістерге талдау жасалған. Қазақстан экспортының құрылымында елеулі үлес алатын аграрлық өндіріс өнімдерінің негізгі түрлері анықталған. Соңғы бес жылдағы ауыл шаруашылығы өнімдерінің халықаралық саудасы көрсеткіштерінің серпініне статистикалық шолу ұсынылған. Жүргізілген зерттеу ел экспортының жалпы құрылымындағы АӨК өнімдері экспортының үлесі шамалы екенін растады. Экспортталатын аграрлық өнімнің айтарлықтай бөлігі Достастық мемлекеттеріне және көршілес елдерге жіберіледі. Шығарылатын ауыл шаруашылығы өнімдерінің едәуір бөлігі дәнді дақылдарға тиесілі. Азық-түлік пен ауыл шаруашылығы шикізатының экспортынан түскен жиынтық кірістердегі тауардың осы санатының үлесі 90 пайызды құрайды. Осылайша, сыртқы сауда қызметі, өткізу нарықтарын кеңейту, экспорттық жеткізілімдерді ұлғайту республика үшін отандық экономиканың өсу көзі болып табылады. Инновациялық өсудің болжамдарын құру және елдің агроөнеркәсіптік өндіріс саласындағы экономикалық саясатын модельдеу кезінде сыртқы факторды ескеру маңызды.

Аннотация. Статья посвящена внешней торговле продукцией сельского хозяйства Республики Казахстан. Проанализированы показатели экспорта сельскохозяйственной продукции республики. В процессе изучения внешнеторгового оборота товарами аграрного сектора выявлены основные торговые партнеры или импортеры. Дан анализ изменений в структуре экспортируемых товаров в страны СНГ и другие государства мира. Определены основные виды продуктов аграрного производства, занимающие существенную долю в структуре экспорта Казахстана. Представлен статистический обзор динамики показателей международной торговли продукцией агропромышленного производства за последнее пятилетие. Проведенное исследование подтвердило, что доля экспорта продукции АПК в общей структуре экспорта страны незначительная. Существенная часть экспортируемой аграрной продукции направляется в государства Содружества и соседние страны. Значительная часть вывозимой сельхозпродукции приходится на зерновые культуры. Доля данной категории товара в суммарных доходах от экспорта продовольствия и сельскохозяйственного сырья составляет 90 процентов. Таким образом, внешнеторговая деятельность, расширение рынков сбыта, увеличение экспортных поставок являются для республики источником роста отечественной экономики. Важно учитывать внешний фактор при построении прогнозов инновационного роста и моделирования экономической политики страны в области агропромышленного производства.

Keywords: agribusiness, agricultural raw materials, food, foreign trade, export, import, international trade, trade partners, economic growth.

Түйінді сөздер: агроөнеркәсіптік кешен, ауыл шаруашылығы шикізаты, азық-түлік, сыртқы сауда айналымы, экспорт, импорт, халықаралық сауда, сауда серіктестері, экономикалық өсу.

Ключевые слова: агропромышленный комплекс, сельскохозяйственное сырье, продовольствие, внешнеторговый оборот, экспорт, импорт, международная торговля, торговые партнеры, экономический рост.

Introduction. In today's market economy, one of the most regulated and state-supported sectors is agriculture. This is determined by the historical and social importance of this sector in

the development of countries, especially in maintaining income and employment in rural areas, ensuring food security, rural development and the desire to preserve the traditional

rural landscape and population. As you know, Kazakhstan is one of the largest grain-growing and grain-processing regions of the world, where traditional animal husbandry is also well developed [1].

Kazakhstan is one of the largest grain-growing countries in the world. Mainly strong and durum wheat varieties with a high content of gluten are cultivated in grain-sowing areas, such wheat is in great demand on the world market [2].

Plantings of grain crops, in general, occupy an area of 21839,9 thousand hectares, of which 15 405,4 thousand hectares are intended for grain crops (including rice) and legume crops, gross yield of which is 20585,1 thousand tons [3].

Agro-industrial complex (hereinafter - AIC) is one of the important sectors of the economy, which forms food and economic security of the country, as well as labor and settlement potential of rural areas. Agro-industrial complex of the Republic of Kazakhstan (hereinafter - the ROK) has good prospects for further development: export positions of oil and meat sectors are strengthening, in addition Kazakhstan has quickly become one of the largest exporting countries of grain and flour in the world. The membership of Kazakhstan in Eurasian Economic Union (hereinafter - EAEU) and World Trade Organization (hereinafter - WTO) creates opportunities and at the same time makes high demands on competitiveness in both domestic and foreign markets.

Material and methods of research. The methodological basis of the research consists of scientific works of domestic scientists and foreign authors in the field of development of foreign trade activities of the state, legislative and regulatory acts of the Republic of Kazakhstan, regulating foreign trade activities of the domestic state.

The methods of historical, institutional, systemic, interdisciplinary, structural and functional, statistical and comparative expertise were widely used in the study of the peculiarities of the formation of the structure of foreign trade activities of the state in the Republic of Kazakhstan. With the use of these methods, the development of the structure of foreign trade activities of the state in the Republic of Kazakhstan in the conditions of the formation of the industrial state allowed to be considered as a complex, complex and sustainable development system.

The results and main conclusions of the research were based on various methods of economic research, such as methods of com-

parative and factor analysis, evaluation methods, logical and statistical methods.

As the information base of the study were laid the legislative documents of the Republic of Kazakhstan, other legal and regulatory acts, analytical collections of the Ministry of the Republic of Kazakhstan, studies of national and international experts and organizations, as well as information on official statistical information of Kazakhstan and foreign countries, periodicals and scientific data.

Results and their discussion. Increased efficiency and higher growth rates of the republic's economy, respectively, agriculture, according to experts, require a better system of state regulation and organization of foreign trade [4].

According to the Statistics Committee of MNE RK, foreign trade turnover of Kazakhstan in 2018 amounted to 77.6 billion USD, which is 25% higher compared to 2017 (62.1 billion USD) [5].

Kazakhstan's exports in 2018 grew by 31.6% to 48.3 billion USD, while Kazakhstan's imports in 2017 grew by 15.5% to 29.3 billion USD.

Export growth is justified by increase in supply of such goods as:

- crude oil - 26.6 billion USD (its share in export is 55%). Growth by 37.8% or 7.3 billion USD (from 19.3 to 26.6 billion USD);

- agricultural commodities – 2.4 billion USD (5% share in exports). Growth by 11.2% or 243.2 million USD (from 2.1 to 2.4 billion USD). Due to an increase in export of such agricultural products as sunflower seeds (by 62.2% or by 34.2 million USD), potatoes (by 5.9 times or by 29.7 million USD), barley (by 26.3% or by 28.7 million USD). At the same time, export of such goods as wheat flour (by 7.1% or 35.7 million USD), wheat (by 4.8% or 33.3 million USD), tobacco products decreased (by 17.6% or 19.4 million USD);

- copper and cathodes from copper - 2.3 billion USD (share 4.8%). Growth by 28.3% or 516.6 million USD (from 1 825.9 to 2 342.5 million USD);

- natural gas - 2.3 billion USD (share 4.7%). Growth by 30.2% or 524.4 million USD (from 1 738.7 to 2 263.1 million USD);

- ferroalloys - 2.2 billion USD (4.6% share). Growth by 57.5% or 805.2 million USD (from 1 400.5 to 2 205.7 million USD);

- ores and copper concentrates - 1.1 billion USD (2.3% share). Growth by 2.3 times or by 620.2 million USD (from 460.1 to 1 080.3 million USD).

Foreign trade turnover of the Republic of Kazakhstan within EAEU grew by 25.9% and

reached 17.4 billion USD in 2017 from 13.8% billion USD in 2017. At the same time, export grew by 30.2% to 5.1 billion USD in 2018 from 3.9 billion USD in 2017. Import reached 12.2 billion USD in 2018, from 9.9 billion USD in 2017.

The main export goods from Kazakhstan to EAEU countries are:

- agricultural products - 457.2 million USD (share in exports 8.9%). Decrease by 1% (by 44.4% or by 49.3 million USD), cotton fiber (by 49.6% or by 12.4 million USD), barley (by 71.9% or by 4.8 million USD). At the same time, export of such goods as chocolate increased (by 59.6% or by 12.1 million USD), sugar confectionery (by 45.6% or by 10.2 million USD), sunflower oil (2.5 times or 5.2 million USD);

- flat rolled products made of non-alloyed steel, hot-rolled - 393.6 million USD (share 7.7%). Growth by 2.7 times (by 245.5 million USD);

- flat rolled products made of non-alloyed steel, plated - 334.6 million USD (share 6.5%). Growth by 41.7% (by 98.4 million USD);

- aluminum oxides and hydroxides - 330.4 million USD (6.5% share). Growth by 3.9% (by 12.5 million USD).

Today, three main groups of countries form the global market for agricultural raw materials: developed market economies, developing countries and transition economies. These groups have a different nature and impact on foreign trade of agricultural products and on the state of relevant global food market.

Developed countries occupy a dominant position in international trade of agricultural products, producing and consuming more than two thirds of it. At the same time, in the first half of the 1990s, there was a tendency to reduce the share of developed countries in world trade of agricultural products and to strengthen position of developing countries.

Export of domestic agricultural products is a very insignificant and consistently diminishing value (share) of both total exports and world trade of relevant products.

Moreover, a significant part of agricultural products exported abroad were meat and by-products (fresh, frozen and chilled), wheat and meslin, barley, rice, wheat flour or wheat-rye flour, wool and cotton fiber (table 1).

Table 1 - Structure of agricultural exports, thousand USD, 2014-2018

Name of goods	2014	2015	2016	2017	2018
meat and by-products	8 163,3	24 541,6	22 984,8	19 942,2	20 120,1
wheat and meslin	125 3937,3	960 072,3	688 738,7	694 089,2	659 526,1
barley	60 329,5	142 761,6	104 368,5	109 078,6	137 151,2
rice	20 824,2	21 336,2	31 015,7	16 413,6	22 026,2
wheaten flour	580 232,6	561 601,4	493 724,2	505 110,9	469 402,2
wool	5 575,0	6 012,7	4 572,3	3 905,2	7 303,9
cotton fiber	137 078,2	80 140,5	53 541,9	78 474,0	92 570,7
Note. Compiled by the authors [6]					

Among the main exported agricultural products, producers of such goods as meat and by-products, barley and wool achieved a significant increase in 2018 compared to 2014. Growth in sales abroad of meat and by-products in 2018 was more than 2.4 times compared with 2014. During the same period, export of barley increased 2.2 times. Overseas wool export increased 1.3 times over the same period.

It should be noted that export growth in these categories of goods was accompanied by increase in production volume, respectively. In 2018, 1.2 times more meat and byproducts were produced than in 2014. 1.3 times more barley, 1.1 times more wool, respectively was produced for the same period (table 2).

The largest part of agricultural output is rice. In 2018, 66.5% of the grown rice was exported. This indicator is growing every year. In

2014, export of this product was 37.2%, in 2016-40.4% of the volume produced. Wheat flour was on the 2nd place. Export of this product in 2018 reached 58.9% of production volume. In 2014, sales volume abroad for this product was at the level of 47.4%, in 2016 it reached 48.6%. The greatest growth in export over the last year was achieved by wool manufacturer. In 2018, they exported 28.7% of the output. Whereas, in 2014, this indicator was 15.7%, and in 2016 - 13.7% of production volume.

Among exported goods in recent years, the share of wheat and cotton is declining. In 2014, 36.7% of grown wheat was exported. In 2016, this figure dropped to 32.6%, in 2018 to 28.4%.

The situation is similar with cotton. In 2014, 20.6% of harvested cotton was sold abroad. In 2017, already 19.6%, and in 2018 decreased to 18%.

Table 2 – Production of the main exported agricultural goods, 2014-2018

	2014	2015	2016	2017	2018
meat and by-products, thousand tons	871,0	900,2	931	960,7	1 017,6
exported, thousand tons	3,0	8,9	11,9	12,4	9,2
wheat, mln ton	13,9	12,9	13,7	14,9	14,8
exported, mln ton	5,1	4,2	3,6	4,5	4,2
barley, mln ton	2,5	2,4	2,6	3,2	3,3
exported, thousand tons	246,0	711,2	632,5	780,8	903,6
rice, thousand tons	144,0	150,5	164,5	173,9	148,5
exported, thousand tons	53,5	51,8	66,4	69,3	98,9
wheaten flour, mln ton	3,8	3,8	3,7	3,9	3,9
exported, mln ton	1,8	1,8	1,8	2,3	2,3
cotton fiber, thousand tons	396,7	20,7	273,9	286,7	330,5
exported, thousand tons	81,7	47,8	39,8	56,1	59,4
wool, thousand tons	37,6	37,8	38,0	38,5	39,0
exported, thousand tons	5,9	6,3	5,2	6,5	11,2
Note. Compiled by the authors [7,8]					

Export volume of barley, meat and by-products has not changed much over the past five years. The share of barley sales abroad in recent years is stable. It remains at the level of 0.2-0.3% of production volume. This indicator on production of meat and by-products is 1.0-1.3% of the volume produced.

Export geography by main agricultural products is diverse. Over the past few years, export of meat and by-products (fresh, frozen and chilled) was carried out in 5 CIS countries and 8 countries of the world. Wheat and meslin was supplied to 6 CIS countries and 25 countries of the world. Barley was exported to 7 CIS countries and 14 countries of the world, rice to 8 CIS countries and 8 countries of the world, wheat or wheat-rye flour to 9 CIS countries and 10 countries of the world, wool to 4 CIS countries and 4 countries of the world, cotton fiber to 5 CIS countries and 7 countries of the world. It should be noted that in the export of basic agricultural goods significant share falls on the CIS countries [9].

Export of such products as meat and by-products (fresh, frozen and chilled), in recent years is decreasing every year.

Compared with the previous year in 2016, export volume for this category of products decreased by -6.43%, or by 1 575 thousand USD from 24 542 thousand USD to 22 906 thousand USD. In 2017, decrease amounted to 13.18% to 19 886 thousand USD, in 2018 by -16.13% to 16 679 thousand USD. This is due to decline in export to the main consumer country. Since, about 75% of such products as meat and by-products (fresh, frozen and chilled) are exported to the Russian Federation. However, export volume of these products to this country decreases every year.

In 2015 10 998 tons were exported, in 2017 – 8 942 tons, in 2018 - already 7 056 tons.

Since 2013, export of wheat and meslin is also decreasing every year. Thus, export of this product to the CIS countries decreased by 32.40% from 910 718 to 615 684 thousand USD. In 2015, by 11.75% to 543 368 thousand USD, in 2016, 10.32% to 487 308 thousand USD, in 2017 by 9.81% to 439 487 thousand USD. Decline was due to a decrease in deliveries of almost 8.9 times to Russia, despite the fact that Uzbekistan and Tajikistan increased their purchases by almost 2 times more. Thus, export volume of this category of products to Russia in 2017 decreased to 130 960 tons from 1 138 377 tons in 2013, whereas in Tajikistan it increased from 654 632 tons to 1 050 834 tons, and to Uzbekistan from 748 132 tons to 1 686 732 tons for the same period. However, in 2018, exports increased compared to the previous year by 37.8% to 605 653 thousand USD. Due to the growth of supplies to Azerbaijan by 3.8 times to 289 124 tons, to Russia by 1.9 times to 246 942 tons, and delivery to Turkmenistan by 259 858 tons began.

In export of such products as wheat or wheat-rye flour there is a tendency of annual decline in the CIS countries. In 2014 decrease amounted to 21.84% to 337 141 thousand USD, in 2015 by 22.55% to 261 128 thousand USD, in 2016 by 34.75% to 170 381 thousand USD, and in 2017 by 16.81% to 141 738 thousand USD. However, in 2018, the growth was 7.9 % to 152 908 thousand USD.

It should be noted that decline in export of these products is associated with a decrease in demand from Uzbekistan by almost 1.5 times. If in 2013, export amounted to 983 918 tons, in 2017 – 627 185 tons. And also with a decrease in supplies to Tajikistan from

231 666 tons of 2013 to 53 100 tons in 2017. However, export growth in 2018 was provided by such countries as Kyrgyzstan (by 42.2% to 35 439 tons), Russia (by 63.5% to 31 673 tons), Turkmenistan (by 76.9% to 63 250 tons).

For this category of products, exports to the rest of the world increased, despite the decline in 2018. Deliveries volume in 2013 amounted to 428 561 tons, then in 2015 - 784 783 tons, in 2017 - 1 555 157 tons, however in 2018 it decreased to 1 456 422 tons. The main importer of this product is Afghanistan. Purchases volume by this country was carried out in 2013 - 420 564 tons, in 2015 - 778 676 tons, in 2017 - 1 545 319 tons, in 2018 - 1 422 654 tons.

A similar situation is observed in the export of other major agricultural products to the rest of the world.

In recent years, there has been an increase in barley export to the rest of the world. Thus, in 2016, the growth amounted to 1.05% and reached 99 135 thousand USD, in 2017 it grew by 32.08% to 130 939 thousand USD, in 2018, 2.4 times to 293 537 thousand USD compared to the previous year. Cotton fiber export increased by 99.32% and reached 42 163 thousand USD, in 2017 by 37.66% to 58 043 thousand USD, however, in 2018 it decreased to 45 686 thousand USD.

In addition, wool export in 2018 reached maximum volume over the past 5 years. If, in 2016, export volume amounted to 3 348 thousand USD, then in 2017 it reached 7 077 thousand USD, in 2018, 6 086 thousand USD, although exports amounted to 12 540 tons.

Also, export of wheat and meslin in recent years is increasing. If in 2016 export of this product was 206 781 thousand USD, then in 2017 it grew by 42.24% or 220 039 thousand USD. However, compared to 2014, export decreased by 36.1%. The main buyers are such countries as China, Afghanistan and Italy. In 2017, China imported 28% of all meslin and wheat exported. Import volume of these products amounted to 306 913 tons, whereas in 2013 the volume amounted to 124 357 tons. In 2018 China imported 549 999 tons. Afghanistan increased import volume of wheat and meslin more than 8 times. In 2013, export amounted to 33 524 tons, in 2015 - 140 386 tons, in 2017 - 284 518 tons, in 2018 - 386 757 tons.

A similar situation is with export from Italy. In 2014, this country imported only 21 733 tons, but in 2016 it already imported 156 165 tons, and in 2017- 233 100 tons, in 2018 - 348 419 tons.

It should be noted that growth of rice export to other countries in 2017 increased by 16 times compared with last year. In 2016, export increased by 22 times or 176 thousand USD, in 2015 - 8 times or 2 856 thousand USD. However, in 2018 it decreased to 1 599 thousand USD.

The main buyers are the CIS countries. Thus, in 2017, Russia imported more than 50% of exported rice to the CIS countries and 48% of all exports. Having increased import volume by more than 2 times compared to 2013, export volume to this country in 2013 was at the level of 21 584 tons, in 2017 - 47 631 tons. However, in 2018 the export of rice in this country has declined by 36.9% to 30 009 tons.

Tajikistan ranks second with an import volume of 33 245 tons, and Ukraine 12 937 tons of rice by the results of 2017 and Uzbekistan 11 958 tons by the results of 2018.

As for barley export to the rest of the world in 2017, 96.9% or 831 045 tons belong to Iran. In 2018, this country purchased 1 595 718 tons. In 2013, barley export to this country amounted to 121 644 tons or 72% of export to other countries of the world. Afghanistan is in 2nd place in terms of barley import. In 2014, this country bought 9 314 tons, in 2017 there were 15 387 tons of barley, however in 2018 it decreased to 11 837 tons.

In recent years, there has been a tendency to increase export of wool and cotton fiber to non-CIS countries. The main importer of wool is China, which every year increases purchase volume. In 2014, purchase volume amounted to 3 681 tons of wool, then in 2017 - 10 627 tons or 94.8% of the total export of these products, in 2018 it grew 11 315 tons.

Export of cotton fiber is sent to such countries as the Republic of Latvia, the Republic of Moldova and Russia. In 2017, import from Latvia amounted to 32 572 tons or 54.8%, Moldova 11 991 tons or 20.2%, Russia 6 573 tons or 11.1% of total export. Compared to 2013, import volume by Russia decreased by almost 5 times or from 32 852 tons. However, in 2018 the volume of exports to other countries decreased by 26.6% to 27 229 tons [10].

Conclusions. Thus, it is possible to speak about fully formed areas of domestic agricultural products export, focused on quite stable models of foreign trade operations and demand from the partner countries for the products of agro-industrial complex.

1. Possibilities of intensive growth in revenues from export of basic agricultural

products are practically not exhausted. Export potential can be increased without significant damage to domestic market and domestic consumption. Part of export of agro-industrial complex products accounts for grain crops. Their share in total income from export of food and agricultural raw materials was more than 90%. Thus, export of wheat and meslin accounts for 46.8%, wheat flour 33.3%, barley 9.7%, rice 1.6%. Whereas, the share of cotton fiber is 6.6%, meat and by-products 1.4% in total export of agricultural products.

2. In general, the above indicators and trends in dynamics of agro-export do not give grounds for optimism regarding its prospects. The total income from the export of basic agricultural products in 2014 amounted to 20 661 thousand USD, in 2017 – 1 427 014 thousand USD, in 2018 – 1 408 100 thousand USD. Based on these indicators, it is possible to calculate how much profitability of agricultural products export will change in the future. As a result of calculations, the following equations were obtained: $y = -16855x + 2E + 06$.

3. The basis for entering the world market should be not only the use of already existing competitive advantages, but creation of economic mechanism that forms a competitive environment that allows local enterprises to achieve international success. The potential of the republic in this direction lies in:

- improvement of exported products structure;
- improvement of efficiency of foreign trade operations regulation;
- unshadowing;
- improvement of financial position of manufacturers.

With respect to domestic producers of agricultural products, a policy of state protectionism should be pursued, ensuring conditions for normal competition in domestic and foreign markets (through application of sound customs duties, taxes, fees).

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