

ЕЭО ЖАҒДАЙЫНДАҒЫ ҚАЗАҚСТАННЫҢ ТАҒАМ ИНДУСТРИЯСЫ

ПИЩЕВАЯ ИНДУСТРИЯ КАЗАХСТАНА В УСЛОВИЯХ ЕАЭС

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Abstract. The authors analyzed the development of food industry and agriculture from the standpoint of foreign economic activity. The main problems of integration economic processes in the conditions of the Eurasian Economic Union are revealed. The structure of export and import of livestock and crop production products, ready food products of Kazakhstan with the EAEU countries by major product groups for the first half of 2019 is presented. Perspective directions of cluster formation in food production sectors are considered. A comparative analysis of production volumes of agricultural sector and food industry is presented. The interpretation in the form of tables indicating the geography of export and import of food products of the republic among the States of the Eurasian Economic Union is shown. The problems and directions of the development of agricultural production in the frame of State programs to support agricultural sector are identified. The list of government subsidized spheres of food industry of the republic has been studied. The analysis of the dynamics and indices of industrial production of food and beverages, which largely depend on the development of agriculture and food sector of economy, is shown. Long-term directions for improving agro-industrial complex of the Republic of Kazakhstan by 2027 were considered in seven priority sectors. The authors note that in order to assess the macroeconomic effect of functioning of the AIC within the EAEU, attention should be paid to the development of the industry in conjunction with the needs of the domestic and foreign markets.

Аңдатпа. Авторлар сыртқы экономикалық қызмет тұрғысынан азық-түлік индустриясы мен агроөнеркәсіптік кешеннің дамуына талдау жасаған. Еуразиялық экономикалық одақ жағдайында интеграциялық экономикалық процестердің негізгі мәселелері анықталған. 2019 жылдың бірінші жартыжылдығында негізгі тауар топтары бойынша ЕЭО елдерімен

Қазақстанның мал және өсімдік өнімдері, дайын азық-түлік тауарлары экспорты мен импортының құрылымы ұсынылған. Азық-түлік өндірісі салаларында кластерлерді қалыптастырудың перспективалы бағыттары қарастырылған. Аграрлық сектор мен тағам өнеркәсібі өнімдерінің көлеміне салыстырмалы талдау жасалған. Еуразиялық экономикалық одақ мемлекеттерінің арасында республиканың тағам өнімдерінің экспорты мен импорты географиясының кестесі түрінде түсіндірулер көрсетілген. АӨК қолдау бойынша Мемлекеттік бағдарламалар аясында аграрлық өндірісті дамыту мәселелері мен бағыттары белгіленген. Республиканың тағам индустриясының мемлекет субсидиялайтын салаларының тізімі зерделенген. Азық-түлік өнімдері мен сусындарды өнеркәсіптік өндіру серпіні мен индекстеріне талдау жасалған, олар айтарлықтай дәрежеде ауыл шаруашылығы мен экономиканың тағам секторының дамуына байланысты болады. Қазақстан Республикасының агроөнеркәсіптік кешенін 2027 ж. дейін жетілдірудің ұзақ мерзімді бағыттары жеті басым салалары бойынша қарастырылған. Авторлар ЕЭО аясында АӨК-нің жұмыс істеуінің макроэкономикалық әсерін бағалау үшін ішкі және сыртқы нарықтардың қажеттіліктерімен бірге саланың дамуына назар аудару қажет екенін атап өткен.

Аннотация. Авторами проанализировано развитие пищевой индустрии и агропромышленного комплекса с позиции внешнеэкономической деятельности. Выявлены основные проблемы интеграционных экономических процессов в условиях Евразийского экономического союза. Представлена структура экспорта и импорта продуктов животного и растительного происхождения, готовых продовольственных товаров Казахстана со странами ЕАЭС по основным товарным группам за первое полугодие 2019 г. Рассмотрены перспективные направления формирования кластеров в отраслях производства продовольствия. Дан сравнительный анализ объемов продукции аграрного сектора и пищевой промышленности. Показана интерпретация в виде таблиц географии экспорта и импорта пищевых продуктов республики среди государств Евразийского экономического союза. Обозначены проблемы и направления развития аграрного производства в рамках государственных программ по поддержке АПК. Изучен перечень субсидируемых государством сфер пищевой индустрии республики. Дан анализ динамики и индексов промышленной выработки продуктов питания и напитков, которые в значительной степени зависят от развития сельского хозяйства и пищевого сектора экономики. Рассмотрены по семи приоритетным отраслям долгосрочные направления совершенствования агропромышленного комплекса Республики Казахстан до 2027 г. Авторы констатируют, что для оценки макроэкономического эффекта функционирования АПК в рамках ЕАЭС следует обратить внимание на развитие отрасли в совокупности с потребностями внутреннего и внешнего рынков.

Keywords: agribusiness, food industry, integration, production, food, export, import, public support, subsidies, competitiveness.

Түйінді сөздер: агроөнеркәсіптік кешен, тамақ индустриясы, интеграция, өндіріс, тағам өнімдері, экспорт, импорт, мемлекеттік қолдау, субсидиялар, бәсекеге қабілеттілік.

Ключевые слова: агропромышленный комплекс, пищевая индустрия, интеграция, производство, продукты питания, экспорт, импорт, государственная поддержка, субсидии, конкурентоспособность.

Introduction. The issues of regional economic integration and the development of foreign trade are given great attention both in foreign and domestic economic literature. The purpose of the scientific research in the framework of this publication is to conduct a consolidated macroeconomic analysis of the development of the food industry and agro-industrial complex in Kazakhstan under the conditions of the EAEU.

According to the analysis of the current state and development of the industry, the food industry of Kazakhstan occupies an important place in the development of the overall economy of the country. A significant expansion

of production capacity of the food industry is associated with an active state policy to provide support to enterprises-producers of food products to increase the presence of domestic goods in domestic consumption, as well as the development of new export markets. In modern conditions for Kazakhstan, the development of integration processes is of particular and urgent importance, since the country's participation in international economic integration is not only a condition for creating the economic basis of the sovereignty of the government, but also for ensuring high economic growth of the country, its entry into the world community as a full participant. The

development of inte-gration processes was a natural result of the growth of the international movement of goods and factors of their production [1].

One of the priorities of agricultural policy is to create the necessary conditions for the expansion of domestic production and increase the competitiveness of products of the food industry and agro-industrial complex on the basis of the formation of integration relations and improvement of state regulation. Kazakhstan's food industry and the agro-industrial sector as a whole is concentrated in the segments of food production, in the flour and starch industries, in the production of meat and meat products, as well as dairy products. The food industry of the country has a significant presence in the domestic market. However, there is a predominance of the share of imported products in a number of commodity items of the food industry.

Material and methods of research. The authors used complex methods of scientific generalization, the method of macroeconomic analysis and synthesis, the statistical method, and the graphical method. In particular, the authors used specific methods of macroeconomic research, such as the method of macroeconomic aggregation. The theoretical basis of the research within the publication was the work of domestic and foreign scientists and economists in the field of regional and international economic integration. The analytical base of the study was the regulatory legal acts in the field of economic integration of Kazakhstan in the EAEU, the Treaty on the Eurasian Economic Union, the Regulation on the Eurasian Economic Commission and other agreements concluded within the EAEU, as well as official Internet resources of the Ministry of National Economy of the Republic of Kazakhstan, the Ministry of Agriculture of the Republic of Kazakhstan, Committee on Statistics of the Ministry of National Economy of the Republic of Kazakhstan. The main statistical and analytical materials are displayed using tables. The object of research is the dynamics of the development of the food industry and agribusiness in Kazakhstan in the EAEU. The subject of the study is the macroeconomic indicators of the development of the above sectors of the national economy and the integration factors of Kazakhstan in the single economic space (hereinafter referred to as the CES). To analyze the macroeconomic state of development and functioning of the food industry of Kazakhstan in the EAEU, the authors drew attention to the development of the industry's production, coupled with the development

of the consumption market, both internal and external.

Results and their discussion. The Eurasian Economic Union (hereinafter - the EAEU) is an international integration economic association, which is an international organization of regional economic integration with international legal personality. Currently, 5 countries are already EAEU member states: Kazakhstan, Russia, Belarus, Armenia and Kyrgyzstan. The EAEU Treaty establishes the Parties to the Eurasian Economic Union, within the framework of which freedom of movement of goods, services, capital and labor is ensured, as well as a coordinated, coordinated or uniform policy in the sectors of the economy defined by this Agreement and international treaties within the EAEU. The main directions of the coordinated macroeconomic policies of the member states within the EAEU include:

- ensuring the sustainable development of the economies of member states using the integration potential of the EAEU and the competitive advantages of each member state;
- the formation of common principles for the functioning of the economy of member states and ensuring their effective interaction;
- creating conditions for increasing the internal stability of the economies of member states, including ensuring macroeconomic stability, as well as resistance to external influences and others [2].

If we analyze the state of mutual trade of Kazakhstan with the EAEU in the current 2019, then according to the Committee on Statistics of the Ministry of National Economy (hereinafter - the MNE) of the Republic of Kazakhstan, then in January – April 2019, mutual trade of the Republic of Kazakhstan with the EAEU countries amounted to 6 125.8 million USD, which is 0.1% more than in January-April 2018, including export amounted to USD 1 865.3 million (decreased by 3.8%), import – 4 260.5 million US dollars (increased by 1.9%). Of the total foreign trade turnover of Kazakhstan with the EAEU countries, 92.6% falls on the Russian Federation, 4.1% - on the Kyrgyz Republic, 3.1% - on the Republic of Belarus and 0.1% - on the Republic of Armenia [3].

Table 1 shows the commodity structure of export and import of Kazakhstan to and from the EAEU countries for January-April 2019.

As can be seen from the data of tables 1, mineral products, as well as metals and products from them, occupy a large share in the commodity structure of Kazakhstan's exports. In the commodity structure of imports of the Republic of Kazakhstan, the largest share is occupied by imports of machinery, equipment,

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vehicles, instruments and assemblies. Food production is one of the most important sectors of the economy of Kazakhstan and an

intensively developing sector in the manufacturing industry.

Table 1 - Commodity structure of export and import of the Republic of Kazakhstan to and from the EAEU countries (in percent)

Name of exported and imported products	Share in export	Share in import
Mineral products	40,5%	13,6%
Products of the chemical and related industries	14,3%	15,3%
Metals and products from them	25,0%	16,1%
Products of animal and vegetable origin, prepared food products	10,4%	13,5%
Machines, equipment, vehicles, devices and units	7,8%	27,3%
Other	2,0%	14,2%
*Note: Compiled by the authors based on the source [4].		

Currently, the development of clusters in industries for the production and processing of products such as: grain (in Akmola, Kostanay and North Kazakhstan regions); milk (in Akmola, Almaty, East Kazakhstan, Kostanay and North Kazakhstan regions); fruits and vegetables (in Almaty, Zhambyl and South Kazakhstan regions); meat (in Kostanay, Pavlodar and North Kazakhstan regions); rice (in Kyzylorda region); fish (in Atyrau, East Kazakhstan and Karaganda regions); cotton (in the South Kazakhstan region); leather (in Aktobe, Karaganda and North Kazakhstan regions); wool (in Aktobe, East Kazakhstan and Zhambyl regions). At present, the country is actively pursuing the State program for the development of the agro-industrial complex, calculated until 2021.

Planned effect of the program:

♦ increase of labor productivity in agriculture from 1.2 million tenge to 3.7 million tenge per employee;

♦ increase in exports of processed agricultural products from 945.1 million us dollars to 2 400 million us dollars;

♦ increase in the inflow of investments in fixed capital in the industry by 2021 by 2.5 times to the level of 2017;

♦ the volume of attracted credit funds will increase by 9 times by 2021 to the level of 2017 [5].

In January-June 2019, compared with January-June 2018, the industrial production index was 102.6%. An increase in production volumes was recorded in 14 regions of the republic, a decrease was observed in the Kyzylorda, West Kazakhstan and Mangistau regions. Table 2 shows the indices of industrial food production and beverage production.

Table 2 - Indices of industrial food production and beverage production (in percent)

	January – may 2019 to January – may 2018	June 2019		January – June 2019 to January – June 2018
		to May 2019	to June 2018	
Whole industry	102,0	106,8	105,9	102,6
Manufacturing industry	103,6	100,9	102,5	103,4
Food production	101,2	100,1	101,5	101,3
Beverage production	118,9	99,9	100,1	115,8
* Note: Compiled by the authors based on the source [6].				

According to the Ministry of National Economy of the Republic of Kazakhstan, in January-April 2019, the volume of production in the food industry (taking into account the production of food and beverages) amounted to 613 billion tenge, an increase of 2.2% per year. This is the maximum volume of production in the food industry in recent years. The largest share (81%) of the food industry is traditionally food production. In monetary terms, this indicator amounted to 496.7 billion tenge,

which is 1.1% less than for this period of 2018. The growth of production in the food industry was ensured by the production of drinks. Over the 4 months of 2019, the volume of drinks produced reached 116.3 billion tenge - 19.5% more than in the same period in 2018 (industrial production index was 122%). According to table 3, it can be seen that there is a positive trend in the growth of food and beverage production in the country.

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Table 3 - The volume of production in the food industry, billion tenge

	2014	2015	2016	2017	2018	2019 (January- April)
Food production	298,2	310,9	381,8	446,3	502,4	496,7
Beverage production	63,1	65,6	67,9	78,1	97,3	116,3
Total production:	361,3	376,5	449,7	524,4	599,7	613

*Note: The table was developed by the authors based on the source [лк. 3].

It should be noted that support for the food industry by injecting capital investment has declined. So, in January-April 2019, the total amount of investments in fixed assets of the food industry amounted to 25.9 billion tenge, and decreased by 20.9% compared to 2018. The share of investments in the food industry amounted to only 0.9% of the total investment in fixed assets of the Republic of Kazakhstan. It should be noted that in 2018, investments in fixed assets of the food industry reached a record amount over the past 5 years and reached 32.7 billion tenge, which amounted to 1.2% of the total amount of investments in fixed assets in 2018.

The number of operating enterprises in the food industry of Kazakhstan at the end of August 2019 reached 2.7 thousand entities, which is 5.7% more than in the same period last year. Of these, 2 600 business entities

(enterprises) operate in small business, the remaining 134 - in medium-sized business, including 2 400 companies engaged in food production, and 343 companies engaged in the production of beverages.

In order to support producers of small and medium-sized businesses, the subsidiary of the National Manager of Halling «Baiterek» Fund «Damu» has been organizing exhibitions of domestic producers «ULTTYQ ÓNIM» since 2015. In 2019, the exhibition was attended by representatives of more than 500 companies from all over Kazakhstan, as well as from Turkey, Azerbaijan, South Korea and Russia.

On the basis of tabular data, called the Structure of exports and imports of the Republic of Kazakhstan by major commodity groups with the EAEU countries, we have compiled the following analytical tables 4,5.

Table 4 - Kazakhstan imports with the EAEU countries by commodity groups For January-August 2019

Imports (thousand us dollars)			In % to the total		
	all import (by major product groups)	products of ani- mal and vegeta- ble origin, ready-made food products		total im- ports (by major product groups)	products of ani- mal and vegeta- ble origin, ready-made food products
Countries EAEU (total):	9 279 473,4	1 297 625,7	Countries EAEU (total):	100%	14,0%
Russia	8 696 299,9	1 167 024,3	Russia	100%	90,0%
Belarus	413 215,0	100 819,1	Belarus	100%	7,7%
Armenia	3 852,9	1 930,7	Armenia	100%	0,15%
Kyrgyzstan	166 105,6	27 851,6	Kyrgyzstan	100%	2,14%

*Source: The table is developed by the authors on the basis Structure of imports by main commodity groups with the EAEU countries [7].

As can be seen from the data of table 4, imports of animal and vegetable products and finished food products account for a considerable share of 14.0% of all imports by major commodity groups from the EAEU countries.

In January-August 2019, food and food products worth 1 297 626 thousand dollars US were imported from the EAEU countries. The lion's share of this group of goods was imported from Russia and amounted to 90.0%,

from Belarus - 7.7%, from Armenia - 0.15%, from Kyrgyzstan - 2.14%.

As can be seen from the data of table 5, the export of livestock and plant products and finished food products accounts for 10.0% of all exports by major commodity groups to the EAEU countries. The main trade partner of Kazakhstan among the EAEU countries in food and food products both in exports and imports is the Russian Federation.

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Table 5 - Export of Kazakhstan with the EAEU countries by commodity groups For January-August 2019

Exports (thousand us dollars)			In % to the total		
	all export (by major product groups)	products of animal and vegetable origin, ready-made food products		total exports (by major product groups)	products of animal and vegetable origin, ready-made food products
Countries EAEU (total):	3 979 858,8	397 438,9	Countries EAEU (total):	100%	10,0%
Russia	3 549 425,7	269 587,9	Russia	100%	67,8%
Belarus	63 563,4	5 279,3	Belarus	100%	1,32%
Armenia	4 537,6	3 706,5	Armenia	100%	0,93%
Kyrgyzstan	362 332,1	118 865,2	Kyrgyzstan	100%	29,9%
*Source: The table is developed by the authors on the basis Structure of exports by main commodity groups with the EAEU countries [lk. 7].					

The state pays great attention to the sustainable development of both the food industry and agriculture in General. Among the measures of state support of the studied industries, the most important are subsidies, loans, concessional financing, tax incentives. According to the food industry Committee of the National chamber of entrepreneurs of Kazakhstan «Atameken» (hereinafter – NCE), the list of subsidized areas in the food industry is presented below. The list of subsidized areas in the food industry is as follows:

- creation and expansion of enterprises for processing, procurement, transportation of milk and dairy products;
- establishment and expansion of enterprises for processing, procurement, transportation of meat and meat products;
- creation and expansion of enterprises for processing and storage of fruits and vegetables;
- sugar production;
- production of fat and oil products;
- creation and expansion of enterprises for deep processing of grain and oilseeds;
- production of confectionery.

The share of recovery by the state for all types of priority areas is 30% [8].

The food industry Committee of NCE «Atameken» was formed in November 2013. The Committee of food industry is a permanent working body of the Presidium of The national chamber. The task of the Committee is to analyze and develop proposals for the Presidium and the Board of the National chamber on:

- conceptual approaches to state policy in the food industry;
- to improve the legislation of the Republic of Kazakhstan in the industry;
- identification of priority problems in the food industry requiring legislative and (or) organizational solutions, etc.

NCE «Atameken» has developed measures to reduce food imports and a detailed plan of import substitution for each industry, which were presented at the meeting of the food industry Committee on June 6, 2019.

The program for the development of productive employment and mass entrepreneurship for 2017–2021 «Enbek», which aims to promote productive employment of the population and involve citizens in entrepreneurship, plays a major macroeconomic role. One of the objectives of the implementation of the Program is training in the basics of entrepreneurship under the «Bastau Business» project, which involves unemployed persons, regardless of registration at the Employment Centers and self-employed persons with entrepreneurial potential, members of agricultural cooperatives, as well as people living in rural areas and in small cities of Kazakhstan. It is important to note that long-term programs play a large role in the implementation of the agrarian policy of the country [9].

On the basis of the studied data, it can be summarized that the production of food and beverages to a great extent depends on the development of production of agricultural goods, as well as food products, the total share of costs for goods of these industries is 82.4% of all costs. Food industry products are most used in food production – 29.2% of all products were sent to the food industry itself. It should also be noted that 28.7% of food in 2018 was used in the sphere of public catering and trade. While 18.2% of the produced food products were used in the agricultural sector of the country. In addition, a total of 20.2% of the food produced was used in the provision of public services, in particular in the areas of health, social assistance and education. It is noteworthy that the costs of procurement of special goods in these areas are

covered from the national budget. Therefore, 1/5 of purchases of food products is carried out through state orders.

Based on the above data, it can be concluded that the food industry is import-dependent, since most sectors/sub sectors, despite the existing domestic production, are more dependent on supplies to the domestic market from other countries. In particular, the most import-dependent sectors of Kazakhstan (the share of imports in domestic consumption is more than 30%) are the production of meat products, dairy products (for example, cheese and cottage cheese, butter), tea and coffee, sugar and wine and vodka products. There is a high level of import dependence on fruits and vegetables, including fruits, fish processing products, the share of imports in domestic consumption is more than 70%. However, in the industry under consideration there are sectors aimed at both saturations of the domestic market and external markets. This is the production of pasta, flour, cereals and vegetable oils. In our opinion, this reduction in production is primarily due to a decrease in the purchasing power of consumers and the presence of inflationary trends in the country's economy, which negatively affect the dynamics of consumption of basic food products included in the consumer basket of the population.

State support of employment in the agrarian sector is one of the primary priorities of not only agrarian but also economic policy. The program for the development of productive employment and mass entrepreneurship for 2017-2021 «Enbek», which aims to promote productive employment of the population and involve citizens in entrepreneurship, plays a major macroeconomic role. One of the objectives of the implementation of the Program is training in the basics of entrepreneurship under the «Bastau Business» project, which involves unemployed persons, regardless of registration at the Employment Centers and self-employed persons with entrepreneurial potential, members of agricultural cooperatives, as well as people living in rural areas and in small cities of Kazakhstan [10].

Despite the existing import dependence on some food products, the positive dynamics of growth in production, the contribution of the food industry in the GDP of Kazakhstan remains stable. At the same time, the share of the industry in the volume of manufacturing industry in 2018 is high - 23.8%. According to the results of 2018, the share of the food industry in the total volume of industry is 8.9%. In the production of food industry in the context of commodity groups, high growth in value vol-

umes is expressed by a high rate of growth in prices for food products. It should be noted that the growth in the value of the food industry amounted to 39.8%, while physical volumes on average increased by 3.5%. Thus, during the period from 2015 to June 2019, food prices increased by more than 30%. The consumer price index in May 2019 compared to December 2018 amounted to 104.2%. Food prices for January-June 2019 increased by 4.8% [Ik. 3].

It can be stated that the import dependence of the country has been formed for the main food products. In order to assess the macroeconomic effect of the development of the food industry and the agricultural sector of Kazakhstan and their readiness to operate in the EAEU, attention should be paid to the development of the manufacturing industry, coupled with the development of the consumer market, both internal and external (in particular, the markets of Russia, Belarus, Armenia and Kyrgyzstan).

Conclusion:

1. The main trading partner of Kazakhstan among the EAEU countries in food and food products, both in export and import is the Russian Federation.

2. In the food industry in the context of commodity groups, high growth in value volumes is expressed by a high rate of growth in prices for food products. The production of food and beverages in Kazakhstan depends to a great extent on the development of production of agricultural goods, as well as food products.

3. The food industry is import-dependent, as most sectors / sub sectors, despite the development of domestic production, are more dependent on supplies to the domestic market from other countries.

4. Dynamic development and significant expansion of production capacities of agriculture and agro-industrial sector is multiplicatively connected with active state support of these spheres, subsidizing and concessional lending of economic entities and enterprises-producers of agricultural and food products to increase the presence of domestic goods in domestic consumption, as well as the development of new export markets.

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