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ЕУРОПА ЕЛДЕРІНДЕГІ ТАҒАМ ӨНЕРКӘСІБІ: ҚАЗІРГІ ЖАҒДАЙЫ МЕН БОЛАШАҒЫ

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Abstract. Current state of food industry in the countries of the European continent: Denmark, Finland and Germany has been studied. Two main categories of processing industry are considered. Food production enterprises included in extractive sector are presented: salt production, fishing, seafood, etc. Large manufacturers of meat and dairy products are shown: meat processing concern "Danish Crown", "Arla Foods" (milk and dairy products), "Carlsberg" - production of beer and soft drinks, ingredients for food industry. The analysis of trends in development of food industry in Finland, large sectors for production of food products (meat processing, dairy and bakery), foreign trade in food and agricultural products, their exports and imports by region and country is presented. The largest companies in food industry of this country have been identified. The current state of food production in Germany is described (materials of the Federal Statistical Office on meat, confectionery, poultry industry). The dynamics



of trade turnover in the EU and EAEU member States is shown. The topical issues of management of the priority sector of economy on domestic and foreign markets of food products have been investigated. Economic analysis of the industry for each individual country is carried out. Issues related to import and export of manufactured products have been studied. Examples of the activities of the leading manufacturers are given.

Аңдатпа. Еуропалық континент елдері: Дания, Финляндия және Германия тағам өнеркәсібінің қазіргі жағдайы зерттелген. Қайта өңдеу саласының екі негізгі санаты қаралған. Өндіруші секторға енгізілген тамақ өнімдерін өндіретін кәсіпорындар ұсынылған: ас тұзын алу, балық аулау, теңіз өнімдері және т.б. Ет–сүт өнімдерінің: "Danish Crown" ет өңдеу концерні, "Arla Foods" (сүт және сүт өнімдері), "Carlsberg" - сыра және алкогольсіз сусындар, тағам индустриясы үшін ингредиенттер шығаратын ірі өндірушілер көрсетілген. Финляндияның тағам өнеркәсібінің, азық-түлік тауарларын (ет өңдеу, сүт және нан пісіру) өндіру бойынша ірі секторлардың, Тамақ өнімдері мен ауыл шаруашылығы өнімдерінің сыртқы саудасының, олардың өңірлер мен елдер бойынша экспорты мен импортының даму үрдістеріне талдау жасалған. Осы елдің тағам саласының ірі компаниялары көрсетілген. Германиядағы тағам өндірісінің қазіргі жағдайы сипатталған (ет, кондитерлік, құс өнеркәсібі бойынша Федералдық статистикалық ведомствоның материалдары). ЕО және ЕАЭО мүше мемлекеттердегі тауар айналымының динамикасы көрсетілген. Азық-түлік тауарларының ішкі және сыртқы нарықтарында экономиканың басым секторларын басқарудың өзекті мәселелері зерттелген. Әрбір жеке алынған ел бойынша салаға экономикалық талдау жүргізілген. Өндірілген өнімнің импорты мен экспортына байланысты мәселелер зерделенген. Жетекші тауар өндірушілер қызметінің мысалдары келтірілген.

Аннотация. Изучено современное состояние пищевой промышленности стран европейского континента: Дании, Финляндии и Германии. Рассмотрены две основные категории перерабатывающей отрасли. Представлены предприятия по производству продуктов питания, включенные в добывающий сектор: получение поваренной соли, промысел рыбы, море-продуктов и др. Показаны крупные производители мясомолочных продуктов: мясоперерабатывающий концерн "Danish Crown", "Arla Foods" (молоко и молочная продукция), "Carlsberg" – выпуск пива и безалкогольных напитков, ингредиентов для пищевой индустрии. Дан анализ тенденций развития пищевой промышленности Финляндии, крупных секторов по выработке продовольственных товаров (мясо-перерабатывающего, молочного и хлебопекарного), внешней торговли продуктами питания и сельхозпродукцией, их экспорта и импорта по регионам и странам. Выделены крупнейшие компании пищевой отрасли этой страны. Описано современное состояние пищевого производства в Германии (материалы Федерального статистического ведомства по мясной, кондитерской, птицеводческой промышленности). Показана динамика товарооборота в государствах - членах ЕС и ЕАЭС. Исследованы актуальные вопросы управления приоритетным сектором экономики на внутреннем и внешнем рынках продовольственных товаров. Проведен экономический анализ отрасли по каждой отдельно взятой стране. Изучены вопросы, связанные с импортом и экспортом произведенной продукции. Приведены примеры деятельности ведущих товаропроизводителей.

Key words: food industry, meat processing, dairy and bakery production, food products, population, foreign trade, domestic, foreign markets.

Түйінді сөздер: тағам өнеркәсібі, ет өңдеу, сүт және нан пісіру өндірісі, тағам өнімдері, халық, сыртқы сауда, ішкі, сыртқы нарықтар.

Ключевые слова: пищевая промышленность, мясоперерабатывающее, молочное и хлебопекарное производство, продукты питания, население, внешняя торговля, внутренний, внешний рынки.

Introduction. Food industry - the largest component of the national economy, with more than forty individual industries that manufacture food products such as readymade and semi-finished products.

There are two main categories of food:

- first - it is those industries that work with imported raw materials and focused on

railway junctions, ports of entry of products, large industrial centers. Products manufactured by them, has a high transportability;

- the second category are industry focused on raw materials and the consumer.

Most of the food industry belongs to the processing industry. However, there are companies that are included in the mining in-

dustry: the production of salt, fish, and several species of edible wild plants, the extraction and bottling of mineral water.

For the processing of raw materials in the food industry uses a variety of ways. They are required to ensure complete safety of use for human health food, improve their nutritional value, taste and product quality. Currently there are a number of food products that are not suitable for use in natural form, because they contain hazardous to human health components, or poorly absorbed. Conventional production technologies do not provide full safety of ready-to-eat foods. However, the change processing can significantly improve food quality, greatly extend the shelf life.

Great success has reached the food industry in developed countries. Among them there are some that are famous for its tradition in the production of high-quality food production, or stand scales. Consideration of current market conditions and search for trends in the processes taking place in the global food industry may be of practical interest.

Material and methods of research. At present, it makes sense to study the world experience of the food industry for the expansion of foreign economic relations.

To conduct a study of the current state of the food industry in the countries of the European continent: Denmark, Finland and Germany, the abstract logistic method, the method of generalization, analysis and comparison, economic and statistical methods were used.

The information base was used by the statistics committee of the Ministry of Economy of the Republic of Kazakhstan, data from the Finnish food industry associations, the American analytical agency "Business Insights", the German Federal Food Industry Union, and the works of domestic and foreign scientists regarding the development of the food industry were used. An analytical review of the current state and development of the food industry in foreign countries was carried out. Topical issues of managing the priority sector of the economy both on the domestic and foreign food markets are shown. An economic analysis of the industry was carried out for each individual country. Issues related to the import and export of manufactured products were studied. The analysis of the production activities of the largest companies - leading producers. Identified problems that hinder the development of food production. The problematic issues of the functioning and sustainable development of industry enterprises are identified [1].

Results and discussion. Food processing industry. Danish food industry has a high level of mechanization and quality standards. By the volume of food production per capita country takes 1st place in the world. The industry employs 170 thousand. People, and its products are available in 210 countries around the world [lk. 1].

Food safety and quality are key elements in the production of food. Food safety standards are maintained effective control over the production system at all stages.

Among the largest producers, related to the number of transnational corporations, can be identified:

- ♦ "Danish Crown" - meat and meat products;
- ♦ "Arla Foods" - milk and whole range of dairy products;
- ♦ "Carlsberg" - the production of beer and soft drinks.

Meat-processing concern "Danish Crown" is the largest enterprise in Europe and the third in the world. Its turnover in 2019 exceeded 9 billion dollars.

The main concern products are pork, beef, small quantities of poultry meat and meat products and prepared meat products. The largest markets are the European Union (60% of total exports), Japan, USA and South Korea.

Denmark is a major producer and exporter of processed milk products and dairy products. Exports of butter in the past year exceeded 240 million dollars. The largest buyers of this product are traditionally the UK and Middle East countries. Exports of cheese in 2019 increased by almost 18% and amounted to 2.1 billion dollars. Largest markets - Germany, Saudi Arabia, Japan and the United States.

Exports of cheese to Russia in 2013 reached a record high more than 10 thousand tons in 2015 deliveries of cheese to Russia amounted to only 600 tonnes (lactose-free varieties) against 14.1 thousand tons in the same period in 2014. In 2018-2019 deliveries of cheese to Russia is not carried out.

Export canned milk (milk fat content varying degrees, dairy mixture for children, etc.) in 2019 was in excess of 820 million dollars.

Today, there are only 152 milk processing enterprises in Kazakhstan, 8 of them are large, 144 are medium-sized and mini-shops [2].

The leading place is occupied by the concern "Arla Foods" in the processing of milk, which controls 98% of the market of dairy products. Among the largest dairy concerns of the world it occupies 6th place. Has production plants in 13 countries,

including in Russia, sells products in more than 100 countries worldwide.

The main types of activity of the concern - is the production and export of milk and milk products, including cheese, butter, milk powder, all kinds of milk proteins, lactose, caseinates, children (dairy) food, breast milk substitutes and others.

"Carlsberg" Concern is among the five largest brewing concerns of the world. It accounts for 7% of world beer production. 92 Group companies located in 48 countries (including 10 in Russia), employs more than 45 thousand. Every year Carlsberg produces more than 135 million hectoliters of beer and 22 million hectoliters of soft drinks. Concern products are sold in more than 150 countries worldwide.

The largest market for the "Carlsberg" is Russia, where the concern (along with belonging to it "Baltika" company) accounted for 34% of beer sales, more than double the share of its main competitors - "Heineken" and "SABMiller" together.

Production of food ingredients. Production of food ingredients (stabilizers, emulsifiers, sweeteners, etc.) is one of the most successful "niches" Danish industry. It should be noted that the Danish companies produce ingredients exclusively from natural raw materials.

The industry turnover in 2019 amounted to 5.4 billion dollars. Over 98% of production is exported. The Danish companies in the industry all over the world 18 thousand people are employed, including in Denmark - 6.2 thousand people.

According to the American analytical agency "Business Insights", the share of Danish producers on the world market of ingredients for the food industry is 14%.

Using Danish ingredients produced 50% of ice cream and 25% of all bakery products in the world. The company "Danisco" and "Novozymes" successfully deliver their products to the Russian market, providing nearly 50% of its needs.

The general condition and development trends in Finland. The food industry in Finland is the fourth largest in the industrial production. According to the Food Industry Association (ETL), withovokupny output in the food industry is 11.2 billion euro. The total number of people employed in the industry - 38 thousand people. Of the 2 000 enterprises in the food industry, 62% are mikropredpriyay category with the number of employees up to 5 people [3].

The major sectors of the food industry in Finland are meat processing, dairy and bakery

production. Almost all enterprises in the industry have a high degree of mechanization and automation of technological processes, along with a wide application in the production of the latest scientific advances and technological developments. For food production companies employ about 82% of domestic raw materials.

Foreign trade of food and agricultural products. The volume of exports of food and agricultural products in 2019, according to the Customs of Finland, increased by 11% compared to 2018 and amounted to 1.6 trillion euros (1.5 trillion euros in 2018). The main export products of the food industry in Finland remained alcoholic beverages 151.2 million euros (139.3 million euros in 2018) with a significant proportion accounted for by exports «Finlandia Vodka», the company Altia. Butter and other milk fat was at 137 million euros (+ 26%), fresh fish 122.4 million euros, dry milk at 87.5 million euros (+ 13%), products of sugar chemistry 85.6 million evros, other dairy products - 68.8 million euros (+ 2%), pork - 59.9 million euros (-8%), chocolate - 60.6 million euros (+ 1.5%), oats - 56.9 million euros (+ 2.5%). Other products, including food, cereal, baked goods and sweets, were exported in the amount of 694.2 million euros.

The share of EU countries in the grocery Finland's exports increased to 63% in 2019 – exports amounted to 1.02 trillion euros (figure 1).

The most important export country remained Sweden 293.6 million euros (299 million euros in 2018), in second position - Estonia - 144 million euros, the third position is preserved for Russia - 119.1 million euros. Followed by France - 96.8 million euros, Germany - 75.2 million euros, Denmark - 71.3 million euros, Poland - 60.5 million euros, the Netherlands - 55.4 million euros, Great Britain - 51.9 million euros, Lithuania - 43.8 million euros.

The increase in food exports - one of the main objectives for Finland's foreign trade. The food industry as a whole provides a Finnish demand, but growth manufacturing industry suggests the orientation for export.

According to Customs Finland and Import of food and agricultural products in Finland in January-December 2019 amounted to 4 688.0 million euros, which is 4.5% more than in 2018. Internal food market by almost 80% in the country is provided by domestic production. Except for such products as coffee, tea, cocoa, fruits and others. The main import partners are, as before, remains the European Union - 73.7%.

Рынок продовольственной продукции

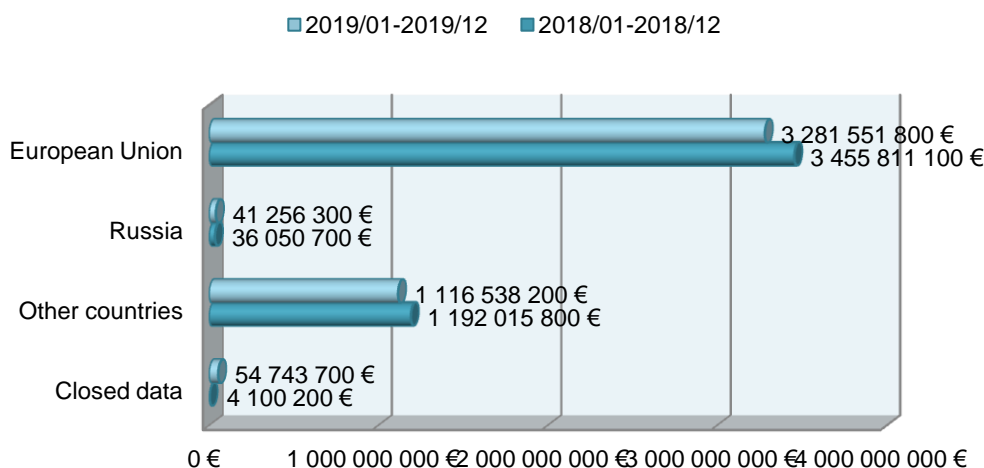


Source: Food Industry Association of Finland

Figure 1- Exports of food and agricultural products from Finland by region and country

Imports from Russia to Finland food and agricultural products, according to the Customs of Finland remained small with a share of 0.7% in total imports, down from 41.3 mil-

lion euro in 2018 to 36.1 million euro in 2019. The main band was imported raw material for fodder (figure 2).



Source: Food Industry Association of Finland

Figure 2 - Import of food and agricultural products in Finland by region and country

The largest companies in the food industry in Finland. 20 large companies, thereby increasing milk production efficiency and competitiveness) produces about 80% of all products. In one of the largest Finnish companies in the food industry include: Valio, Arla (production of dairy products and ice cream), HKScan, Atria, Snellman (production of meat products), Fazer (production of confectionery and bakery products), Paulig (production of organic coffee, spices), Raisio (production functional products food products from cereals and animal feed), Altia (production of alcoholic beverages), Vaasan (bakery products), Appetit (production of frozen vegetable and fruit mixtures), Saariöinen (ready meals, canned vegetables, meat products – since 2014 part of the company "Atria"), Hartwall, Olvi (production of low-alcohol and non-alcoholic beverages), Suomen Nestle (food concern), NordicSugar

(sugar production), Polittimo (food ingredients), Myllyn Paras (production flour, cereals, dough, pasta and confectionery).

The vast majority of the food industry in Finland (260 members, including collective) united in the Association of food industry (the ETL), in the field of its activity in about 600 companies, 75% of them - it's small and medium businesses. The main function of ETL Association has for more than 60 years, is to create conditions for the normal functioning and sustainable development of the industry [4].

The current state of development of food industry. According to the Federal Association of Food Industry (BVE) for 2019, the food industry is the third largest industry in Germany, which employs about 6 085 enterprises (+2.4%), where approximately 600 thousand people are employed.

Рынок продовольственной продукции

The total turnover of the food industry in Germany in 2019 grew by 5.7% to 181.0 billion euro (2018 - 171.3 billion euro), turnover in the country amounted to 120.6 billion euro (in 2018 - 114.8 billion euro), the external trade turnover amounted to 60.4 billion (+6.9%, in 2018 - 56.5 billion euro), of which the EU accounts for 48.1 billion euro (+8.4%, in 2018 - 44.4 billion euro), countries outside the EU receive 12.3 billion euro (+1.2%, in 2018 - 12.1 billion euro). The share of exports amounted to 33% of total turnover.

In 2019 marked the growth of the food industry, the positive sales trends have stimulated the growth of food production. German Food Industry at 90% containing small and medium businesses. The seasonally and calendar effects Q2. 2019 production increased by 2.3%. The company's turnover grew by 29.9 billion euros. In the summer months 2019, exports grew by 9.7 billion euros. The production capacity of the industry, adjusted for seasonal fluctuations and working in the summer months in 2019 increased by 1.7%.

Positive impact on the increase in sales of food industry by the growth of consumer prices. The price level for food in Germany, 8% higher than the EU average. The increase in production costs and international competition increasing pressure on manufacturers, because prices are rising, but in the long term, they remain stable. At Q2 and Q3 2019 CPI food prices rose 2.2% year on year in Q2 2019, and by 2.9% in Q3 2019. Meanwhile, the overall cost of living is from April to September 2019 increased by approximately 1.7%. During this period, there is a seasonal fluctuation of prices for various food products (table 1).

In Q2 and Q3 2017, the consumer price index for food increased by 2.2% year-on-year in Q2 2017, and by 2.9% in Q3 2017.

In the domestic market prices in Q2. It increased by 4.7% and 4.6% in July and August of 2019, compared to the same period the previous year. In the export sector, the price level increased by 3.8% in Q3 2019. In Q2 and Q3 2019 posleovala downward trend in prices for some food items and drinks to -4.5% and -11.3%, respectively [5].

Table 1 - Price dynamics in the II and III quarters of 2019

| Growth in consumer prices for the group of goods | II q. 2019 change from II q. 2018 | III q. 2019 change from III q. 2018 |
|--|-----------------------------------|-------------------------------------|
| Bread and flour products | 0.3% | 0.4% |
| Meat, meat products | 1.7% | 2.5% |
| Fish and fish products | 3.7 | 3.3% |
| Dairy products and eggs | 8.5% | 12.8% |
| Edible fats and oils | 20.4% | 30.5% |
| Fruit | 1.1% | 0.6% |
| Vegetables and potatoes | -2.1% | -5.0% |
| Sugar, marmalade, jam, honey, syrup | 0.2% | 0.4% |
| Coffee, tea, cocoa | 2.7% | 3.3% |
| Mineral water, juices, soft drinks | 0.7% | 0.2% |
| Alcohols | -0.1% | 0.1% |
| Wine | 0.5% | 0.5% |
| Beer | 0.5% | -0.1% |
| Note: data of the Federal Association of the food industry | | |

Food industry in Germany provides daily up to 82 million. People of high quality and safe food. On the economic development of individual sectors of the industry is influenced by various factors.

According to the association of German meat industry meat industry in Germany continues to work in difficult economic conditions. Characteristic is the decreasing demand for pork in the country and in the EU. EU pork exports to third countries decreased by 9% last year. The reason for this was the significant decline in demand from China.

According to the Association of the German Confectionery Industry [four] for 8 months of 2019 in the German confectionery

turnover amounted to about 8.8 billion euros, which is 0.7% less than the same period last year. Sales of confectionery products decreased by 0.6% and amounted to about 1.1 mln. tons. As the development of the domestic market, the overall situation with the export of confectionery is still positive. According to the Federal Statistical Office, the export volume of confectionery products in the first half of 2019 increased by 1.2% and amounted to about 980 000 tonnes. The value of exports increased na1,1% and amounted to more than 3.6 billion euro. Especially strongly developed export volume of chocolate products, cocoa and chocolate intermediates.

According to the association of German poultry industry [five] with the first half of 2019 about 478.6 thousand was made on German poultry. tons of chicken meat, which is 0.2% less than in the same period in 2018 According to experts, the consumption of poultry meat in 2019 as a whole increased by 2% [6].

In recent years, the development of trade dynamics in the EU Member States and the EAEC has a positive dynamics in the economic valuation of economists observed a positive impact of economic integration on intra-industry trade [7].

Conclusion.

1. Thus, in today's economy, the value of different approaches in the management of the food industry of European countries quite significantly as the industry's management idea is to get the final result of the activity of enterprises cost-effectively and with the greatest impact at all stages of production and marketing of finished products [8].

2. The most important role in the food industry are transnational corporations (TNCs). The largest TNCs are based in developed countries.

3. One of the characteristic processes in the world food industry is the process of globalization [9].

4. High importance of the food industry for the world economy.

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