Development of Agribusiness in Kazakhstan in the Conditions of the EAEC (on Materials of the Food Industry)

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This article reviews the problems of developing agribusiness in the Republic of Kazakhstan in the conditions of deepening integration processes. The author conducted analysis of the situation in the food and processing industry sectors, as well as the results of the integration processes in the agricultural sector of the CU and EAEC countries. The problems affecting the increase in the volume of processing agricultural raw materials and the development of food industry of the Republic of Kazakhstan were identified, and possible measures to eliminate them were highlighted. The author concludes that the positive momentum in ensuring food supply security and the creation of a single market would be to increase integration within the EAEC.

Key words: Integration, the Customs Union (CU), the Single Economic Space (SES), Agribusiness, the Eurasian Economic Community (EAEC).

The role of agribusiness in ensuring food supply security, employment growth and economic development of the Republic has repeatedly been stressed by the head of state, Nursultan Nazarbayev, in his address to the nation.

Extensive work was carried out in the Republic of Kazakhstan on studying and addressing problems in the agribusiness, which resulted in the adoption of a set of decrees aimed at improving the state agrarian policy and increasing the efficiency of agribusiness undertakings.

This issue is of particular relevance in the conditions of formation of a coherent agricultural policy and the common market for agricultural products and food with the partner states to the Republic of Kazakhstan in the Eurasian Economic Community (EAEC).

In conditions of deepening integration processes, as well as due to changes in the internal environment of the Republic of Kazakhstan connected with the growth of the population and increasing and changing consumption patterns towards more quality and diverse products, one of the priorities of the agribusiness development is issues of agricultural processing and development of food industry.

At the moment, the food industry of the Republic of Kazakhstan is developing quite consistently, but it requires further enhancing the quality, volume and exporting potential.

At an extended meeting of the Government of the Republic of Kazakhstan in August 2014, President noted that the issues of processing in the agricultural area should be addressed. At present, less than half of the total production of the domestic agriculture is processed

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further. At the same time, the production capacities are used only by 30% on average[1].

Enormous opportunities for the development of the food industry are opened in the context of international economic integration community EAEC, an agreement on the creation of which was signed on May 29, 2014 and came into force on January 1, 2015. At present, the EAEC includes four states: the Republic of Kazakhstan, the Russian Federation, the Republic of Belarus and the Republic of Armenia.

In accordance with the coordinated agricultural policy of the member states of the Customs Union and the Single Economic Space, which was approved by the Supreme Eurasian Economic Council and the Treaty on the EAEC, a concept was developed, in particular aimed to address issues of the balanced development of production and markets of agriculture and food while ensuring fair competition, equal access to the common agricultural markets, harmonization of requirements related to the circulation of products, as well as to protect the interests of producers in the domestic and foreign markets[2].

In the conditions of the Eurasian integration of the Republic of Kazakhstan, it is necessary to use its advantages to develop the regional economy through the development of industrial policy in the region, taking into account the opportunities offered by cooperation within the EAEC, including through the expansion of markets for its products on the territories of the partner states.

However, the issues of the validity of the forms, methods and tools for implementing efficient agro-industrial policy still remain controversial. A clear definition of the target long-term objectives of development and ways to implement them is essential to ensure the sustainability of agribusiness of the republic[3]. These circumstances led to the need for an objective assessment of the current state of agriculture, food and processing industry in the region, feasibility of the priorities, and the definition of the target indicators of development of these industries in the long term.

Methodology

Agribusiness is the most important system field of the economy of the Republic of Kazakhstan, which forms the food supply and environmental security, demographic, employment and settlement potential of the country, and has a dramatic impact on the health and quality of life[4].

Food and processing industries operate within a single agribusiness in the country, being its III-rd field together with the sectors of the I-th filed that produce industrial means of production, II-nd field – agriculture, the main supplier of raw materials for processing and food production, and IV-th field – servicing structures that deliver products from producer to consumer[5].

Their dynamic and efficient development is possible only due to proportionality and the optimal combination of interconnected sectors in all fields of agribusiness, focus of the participants on the end result, their economic interest in the joint production, and mandatory combination of government regulation with self-regulation. This requires an analysis of the situation in the food and processing industries from the perspective of a systematic and comprehensive approach, which will allow a more objective approach to identify the accumulated problems, set goals that require urgent solution, and justify the most effective ways to address them.

Methodological basis of the study were general scientific methods of system analysis of complex social and economic objects that allow to study the characteristics of the territory development in the conditions of market economy. Comparative, regulatory and abstract logic kinds of analysis that allow to conduct a comprehensive research are used as the main methods.

RESULTS

Attempts to create various integration formations within the ex-Soviet area were started immediately after the collapse of the USSR. The first of these was the CIS, which united most of the former Soviet republics. But it did not become the real form of economic integration, limiting to resolution of issues in the field of defense, international relations, migration exchange, education, transport, etc. that were of mutual interest for the post-Soviet states. The CIS, which originally included 12 of the 15 republics, appeared in fact too heterogeneous for economic integration.

It became apparent that it was necessary to create a more narrow yet efficient integration association. Thus, the Customs Union was created in 1995, which included Russia, Belarus and Kazakhstan. However, the Customs Union Treaty dated January 20, 1995, which was joined by Kyrgyzstan in 1996 and Tajikistan in 1999, as well as the Treaty on the Customs Union and the Single Economic Space signed by the five countries in 1999, have never come into force. Therefore, the 90s can be described as the period of search and hands-on testing by trial and error of the most efficient Eurasian integration model[6].

The difficulties of transition to market relations in the Republic of Kazakhstan in the 90s were complicated by violations of economic relations, narrowing economic space, failure to fulfill contractual obligations and, as a consequence, a drop in production. The food supply problem became particularly acute at the time, and no real progress in other areas of economic and social development could be achieved until it is solved.

However, the chosen methods of state regulation of agriculture failed to achieve the desired results[7]. Sectors in the agribusiness have not been formed into a single economic unit, so periods of short-term ups were replaced by long downs and couldn't cope with the primary function of ensuring the country's food supply.

Table 1. Volume of agricultural products output by the CU and SES member states in 2005–2013, USD bln [11]

Countries	2005	2008	2009	2010	2011	2012	2013	2013/2005
Belarus	6	11.7	9.6	12.1	9.9	12	11.9	198.3%
Kazakhstan	5.7	11.7	11.1	9.8	15.6	13	16	280.7%
Russia	48.8	99.2	79.4	85.2	111.1	102.7	119.1	244.1%
Total within the CU and SES states, USD bln	60.5	122.6	100.1	107.1	136.6	127.7	147	243.0%

Table 2. Volume of food production in the CU and SES states in 2008-2013 [13]

Indicator	2008	2009	2010	2011	2012	2013
CU and SES production of food (including beverages) and tobacco,USD bln	124.1	104	124.9	140.9	150	157.7
Belarus, USD bln	10.3	9.4	11.2	10.9	13.6	15.1
Kazakhstan USD bln	5.2	4.3	4.7	5.6	5.8	6.4
Russia, USD bln	107.1	89.1	107.5	122.7	128.8	134.1

Low productivity of fields and farms, inefficient use of production facilities and large production losses were accompanied by rising costs in the main agriculture production. Costly nature of the economy of the collective and state farms has led to the fact that the real expenses of many farms exceeded the purchase prices and eventually worsened their financial situation dramatically.

The collapse of large farms has led to a significant reduction in livestock. So, between 1990 and 1999, the cattle stock decreased by 2.4 times, sheep and goats stock – by 3.7 times, pigs stock – by 3.3 times, poultry stock-by 3.3 times[8]. Realization of meat in carcass weight decreased by 2.7 times, eggs-by 2.8 times, milk- by 1.6 times.

Due to lack of working capital for the purchase of raw materials and reduction in the supply of raw materials by producers of agricultural products, the output of main types of food and beverages has fallen. So, between 1990 and 1998, canned meat production decreased by 72.4 times, butter – by 18 times, sausages – by 12.6 times, dairy products – by 12 times, cheese – by 9.6 times, marketable fish products – by 5.3 times[9].

The total turnover of agricultural products of the Republic of Kazakhstan with the CIS countries showed a negative trend for both export and import operations. Agricultural exports to the CIS countries for 1995-1999 fell by 49.3%. Its share in total agricultural exports decreased from 54.9% in 1995 to 26.1% in 1999.

Over the same period, the volume of imported agricultural products from the CIS countries decreased by 39.9%. The share of agricultural products from CIS countries in total imports decreased from 69.7% in 1995 to 43.3% in 1999.

The most important step of the Eurasian integration was the creation of the EurAsEC – an international organization with a clear functional structure, effective mechanisms and clear goals – on the basis of the Customs Union and the Single Economic Space in 2000.

EurAsEC received international status and became a UN observer. Efficient mechanisms of cooperation in solving the most pressing problems are developed in the community. Thus, the Community states took successful joint measures to overcome the consequences of the global financial and economic crisis.

A significant breakthrough in the Eurasian integration was made in 2010: the CU of Belarus, Kazakhstan and Russia came into force on January 1, 2010 and has been operating in full mode under all international standards since mid-2011 [10].

During 2010, 17 framework agreements were developed and signed that form the Single Economic Space (SES). The agreements provided for a coordinated policy in the fields of macroeconomic management, finance, investment, competition, regulation of natural monopolies, subsidization of industry and agriculture, public procurement, technical regulations, migration, protection of intellectual property, etc.

The three countries ratified the package of agreements in 2011, and the practical phase of the SES creation began on January 1, 2012 and is expected to come into full force in 2015.

Development of integration processes in the agricultural sector that ensures food supply and economic security has already produced tangible results: the increase in agricultural

Table 3. Food production in the CU and SES states in 2008-2013, thousand tons

Production	2005	2008	2009	2010	2011	2012	2013	increase/decrease 2013/2005
Processed meat products	2,413	3,633	4,288	4,859	5,245	5,847	6,436	166.72%
Tallow oil	358.7	386.6	356.4	320.6	337.9	341.1	334.6	-6.72%
Vegetable oil	2,402	2,756	3,099	3,177	3,250	4,418	4,133	72.06%
Milk production	11,148	12,044	12,165	12,814	12,833	13,623	13,867	24.39%
Production of sugar	3,993	7,090	6,223	5,930	8,382	6,358	6,086	52.42%

Table 4. Production of major food products per capita consumption in 2013, kg/person [15]

Production	Belarus	Kazakhstan	Russia	CU and SES
Processed meat products	106.3	12.7	35.3	38.5
Tallow oil	10.5	0.8	1.5	2
Vegetable oil	27	16.2	25.1	24.3
Milk production	193	28	80.6	81.6
Sugar	90.1	19.5	34.2	35.8

Table 5. Indicators of food exports of the Republic of Kazakhstan

Indicator	2011	2012	2013	Difference 2013/2011, +/-
Exports of food and agricultural raw materials of CU and SES, total, USD mln.	5,838.4	7,026	8,204.8	2,366.4
of which exports of Kazakhstan, USD mln.	129.1	216.6	473.5	344.4
relative share of Kazakhstan in the exports of food products to the CU and SES countries, %	2.2%	3.1%	5.8%	3.6%
Volume of Kazakhstan's exports of food and agricultural raw materials to third countries, USD bln.	1.7	2.8	2.2	0.5

production in CU states from 2005 to 2013 amounted to more than 20%, including the increase in the total agricultural output in Republic of Kazakhstan by 2.8 times since the creation of the CU (Table 1).

Production of food and beverages is an essential part of Kazakhstan's economy generating USD 6.4 bln, which is equivalent to approximately 25.5% of its products. According to the Agency of the Republic of Kazakhstan on statistics in the food and processing industries, the number of operating enterprises is 1,370, of which about 60 are large.

The main share in the structure of food production is taken by grain processing industry (19%), milk (16%), bread and bakery (15%), meat processing (14%), fruits and vegetables (9%), fat and oil (9%) and other sectors (17%).

The sector employed about 19% of the total manufacturing workforce. Within the food industry and the agricultural sector alone, there are a significant number of companies involved in the production: 10,860 involved in agriculture; 933 – in fishery; 2,683 – in food production, and 586 – in the processing of non-food agricultural raw materials (in the textile and tobacco industries). The vast majority of companies involved in the food industry are small and medium enterprises, which represents approximately 30% of the total number of industrial enterprises[12].

The existing production capacities allow to deeply process 160 tons of cattle, 280 tons of milk, 640 tons of cereals, 410 tons of sunflower per day. However, the analysis of available capacities of agricultural processing enterprises shows that capacity use remains low and significantly behind those of other CU and SES member states (Fig.1).

The main reasons for the low use of production facilities of the industry are:

a) Lack of quality agricultural raw materials;
b) Undeveloped system of agricultural logistics;
c) Inefficient measures to crate distribution network for domestic products;
d) High degree of depreciation of fixed assets in the processing and food industries; and
e) Poor development of related industries.

Positive dynamics of total production of food (including beverages) and tobacco is observed since 2010, after the creation of the CU (Table 2).

The main products of Kazakhstan's food and agricultural industry are flour, macaroni, rice, meat, dairy products, mineral water and beverages, sugar and confectionery products, oils and fats.

Positive dynamics of food production in the CU and SES member states is observed over the reporting period in real terms (Table 3).

The ratio of the absolute country indicators does not reflect the total role of a country in the volume of agricultural production. To evaluate the country's self-sufficiency in food, the relative indicator is used – production of major food products per capita[14].

Indicators of the production of major food products given in Table 4 suggest that the Republic

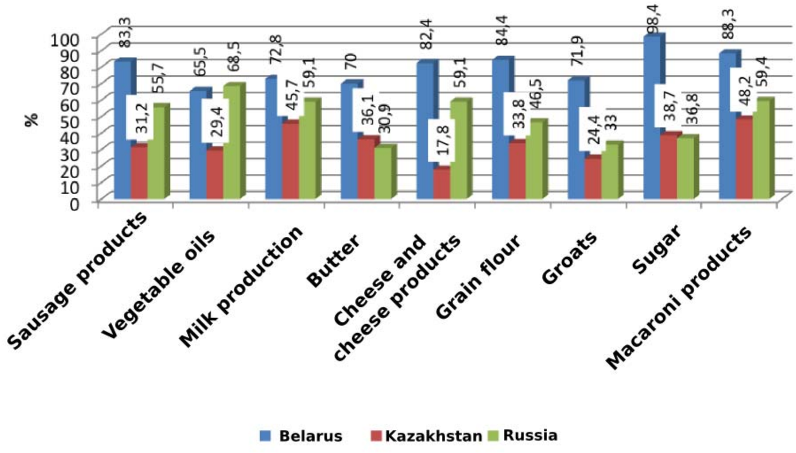

Fig. 1. Level of annual production capacity for the output of certain industrial products by CU member states in 2013

of Kazakhstan is inferior to its partners on most indicators.

The first place is taken by agribusiness of the Republic of Belarus. The country has secured a numerical superiority in per capita terms by almost all types of products.

Monetary value of bilateral trade in agricultural products and food products between the CU and SES member states increased by 64% from 2010 to 2013. The Community countries account for 26.3% of food exports and 48.3% of imports in terms of value.

Considering the dynamics of foreign trade in food of the Republic of Kazakhstan in the period of the Customs Union and the SES operation, you must also draw parallels with the general indicators of foreign trade with third countries. First of all, it can be noted that the export of food products from Kazakhstan to the Customs Union countries has significantly increased over the period of its operation (Table 5).

In 2013, exports of food and agricultural raw materials from the Republic of Kazakhstan to the CU and SES countries have increased by 2.1 times compared to 2012. Kazakhstan has increased its share in the exports of food products from 2.2% in 2011 to 5.8% as of the year-end 2013.

The average annual growth rate of exports of food and agricultural raw materials to the CU countries over 2011-2013 amounted to 93.9%. The comparable figure of Kazakhstan's exports of food products to third countries amounted to 21.6%. That is, Kazakhstan's trade was almost four times more active within the Customs Union than with external partners. Thus, we can conclude that Kazakhstan's membership in the Customs Union and the SES has a significant impact on the volume of its exports. Kazakhstan is mainly able to export food and agricultural raw materials, but the share of this product group in exports remains low.

After creating the integration association, the volume of imports of food products and agricultural raw materials from the CU to the Republic of Kazakhstan also increased. Comparing the shares of the CU countries in the Kazakhstan food imports, it can be seen that the role of Russia in the food market of Kazakhstan has increased significantly: while in 2009 the share of imported products and agricultural raw materials from Russia accounted for 43% of the total volume, this figure reached 67, 9% by the end of 2013[16].

DISCUSSION

Despite the relatively stable economic growth in recent years, some countries of the Eurasian region are experiencing difficulties with food supply security due to fluctuations in agricultural production and impact of global economic trends.

Unlike agricultural production, industry of its processing in the Republic of Kazakhstan faces more challenges in development. First of all, this is due to the narrowness of the domestic market and the natural desire of other countries to purchase raw materials in foreign markets for their subsequent independent processing and sale of finished products[17]. In this regard, the increased competition is recently observed in the food market – this has particularly emerged after Kazakhstan joined the Customs Union, which has simplified the circulation of raw materials and goods between the CU member states.

The priority objective of the development of the processing industry of the Republic of Kazakhstan is to reduce production costs and increase competitiveness of its products in domestic and foreign markets. The state should only ensure conditions for the development of processing industries, i.e. it is necessary to raise them to a level where they become self-sufficient and competitive enterprises in the future without government support.

The analysis shows that the main challenge to increase in the volume of agricultural processing and improvement in the use of facilities for products, which share of imports in domestic consumption remains high, is their weak competitiveness, usually associated with high production costs.

To achieve this goal, the following tasks must be accomplished:

1) Provide processing plants with raw materials;
2) Ensure a high-tech production of finished products; and
3) Ensure distribution of finished products.

At the same time, processing of agricultural products includes a wide range of areas, and it is virtually impossible to support all areas with limited budget. In this regard, it seems appropriate to support only the priority areas in order to ensure the effective use of budget resources and maximize returns.

Priority areas of the food industry of the Republic of Kazakhstan include:

a) Milk processing (production of butter, cheese, milk powder);
b) Meat processing (production of sausages, meat and vegetable canned food);
c) Production of oil and fat products (margarine and vegetable oil);
d) Production of macaroni and cereals;
e) processing of fruits and vegetables;
f) Production of sugar; and
g) Processing of farm animal skins.

Problems that hinder the development of the processing sector of agribusiness include the following:

a) poor quality of the raw material (milk and meat) in smallholdings and their geographical remoteness;
b) seasonal nature of production and the uneven flow of raw materials during the year;
c) lack of raw milk and the high cost of raw milk because of the high share of production on farms and smallholdings;
d) high proportion of obsolete and worn-out equipment;
e) lack of working capital; and
f) almost complete lack of equipment for primary processing of hides.

According to the Minister of Agriculture of the Republic of Kazakhstan A.S. Mamytbekov, the state should only ensure conditions for the development of processing industries, i.e. it is necessary to raise them to a level where they become self-sufficient and competitive enterprises in the future without government support. To do this, it is required to provide the processing plants with raw materials, as well as ensure high-tech production of finished products and distribution of finished products.

To support the development of milk processing, the Government of the Republic of Kazakhstan has planned to provide state support (investing subsidies and interest rate subsidies) to arrange 212 stations of milk collection by 2020, as well as to acquire 400 large milk tankers for milk collection from the 2,000 newly organized mini commercial dairy farms.

Another important processing industry in the country is meat, which also faces a number of constraints to the development, which is very similar to the problems of the dairy industry. This is a low quality of raw materials, seasonal nature of production and the uneven flow of raw materials during the year, geographical remoteness of smallholders; high proportion of obsolete and worn-out equipment; lack of working capital.

The problem of low-quality raw materials and territorial remoteness of smallholdings is expected to solve through the provision of state support for the purchase of 30 cattle trucks and 63 refrigerators by 2020 by meat processing companies or intermediaries for collecting meat from smallholders. The size of the investing subsidy will be 30%, while the remaining amount can be borrowed at the rate that is also subject to subsidy in the amount of 7%. 500 mln tenge is planned for these events. These measures will allow to collect about 600 thousand tons of meat by 2020.

Processing of fruits and vegetables is one of the priorities in Kazakhstan. The main objective of this area thus far is just displacement of imports. There are some common problems of worn-out equipment and lack of working capital, as well as the problem of the low percentage of processing fruits and vegetables (4%).

Problems of worn-out equipment and lack of working capital will also be addressed through investing subsidies in upgrade of the equipment in the amount of 30% of the investments and subsidizing the interest rates on loans and leases in the amount of 7%.

In addition, in order to increase the share of processing fruits and vegetables by 2020 to 13%, investing subsidies and subsidizing interest rates will be applied; it is also planned to encourage the construction of new enterprises. Additional allocation of 7.7 bln tenge for financial restructuring of processing enterprises in the above and other priority areas is also provided.

All these activities are included by the Ministry of Agriculture of the Republic of Kazakhstan into the master plan "Development of the processing industry"[18]. At the same time, a single comprehensive plan of activities aimed at improving the competitiveness of the manufacturing industry was drafted to organize and consolidate actions under the master plans[19]. According to the Ministry of Agriculture of Kazakhstan, implementation of measures of the comprehensive plan will significantly improve the competitiveness of domestic processing industry by reducing its costs and improving the quality, not only in domestic but also in foreign markets, thus significantly expanding export opportunities. In the near future, the comprehensive plan will be submitted for approval to the Government of the Republic of Kazakhstan.

Many experts agree that deepening integration process and closer cooperation with the CU and SES member states will contribute to the efficiency of agricultural and food production, use of resources and increased trade[20].

A new stage of the integration process started on January 1, 2015, with the start of the new integration association of the Eurasian Economic Community (EAEC), the treaty about the creation of which was signed by the presidents of Belarus, Kazakhstan and Russia in Astana on May 29, 2014.

In accordance with Article 94 of the Treaty, member states shall conduct a coordinated agricultural policy, which implies the use of regulatory mechanisms provided by union agreements in the field of agribusiness.

Implementation of the coordinated agricultural policy provides the solution of the problem to ensure balanced development of production and markets for agricultural products and food products.

Implementation of the coordinated agricultural policy in the framework of the EAEC will be carried out due to[21]:

a) Preparation of joint forecasts of development of agribusiness, supply and demand for agricultural products and food products;
b) Mutual provision by the EAEC state member to each other and to the Commission of the plans (programs) of production development for each of the sensitive agricultural products, the list of which is formed on the basis of proposals by EAEC member states and is approved by the Commission Council;
c) development and fulfillment of obligations in the field of state support for agriculture;
d) regular consultations of representatives of the EAEC state members, including on sensitive agricultural products, at least once a year;
e) joint scientific innovation in agriculture by the EAEC member states, including in the realization of international programs by the member states;
f) development and implementation of unified requirements regarding the conditions of import, export and circulation within the customs territory of the Union of breeding products, methods for determining the breeding value of breeding animals, as well as forms of breeding certificates (certificates, passports) by the EAEC member states; and
h) development and implementation of standardized requirements in the field of testing varieties and seed crops, as well as the mutual recognition of documents certifying the varietal and sowing seed qualities by the EAEC member states.

Conditions of establishment and functioning of the EAEC that provide non-implementation of restrictions by the member states in mutual trade are aimed at encouraging open competition in the common market. As a rule, open competition encourages producers to reduce production costs and improve product quality to take a strong position on the market. Norms of the EAEC Treaty are aimed at creating a level playing field, which should encourage manufacturers to lower prices for manufactured products. Due to the economic integration, the citizens will have a greater choice of quality goods and services.

CONCLUSION

Integration is an efficient tool for economic growth and a prerequisite for the full implementation of the new opportunities that were formed due to accomplished political "disengagement" of post-Soviet states. Improving the welfare of the country is impossible without creating a capacious food market. The positive part in the creation of such a market is strengthening of the integration processes within the EAEC. Common principles of technical regulation, common system of veterinary, sanitary and phytosanitary security allow to ship the products across the territory of the Union member states under uniform requirements and on equal terms. All this will create new production in the territory of the EAEC, improve the competitiveness of the food industry products and lead to a gradual decline in prices for food products.

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