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TRENDS AND PRIORITIES CHANGE IN THE EUROPEAN AGRICULTURAL PRODUCTS MARKET

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ТЕНДЕНЦІЇ ТА ЗМІНИ ПРІОРИТЕТІВ НА ЄВРОПЕЙСЬКОМУ РИНКУ СІЛЬСЬКОГОСПОДАРСЬКОЇ ПРОДУКЦІЇ

Marketing research of agricultural market of Ukraine and European countries was conducted. The modern commodity structure of export (import) is analyzed. On the basis of the analysis of the current state of foreign trade development in Ukraine and the countries of Europe, the formation tendencies of the agrarian market conditions are substantiated. Positive market changes that will occur in the orientation of the domestic agricultural sector to the European market have been identified. In the article the directions and prospects of its integration into the world agrarian market are determined through the prism of increasing the competitiveness of Ukrainian agriculture. According to the analysis results of the development dynamics of domestic agricultural exports for 2005–2017, it is concluded that there is a tendency for its active growth. It is advisable to expect a positive trend in the future. Increasing export volumes and strengthening Ukraine's position in global agricultural markets require increased agricultural competitiveness and increased cooperation with countries around the world.

The theoretical bases of formation and development of the competitive agro-food production market are investigated in the article. The current state and peculiarities of the agro-food market development in Ukraine in the conditions of the existing competitive environment are considered. Given the current state of the domestic agribusiness sector of the economy, general macroeconomic development, the standard of living of the population, features of geographical location, the presence of environmental problems, as well as Ukraine's position in the system of international division of labor in the conditions of active course of globalization process, the concept of agro-food policy should be oriented to the solution tasks such as food security, sustainable rural development, strengthening the country's position on global agro-food market. The dynamics of export and import of agro-food products is analyzed. Proposals have been made on the effective formation and functioning of the domestic agro-food market.

Проведено маркетингове дослідження ринку сільськогосподарської продукції України та країн Європи. Проаналізовано сучасну товарну структуру експорту (імпорту). На основі аналізу сучасного стану розвитку зовнішньої торгівлі України та країн Європи обґрунтовано тенденції формування кон'юнктури аграрного ринку. Виявлено позитивні кон'юнктурні зміни, які відбуватимуться у разі орієнтації вітчизняного аграрного сектора на європейський ринок. У статті через призму підвищення конкурентоспроможності сільського господарства України визначаються напрями та перспективи його інтеграції у світовий аграрний ринок. За результатами проведеного аналізу динаміки розвитку вітчизняного експорту сільськогосподарської продукції за 2005–2017 рр. зроблено висновок, що спостерігається тенденція до його активного зростання. У перспективі доцільно очікувати посилення позитивного тренду. Збільшення обсягів експорту та посилення позицій України на світових ринках сільськогосподарських продуктів потребують підвищення конкурентоспроможності сільського господарства та нарощування співробітництва з різними країнами світу.

У статті досліджено теоретичні засади формування і розвитку ринку конкурентоспроможної агропродовольчої продукції. Розглянуто сучасний стан та особливості розвитку ринку агропродовольчої продукції України в умовах існуючого конкурентного середовища. З огляду на сучасний стан вітчизняного агропродовольчого сектору економіки, загального макроекономічного розвитку, рівня життя населення, особливостей географічного розташування, наявності екологічних проблем, а також позицій України в системі міжнародного поділу праці в умовах активного протікання процесу глобалізації, концепцію агропродовольчої політики має бути зорієнтовано на вирішення таких завдань, як забезпечення продовольчої безпеки, сталий розвиток сільських територій, зміцнення позицій країни на світовому агропродовольчому ринку. Проаналізовано динаміку експорту та імпорту агропродовольчої продукції. Здійснено пропозиції щодо ефективного формування та функціонування вітчизняного агропродовольчого ринку.

Key words: agricultural market, world market, European agricultural market, market players.

Ключові слова: аграрний ринок, ринок сільськогосподарської продукції, світовий ринок, європейський ринок сільськогосподарської продукції, суб'єкти ринку.

INTRODUCTION

Agriculture has historically played an important role in the development of the economy of Ukraine and the world. Not only is it intended to provide the population with food, to shape food security and food independence of countries, but in particular for Ukraine, it has high export potential, which enables Ukraine to effectively integrate into the world economic structures, increasing its own competitiveness. Agricultural development is capable of exerting a strong influence on the economic dynamics in Ukraine, given the significant prospects for its capitalization and the projected long-term upward trends in world agricultural markets.

It should be noted that the current global food market is primarily characterized by a shift in world supply and demand, price fluctuations, and a dynamic increase in food trade, taking into account the needs of the population and its income in different parts of the world.

For the Ukrainian agribusiness, the world food market is not only an important external market for its own products, but also serves as a strategic benchmark for

improving the level of resource use productivity and substantially increasing the production of competitive products. In the face of the changing global food market, Ukrainian producers have a number of sustainable and undeniable competitive advantages. These include, in particular, favorable natural, climatic and geographical conditions of agricultural production, high quality and environmental safety, as well as convenient logistic transport location. At the same time, one of the disadvantages of modern agrarian production is the preservation of the raw materials-oriented direction of its development, which causes a high dependence of the Ukrainian agricultural sector on the global food market and its price volatility.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

The research of market conditions and marketing processes in the agrarian market of Ukraine and European countries is devoted to the work of such scientists as: O. Borodin, V. Vlasov, S. Demyanenko, I. Kyrilenko, Y.

Table 1. Dynamics of export and import by Ukraine of crop production for the period 2005–2017, tons

Item	Element	Years						
		2005	2012	2013	2014	2015	2016	2017
Barley	Import	475	25203	10072	6902	5645	4128	8165
Barley	Export	3501800	2582018	2339530	4165877	4629500	4801693	4855317
Maize	Import	12839	49177	49559	54948	26403	32384	36515
Maize	Export	2795641	15630889	16729468	17556531	19048697	17275407	19394541
Rye	Import	8	392	184	148	28	16338	187
Rye	Export	80523	10487	15828	58894	22723	6143	25041
Sorghum	Import	135	998	754	362	762	356	412
Sorghum	Export	34926	125425	180398	195595	153035	93223	148273
Sunflower seed	Import	3101	17719	19770	15360	14030	24230	24829
Sunflower seed	Export	35598	282097	70209	73896	47690	196583	73230
Wheat	Import	7709	1411	1778	1792	2231	2507	3755
Wheat	Export	6009481	8679388	7762279	10543788	13451830	17920945	17314278
Potatoes	Import	2469	6267	5175	21840	1753	9774	3821
Potatoes	Export	144	7175	16288	16088	15346	5028	17697
Cabbages and other brassicas	Import	697	2309	3779	9858	2782	16006	7537
Cabbages and other brassicas	Export	339	4595	10217	2605	2382	2532	3546

Source: compiled by the authors.

Lopatinsky, B. Paskhaver, C. Lerman, W. Meyers and others. The results obtained allow them to form a new vision and place of the agrarian sector in the European integration and globalization processes. At the same time, since these processes are important for the national economy, it is appropriate and necessary to carry out further analysis on the formation of favorable market conditions for Ukraine in the development of foreign trade relations.

Alina Bukhtiarova, Arsen Hayriyan, Victor Chentsov and Sergii Sokol (2019) write that the agricultural industry is a strategically important component of the national economy, as it forms a significant part of the country's gross product, provides a significant portion of the export earnings and employment of millions of people. The level of agricultural development determines the state of food security of the population and the socio-economic situation in the country.

Leonid M. Taraniuk, Jianping Wang, Hongzhou Qiu, Yuriy Petrushenko, and Karina Taraniuk (2019) argue that in the face of constant fluctuations in supply and demand in the food market, many world leaders are paying attention to developing their logistics potential. On the one hand, it aims to increase the level of inter-state cooperation in the agricultural sector, which characterizes the processes of internationalization of agricultural products between countries. On the other hand, it can increase the efficiency of business process management in agricultural enterprises through intergovernmental partnerships and the introduction of innovative technologies. Leonid M. Taraniuk, Jianping Wang, Hongzhou Qiu, Yuriy Petrushenko and Karina Taraniuk (2019) study the increasing logistical potential of major agricultural countries in the world and evaluate it as an element of implementing a food control system, enhancing food security in many countries and adopting effective management decisions in the country in the field of agricultural logistics management.

Eter Kharashvili, Badri Gechbaia and Gela Mamuladze (2018) believe that one of the limiting factors of competition in the vegetable market is the low level of

product diversification. International market exporters demand a steady supply of large quantities of produce that vegetable producers cannot satisfy.

Despite the proliferation of scientific research, the question of identifying prospects for further Ukrainian agriculture integration into world agricultural markets requires much deeper research. The determination of the main guidelines for strengthening Ukrainian positions in the world agrarian markets under conditions of international economic integration is of particular relevance.

The purpose of the article is identification and justification of the agrarian market priorities in Ukraine in the context of the current state of foreign trade with European countries and general trends in the development of world agriculture.

RESULTS

The current prospects for innovative development of domestic agricultural production will be determined by the opportunities to use the benefits of its diversification both in terms of the commodity structure and in increasing its share that has growing demand in the world. At the same time, according to the structural analysis of the world food market, priority should be given to the development of commodity groups, where not only high added value but also deep processing is formed, which is extremely important for the national economy of Ukraine. These products generate high prices, as well as less dependent on the global environment and their volatility, are in stable demand and provide a significant share of foreign exchange earnings for the state.

The economic potential of the agricultural sector is the aggregate capacity of the economy, enterprises, farms to carry out production and economic activities, produce high quality products, goods, services that meet social needs, ensure the development of production and consumption. Based on this definition, the economic potential of the industry depends on the supply of its natural resources, means of production, labor and scientific and technical potential, accumulated national

Table 2. Dynamics of export and import of livestock products in Ukraine for the period 2005–2017, tons

Item	Element	2005	2011	2012	2013	2014	2015	2016	2017
Honey, natural	Import	63	2	23	22	53	17	118	57
Honey, natural	Export	3814	9874	13338	21674	36336	36013	56968	67907
Eggs, hen, in shell	Import	4127	3179	3464	4143	6999	10026	4447	5664
Eggs, hen, in shell	Export	1031	39043	29463	37487	56029	59291	50676	88607
Meat, cattle	Import	168	340	6	11	147	274	179	165
Meat, cattle	Export	44646	12965	16533	20213	15975	24094	24085	23014
Meat, chicken	Import	133688	50770	104157	61380	53724	55812	74505	106930
Meat, chicken	Export	101	7860		18881		26877		49711
Meat, pig	Import	30486	20707	60577	31070	3095	136	119	1025
Meat, pig	Export	164	2104	1822	187	7172	24131	2105	1498
Milk, whole fresh cow	Import	30	1757	3085	4957	1444	34	78	143
Milk, whole fresh cow	Export	1783	10895	4675	6555	5865	7663	9554	12507

Source: compiled by the authors.

wealth, as well as on the level of development of international relations. Ukraine's agro-industrial sector needs investment because it is a strategic area of the country's economy, which characterizes supply volumes and value of basic foodstuffs for the country's population, generates foreign exchange earnings from the state through exports, determines the status and trends of rural development.

Agriculture is the basis for the development of other sectors of the economy, providing food security within the country, addressing employment and stimulating the strategic development of the region.

The first objective problem for the Ukrainian village is the low competitiveness of goods and services compared to similar products of European countries. The competitiveness of European countries' goods is supported through the following mechanisms: technical standards, sanitary and phytosanitary standards, and financial support to the agricultural sector from the budget. A serious problem is the uneven distribution of goods between countries and regions. The most vulnerable is the agriculture of those countries that have not overcome the food crisis. The problem of low competitiveness must be solved both by the producers of agricultural products and

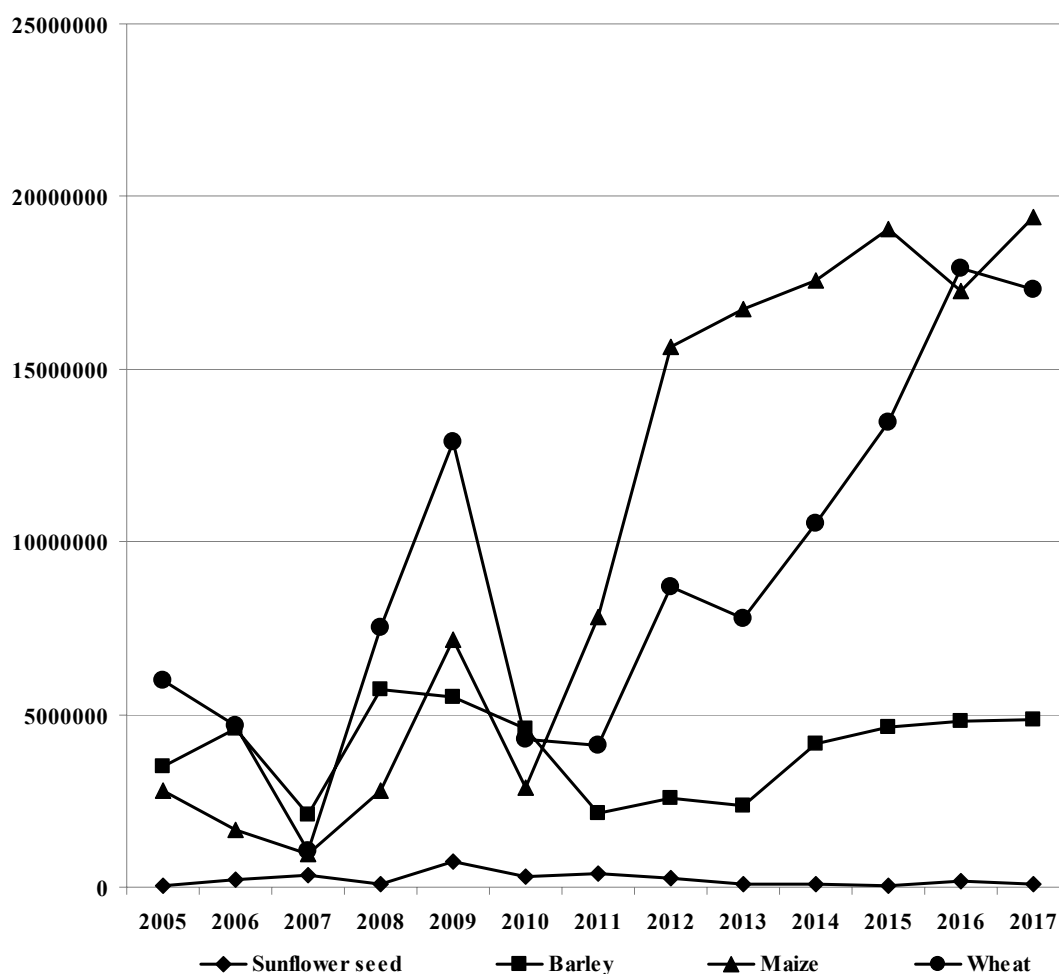


Fig. 1. Dynamics of the most exported agricultural products of Ukraine, tons

Source: compiled by the authors.

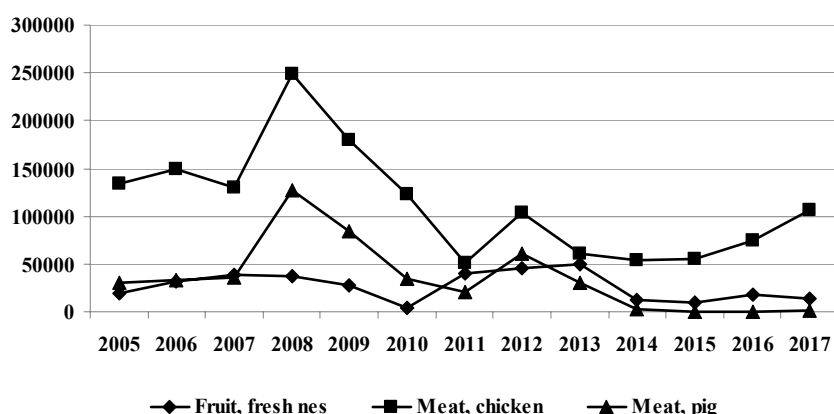


Fig. 2. Dynamics of the most imported agricultural products of Ukraine, tons

Source: compiled by the authors.

with the assistance of the state itself. Even a farmer or a farmer can undoubtedly increase production even with the strict adherence to technology. The state must also take care of providing a guaranteed income to agricultural producers, promote the sale of agricultural products; to increase financing for the re-equipment of enterprises with the latest technologies, to improve the social infrastructure of the village.

To solve problems successfully, the agrarian sector of the Ukrainian economy has sufficient prerequisites: rich natural-resource and export potential, significant human capital, gradually increasing investment attractiveness, preserved lifestyle of rural life and centuries-old traditions of agriculture. In this context, research and scientific reflection on the experience of shaping the European agricultural model will help to increase the level of competitiveness of agro-food products in the European and world markets. Currently, Ukraine exports agricultural products to 190 countries. In Table 1 it is shown the dynamics of exports and imports of Ukraine's crop products for the period 2005—2017.

The prospects for the formation of the agrarian market are determined by such parameters as competitiveness of products, quality and price, which can be ensured in the conditions of open access to the markets of the countries of Europe and Ukraine. Ukrainian agricultural products are steadily gaining momentum in terms of exports to European countries, and over the last few years, there has been a trend of equalization of foreign trade indicators.

In the structure of export of domestic agro-food products, there was a tendency according to which the largest share of operations was in the commodities, first of all — oilseeds. Traditionally, European countries have an interest in oil, oilseeds, industrial crops for the production of biodiesel and impurities for fuel (rapeseed, soybeans, corn). Overall, exports of agri-food products from Ukraine to Europe have a low level of diversification.

The Ukrainian agrarian sector with a production potential far exceeding the needs of the internal market is a link that, on the one hand, can become a locomotive for the development of the national economy and its effective integration into the world economic space, and on the other — the growth of incomes involved in the agrarian economy of the rural population, which is more than a third of the total population of the country, can have a multiplier effect in the development of other sectors of the national

economy. The strategy of development of the agrarian sector of the economy of Ukraine is aimed at the formation of an effective socially oriented sector of the economy of the state, able to meet the needs of the internal market and to secure leading positions in the world market of agricultural products and food on the basis of fixing its multifaceted complexity, which at this stage of development requires the priority of formation of different economic categories.

At the same time, it is important to outline a number of advantages that Ukraine has for developing its exports: — in terms of reserves and mineral resources, it belongs to the group of the leading countries of the continent, owns more than 25% of the most fertile black earths in the world and has favorable climatic conditions for the development of agricultural production. In Table 2 it is examined the dynamics of exports and imports of livestock products in Ukraine for the period 2005—2017.

The agro-food market is a complex system of economic relations and institutional forms of bringing agricultural and food products to the end consumer through stock exchange, wholesale, retail trade, using logistic and information networks in the field of trade in agricultural raw materials, food and semi-finished products, imported from other countries. Agro-food market is characterized by a set of properties that fundamentally distinguish it from other markets. On the one hand, its most important characteristic is its social orientation and significance; the state of this market characterizes the level of development of society as a whole; on the other hand, it is the final consumers of food and their needs and opportunities that determine the direction of development of the agri-food market. Necessary components of the processes of identification and research of the directions of development of the domestic agro-food market are the definition and formalization of the relevant tendencies. In Fig. 1 it is shown the dynamics of the most exported agricultural products of Ukraine.

Agricultural productivity in Ukraine is far from its potential. With such fertile black soil and favorable agro-climatic conditions, Ukraine could reach the European average yield level, i.e. double that. Due to expensive logistics infrastructure, the gap between the producer price and the consumer price widens. The system of sanitary and phytosanitary control is insufficiently developed in Ukraine. The situation is exacerbated by high

Table 3. Exports and imports of sunflower seed in European countries in 2017, tones

Area	Export Quantity	Area	Import Quantity
Ireland	22	Latvia	3023
Switzerland	48	Ireland	3089
Belarus	100	Croatia	4306
Latvia	323	Estonia	5675
Finland	369	Lithuania	6668
Norway	390	Switzerland	6991
United Kingdom	522	Slovenia	7918
Lithuania	1292	Slovakia	8831
Sweden	1339	Norway	12920
Estonia	2968	Finland	13028
Belgium	4192	Denmark	20330
Italy	5887	Greece	22895
Slovenia	6386	Ukraine	24829
Denmark	6524	Sweden	28207
Portugal	6736	United Kingdom	32592
Poland	12693	Belarus	51201
Spain	15689	Poland	61779
Czechia	24301	Serbia	71828
Croatia	29238	Belgium	93507
Greece	33319	Russian Federation	105690
Germany	45567	Austria	147300
Austria	53612	Czechia	162168
Ukraine	73230	Bulgaria	178272
Netherlands	96498	Hungary	178643
Serbia	101586	Italy	222568
Slovakia	223352	Portugal	234398
Russian Federation	313637	Romania	277342
Hungary	321292	France	338252
France	350733	Germany	387840
Bulgaria	784080	Spain	461875
Romania	1334735	Netherlands	577989

Source: compiled by the authors.

Table 4. Wheat exports and imports in European countries in 2017, tones

Area	Export Quantity	Area	Import Quantity
Norway	1	Ukraine	3755
Switzerland	324	Finland	20639
Belarus	378	Slovakia	25257
Ireland	13684	Estonia	33620
Portugal	46416	Lithuania	35708
Slovenia	115255	Czechia	39252
Finland	164422	Bulgaria	60519
Greece	210212	Croatia	119460
Spain	262045	Belarus	140150
Croatia	363760	Hungary	144856
Netherlands	409052	Slovenia	198414
Estonia	533773	Denmark	222335
Italy	579565	Sweden	244799
United Kingdom	644180	Russian Federation	269028
Sweden	705522	Norway	302460
Belgium	712994	Ireland	314040
Austria	730976	Switzerland	527631
Denmark	912266	Latvia	603535
Slovakia	1119245	France	670202
Latvia	2157867	Poland	924930
Czechia	2540738	Austria	1011509
Poland	2785540	Greece	1142726
Lithuania	2991549	Romania	1314087
Hungary	3250479	Portugal	1500880
Bulgaria	4161660	United Kingdom	1868861
Romania	5769094	Germany	4173245
Germany	7890971	Belgium	4575143
France	15228664	Netherlands	5183168
Ukraine	17314278	Spain	6185287
Russian Federation	33025971	Italy	7430204

Source: compiled by the authors.

administrative burden, ill-considered state agricultural policy, lack of equal opportunities for all producers and industries, and unfavorable investment climate.

In our opinion, the restraining factors of increasing the competitiveness of Ukrainian agro-industrial products in foreign markets are: a limited number of types of export-oriented agro-food products (cereals, oilseeds, oils); the discrepancy of certain products with international standards of food safety and quality. Expansion of the markets of Ukrainian producers and strengthening of competitive positions in the world market requires significant organizational and technological updating of production, bringing technological processes in compliance with international veterinary and phytosanitary requirements, development of export infrastructure, etc.

The formation of an efficient agro-food market is a complex and multifaceted issue that requires the study of numerous interrelated problems, as the modern agro-food market needs to be regulated, informative and socially oriented. It should be noted that the priorities for the long-term development of the agrarian sector of the economy should be: balanced functioning of the agro-industrial complex and its most important branch — agriculture, provided the extended reproduction; rationalization of foreign trade structure; creation of appropriate legislative, organizational, economic and administrative conditions that exclude criminalization; ensuring the effectiveness of the instruments of state regulation of the agri-food market. Strategic directions of development of the foreign economic orientation of the agrarian sector of Ukraine should be to improve the quality of products and increase export potential by diversifying the supply of goods with high added value. In Fig. 2 it is shown the dynamics of the most imported agricultural products of Ukraine.

A large part of the global agro-industrial sector is occupied by European countries. The current trends and directions of development of the agro-industrial complex of Europe are intended to solve the following tasks:

- production of enough safe and quality food for European consumers;
- to contribute to the diversification of economic development in rural areas;
- compliance with high environmental and animal welfare standards.

In Table 3 there are analyzed the exports and imports of sunflower seed in 2017 for a more detailed breakdown of the study topic.

In the context of globalization, Ukrainian manufacturers face the need to make more effective use of the principles of international marketing activity in order not only to operate in the world market, but to be competitive and efficiently and profitably to conduct business operations on a global scale, to quickly adapt agribusiness processes to European requirements. An important task at this stage of scientific work is to conduct market research of agricultural markets of foreign countries, which in the modern business conduct will facilitate coordination of activities in the context of international diversification, will allow to make changes to marketing programs, quickly respond to market requests, find optimal ways to penetrate international markets and form their own system of indicators to substantiate management decisions. In

Table 4 there are analyzed the exports and imports of wheat in European countries in 2017.

Ways of the agro-industrial sector development in Ukraine envisage balanced and interconnected structural restructuring of all its branches, maximum introduction into production of the most important achievements of scientific and technological progress, world experience, the most progressive forms of economy and organization of production on the basis of the priority solution of urgent problems: redistribution of land property, including the deepening of land ownership relations and the introduction of mechanisms for the realization of property rights; development of cooperation; state regulation of the agrarian economy through more efficient use of price levers, financial and credit and tax systems; development of markets for agricultural products, logistical resources and services; intensification and diversification of foreign economic activity, etc.

The priority of the agricultural sector development in Ukraine and its leading industries makes it possible to provide the population with food commodities, industry with raw materials, and foreign trade with export goods. Along with the increase in consumption of agricultural products against the background of population growth of the planet and changes in its solvent demand, consumer tastes and preferences change. This leads to the emergence of new sub-sectors and types of agricultural activities, causing the formation of completely or relatively new market niches. And on the part of producers there is no conquest, namely the creation of these new market niches.

The global agricultural markets are characterized by volatility in product prices, price instability, and price discrepancies in other markets. This is due to the climatic characteristics of different regions, seasonal fluctuations in production volumes and costs, the impact of annual yield and productivity features, etc. Therefore, an important priority for ensuring the competitiveness of Ukrainian agriculture in the world markets should be the environmentally oriented formation and implementation of a strategy of market positioning and promotion of goods.

CONCLUSIONS

The study shows that the global agricultural and European markets are growing rapidly. In such circumstances, Ukraine has the potential to strengthen its role in the world trade in agricultural products. However, this requires the development and implementation of an effective strategy to enhance our own competitiveness. In particular, it is advisable to develop organic production and export in the European market; expand the export of products to countries where their traditional production takes place; create new non-traditional market niches and more.

The European agrarian market has its own peculiarities under the influence of which the situation is developing and the system of foreign economic relations with Ukraine in trade in agricultural products is being formed. In view of this, the following trends in the development of the domestic agrarian sector require further improvement: 1) revision of the mechanism of state financial support; 2) motivation to create an attractive investment climate in

agriculture; 3) strengthening control over imports of agro-food products; 4) granting loans for the reconstruction and modernization of enterprises in order to reduce the cost of domestic agricultural products; 6) development of the internal agrarian market and orientation towards the achievement of self-sufficiency in certain types of food, import independence and price parity. These proposals are mutually beneficial for producers and consumers of agro-food products, highlight the strategic role of agriculture in the country's economy and are necessary in the development of a favorable agricultural environment in the future.

Prospective directions of further scientific researches in this direction are substantiation of integration mechanisms of agriculture of Ukraine to the world agrarian market, estimation of their influence on increase of its competitiveness in world markets.

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