THE CURRENT STATE AND DEVELOPMENT PROSPECTS OF THE AGRO-INDUSTRIAL COMPLEX OF THE REPUBLIC OF KAZAKHSTAN

Abstract. The development of agribusiness in Kazakhstan is a promising task and is associated with the creation of technological systems for storage and processing of agricultural raw materials in the production of environmentally friendly, competitive food products of general and special purpose based on modern achievements of nano-, biotechnology.

The solution to the problems of the development of the agro-industrial complex is determined by the level of financing, mainly from the state budget, which should be carried out on the basis of the principles of strategic planning, on the basis of concentration on the essential and priority directions of increasing the competitiveness of agriculture and ensuring food security.

Keywords: agriculture, agribusiness, sustainable development, technology, livestock, crop production.

Introduction. Kazakhstan retains its dynamism to solve the existing structural problems that arose in the process of transition to a market economy, when agriculture was on the sidelines of reforms and began to receive serious support only at the beginning of the new century. Agriculture is one of the key sectors of the economy of Kazakhstan. The level of development of the agricultural sector has always been and continues to be a determining factor in the economic and socio-political stability of Kazakhstani society.

Being one of the priority areas for the development of the economy of the republic, agriculture has enormous potential and large reserves, and the diverse climatic conditions of Kazakhstan make it possible to grow almost all cultures of the temperate thermal zone and develop animal husbandry. Agriculture in Kazakhstan is characterized by such features as a large area and small population, geographical distance from markets and lack of access to the sea. Naturally, this path full of changes and hardships was not easy and not without losses, but thanks to the transition to a market management model, the agricultural sector has become an economically attractive industry.

Main part. Agriculture is the most important sphere of the world economy, which is a complex of industries (agriculture, animal husbandry, fishing, forestry, fisheries) related to the development (collection, production) of plant and animal resources.

In addition, crop production in developing countries is divided into commodity (intended for export) and consumer (for domestic consumption). Developing countries have high hopes for the "green revolution" - the process of industrialization of agricultural production. The main directions of the "green revolution" are: mechanization and chemicalization of agricultural production; cultivation of high-yielding varieties of cultivated plants.

In particular, US agriculture not only provides the population with basic food and raw materials, with the exception of some crops grown in the tropical zone (such as coffee, cocoa, bananas), but also provides large export surpluses. The United States ranks first in the world in the export of agricultural products, giving over fifteen percent of it (in value). Their share is especially great in world trade in the most important food and feed crops - wheat, corn, soy, and also fruits. The export of agricultural products from the United States is several times greater than their import. At the same time, the share of agriculture in the country's GNP is small and, moreover, is gradually decreasing; currently it does not make up 3%.
Agriculture employs less than 4% of the economically active population. However, these figures do not provide a complete and objective idea of the importance of US agriculture both for the country itself and for the whole world.

Thus, in order to increase production and increase export volume, Kazakhstan needs to determine the main priorities in the grain sector and take measures to form a sound export product range, a rational market model, and develop a long-term targeted state program.

It is advisable to strengthen government regulation of the grain market and develop a unified strategy for grain export using the experience of the main grain exporting countries, especially Canada and Australia, where wheat is the main export crop. The state should establish its influence on the export policy of market entities. In the event of a sharp increase in prices for food wheat and mass, uncontrolled export of grain outside the republic, in order to stabilize prices on the domestic market and ensure food security, it is necessary to introduce quotas for the export of grain and flour.

The tenth paragraph of the message of the head of state says: “The agricultural sector of Kazakhstan has great export opportunities and high potential for introducing innovations. The need for food every year in the world will increase. We must not miss this opportunity. The state provides tremendous assistance to agriculture. We should develop and implement a state system of guarantee and insurance of loans to reduce the risks of private investment in agricultural production. Alternative ways need to be found to increase farmers' access to finance.

The state needs to organize and structure the grain industry, create a single grain holding. It is necessary to intensify the implementation of the project to develop the export potential of meat production. I instruct the Government to ensure the development of programs for the development of other branches of animal husbandry, including sheep breeding, as well as fodder production and livestock distillation.

Table 1 - SWOT analysis of agricultural sectors

<table>
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<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tr>
<td>Kazakhstan occupies the ninth place in the world in terms of the area; Kazakhstan occupies the second place in the world in terms of arable land per capita; the presence of 1.4 million hectares of irrigated land; Kazakhstan is one of the largest exporters of grain and flour; growing demand for food products in neighboring countries (CIS, Central Asia, China)</td>
<td>low share of agricultural products in the country's GDP (4.8%); low labor productivity amid a high share of employed (18% of the employed population) and a large rural population (43% of the total population); low share of exports; underdeveloped trade and logistics infrastructure and the practical lack of electronic commerce; low level of technology transfer; scientific research is poorly focused on the needs of agricultural production; the practical lack of private funding for research and technology transfer; insufficient level of veterinary, phytosanitary and food safety; high capital intensity; long payback period; insufficient financing of the agro-industrial complex, including the lack of &quot;cheap and long&quot; money; dependence on climatic conditions; limited water resources and the formation of 44% of runoff in the territory of neighboring states; low level of competitiveness and profitability of agribusiness entities; in the total volume of production, a high share is occupied by uncompetitive low-quality products produced by personal subsidiary plots</td>
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<th>Opportunities</th>
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<td>increase in production for all types of agricultural products; creating conditions for the introduction of technologies and attracting investments, including large-scale digitalization of the agricultural sector; expanding the geography of supplies and export volumes for promising sectors; high potential for production and export of organic products; increase the area of irrigated land and increase their efficiency; creation of conditions for turning agricultural science into a driver of increasing labor productivity and competitiveness of agribusiness sectors; deep processing of eggs and obtaining liquid and powder products</td>
<td>instability of weather conditions, adverse changes in natural and climatic conditions, lack of water resources; the spread of diseases of animals and plants, environmental pollution; increased competition in international markets for certain types of products in connection with the entry into the WTO, EAEU; risk of inefficient government regulation of the industry</td>
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The main challenges in the poultry industry are:

- Lack of breeding and genetic centers. Currently, Kazakhstan lacks the required number of breeding centers and breeding plants, which in turn has led to the use of imported breeding material by poultry farms for the production of meat and eggs in the republic.
- Weak feed base. Despite the fact that Kazakhstan is a grain producer and one of the world's largest exporters of flour, its feed industry is not sufficiently developed. Compound feeds produced by enterprises do not meet the quality requirements of existing poultry farms. Feed mills are located in various regions of the country, and the lack of competition in this area makes them monopolists in the feed industry, that is, they set their prices for products. /5.2/. As a result, feed prices are rising, and government subsidies to farmers, taking into account annual inflation, are not enough to reduce production costs.
- One of the reasons for the low competitiveness of domestic breeding products is associated with an unsatisfactory material and technical base and the capacity of breeding enterprises. Tribal plants with their small numbers cannot supply large quantities of breeding material for modern holdings.
- A narrow range of products by poultry industry enterprises. In this case, it is necessary to expand the poultry market on the basis of improving the quality and expanding the range of products, due to increased demand and an increase in the level of culture and the desire for rational nutrition by the country's population.
- According to preliminary data, in 2019 the gross output of livestock products in the republic amounted to 2,306 billion tenge, which is 12.5% more than the level of the corresponding period of the previous year.
- The number of cattle (cattle) increased by 4% to 7.4 million heads, horses - by 6.8% to 2.8 million heads, poultry - by 2% to 44.3 million heads, sheep - by 7% to 16.9 million heads, camels - by 3.5% to 214.8 thousand heads, pigs - by 2.9% to 822.2 thousand heads.
- Production in slaughter weight of poultry meat increased by 16% to 223 thousand tons, beef - by 5% to 501.4 thousand tons, horse meat - by 4.3% to 132 thousand tons, lamb - by 0.8% up to 152 thousand tons, pork - 0.3% to 86 thousand tons.

In 2019, 115.7 billion tenge was allocated to subsidize the development of livestock breeding and increase the productivity of the industry. 840 family farms received loans for the purchase of 82.2 thousand head of cattle.

The implementation of the agreement on the principles of participation in the development of the modern agro-multi-protein industry in Kazakhstan, signed in December 2019 with the American company Tyson Foods, will give a great impetus to the development of livestock farming. At the first stage, it is planned to build in Kazakhstan a modern meat processing complex with a capacity of about 2 thousand heads per day. The enterprise will not only meet the needs of the Kazakhstani market, but also export products to foreign markets, helping to ensure the country's annual agricultural profit of more than $1 billion.

The meeting participants discussed measures to increase the number of livestock, its productivity, ensure the loading of feedlots and strengthen the forage base.

The purpose of state support for investments is to create a favorable investment climate for the development of the economy and stimulate investment in the creation of new ones, expansion and updating of existing industries using modern technologies, advanced training of Kazakhstani personnel, and environmental protection. The following types of investment preferences are provided for an investment project:

- exemption from customs duties and value added tax on imports; state in-kind grants - the maximum amount of a state in-kind grant is not more than thirty percent of the volume of investments in fixed assets of a legal entity of the Republic of Kazakhstan (land, buildings, structures, machinery and equipment, computing machinery, measuring and regulating instruments and devices, vehicles (excluding passenger cars), industrial and economic inventory).
- tax preferences: corporate income tax; land tax; property tax; investment subsidy; exemption from customs duties; state in-kind grants.

Long-term sectoral agro-industrial development programs until 2027:

1. Beef cattle breeding;
Based on the analysis and comparison of the potential of foreign markets and domestic production capabilities, the main long-term priority for the development of the agro-industrial complex is meat farming.

The adopted model is based on the traditions of nomadic distant livestock breeding and the competitive advantages of Kazakhstan:

1. 180 million hectares of pastures (of which 58 million hectares are used);
2. 3.8 million people of able-bodied rural population (of which 1.3 million people are employed in agriculture);
3. proximity to major growing markets with total imports of more than 2 million tons per year;
4. Dairy farming;
   Increased production of dairy products, protection of the domestic market, reduction of biosafety risks through state support: reduction of% on loans, extension of financing terms and indirect subsidies.
5. Poultry farming;
   Export growth of poultry meat and eggs to 150 thousand tons and 1,500 million pcs. accordingly, through the improvement of existing mechanisms of state support.
6. Irrigated lands;
   Efficient use of pastures, increasing the volume of irrigated pastures for the development of feed production.
7. Crop production;
   Developed crop production has unlimited potential for the development of the forage base, including on irrigated lands (by 2021, the area of irrigated lands will be increased to 2 million hectares, by 2030 - up to 3 million hectares).

Conclusion. The problem of any agro-industrial formation is related to developing a mechanism of economic relations between processing enterprises and suppliers of agricultural raw materials, which reduces to determining the contribution of agricultural producers (suppliers of raw materials) to the final result, that is, what share they take in the proceeds from the sale of products of the processing enterprise to wholesale or selling prices.

To create legal conditions conducive to the development of cooperation, state support is needed - financing of programs for the development of integration and cooperation, soft loans and flexible taxation of agricultural producers.

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ҚАЗАҚСТАН РЕСПУБЛИКАСЫ АГРООНЕРКСІПТІК КЕҢЕНІНІҢ ҚАЗІРГІ ЖАГДАЙЫ ЖӘНЕ ДАМУ ПЕРСПЕКТИВАЛАРЫ

Аннотация. Ауылшаруашылық кез келген мемлекет экономикасының маңызды салаларының бірі болып саналады. Бул адамға еміріне маңызды елім – негізі тамак оғаныр мен тұтыну тауарларының өндіруге арналған шығынбет береді. Қазіргі жағдайда елдің агроонеркесіптік кеңеңінің дамуы арқылы бір жағына, он ізге де байқалады. Біріңдер салалар оңдіріс көлемі есқен, ал өздерімен жұмыс істеу қағиымдарының ізге де байқалады.

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тәті ретінде; жоғары білікті мамандардың жетілсепушілігі. Өкінішке орай, агроенергоспітік кешенге сибекке акы теледін төмен дегісін, ауылшаруашылық қосіпорындарға қарқының құралысы, шешілмеген әлеуметтік мәселелер, климаттік және экологиялық жаңайдарға тұсқылділік және басқа да сәбентір ауылдық жерлердегі мамандарды тартуға және устап калуға ықпал ететінді.

Ішінің әзір-тұлға ұрпағында импортты алып тастау процессінің мемлекеттік колдауына алғашқы артық және ауылшаруашылық оңірдірі мен тамақ оңірдірінің экспорттарын қынталанарды жаңайдығы қарым-қатынасыға агроенергоспітік кешенінің құралысы даму қалайсыз артық екеді. Агроенергоспітік кешені кандайсыз ауылшаруашылық құралысын шешілмей алмайт, ауылшаруашылық оңірдірінің өңіралығы және қылмышқа келуі қарым-қатынаствы, өзіндік тұрғыдағы ауылдың мамандарға өзгеше ескеріп келеді.

Қазақстанда агробизнесті дамыту перспективалы міндет болып саналады және кәсіпкер қызметтерінің негізінде әлеуметтік және басқа да өзгіртіліскен білім беру мен технологиялық жұмыс істеу құралысын қалыптастыру, ауылдық жерлердегі мемлекеттік бюджеттін қолдануға қызмет ететін ауылшаруашылық проекттік құралдардың нақты құрылуына ықпал етеді.

Аннотация. Сельское хозяйство является одной из важнейших отраслей экономики любого государства. Оно дает жизненно необходимую человеку продукцию: основные продукты питания и сырье для выработки предметов потребления. В современных условиях развитие АПК страны происходит неоднозначно. С одной стороны, имеют место положительные результаты: наметился рост производства в ряде отраслей, растёт количество предприятий, работающих с прибылью. Но с другой стороны, остаются и продолжают развиваться негативные процессы, которые преобладают над положительными сдвигами, что в целом позволяет оценить положение в отрасли как сложное, не отвечающее задачам развития экономики. Это подвело страну к опасности потерять продовольственную независимость.

Основная причина снижения темпа роста фермерской деятельности, на наш взгляд, заключается именно в том, что мелкие хозяйства оказались неконкурентными по сравнению с крупными предприятиями в доступе к рыночной инфраструктуре. Переработчики, заготовители, финансовые институты предпочитают иметь дело с крупными производителями, так как это сокращает их трансакционные издержки. По отношению к фермерским и другим мелкотоварным хозяйствам они выступают как исконные монополисты (или монопсонисты). В числе проблем развития АПК нашего региона также следует назвать: недостаточный объем мощностей хранения, логистики и переработки произведенной в регионе сельскохозяйственной продукции; высокий уровень износа сельскохозяйственных машин; недостаточное количество внедряемых инновационных технологий в практику агроведения, а также отсутствие эффективных информационных сетей и, в целом, системы сельскохозяйственного консультирования в качестве механизма полномасштабного распространения инноваций в сельскохозяйственном производстве; недостаток в высококвалифицированных специалистах. К сожалению, низкий уровень оплаты труда в сельскохозяйственной отрасли, финансовая нестабильность сельскохозяйственных предприятий, нерешенность социальных вопросов,
зависимость от климатических и природных условий и многие другие причины не способствуют привлечению и удержанию специалистов на селе.

В условиях усиления государственной поддержки процессов импортозамещения на отечественном продовольственном рынке и стимулирования экспорта сельскохозяйственной продукции, продовольствия возрастают перспективы стабильного развития агропромышленного комплекса. В агропромышленном комплексе дальнейшее развитие получают процессы интеграции сельского хозяйства и перерабатывающей отрасли, становления сельскохозяйственной потребительской кооперации, формирования сырьевых зон перерабатывающих предприятий, агропродовольственных кластеров. Особое внимание предусматривается уделять развитию оптово-распределительной системы, продвижению продукции агропромышленного комплекса на межрегиональные и международные рынки.

Говоря о результативности деятельности мелких производителей, следует отметить, что в последние годы экономическая эффективность производства продукции растёт как в крестьянских (фермерских) хозяйствах, так и в сельскохозяйственных организациях. Тем не менее, эффективность использования земли в крестьянских (фермерских) хозяйствах всё же в 1,6-1,7 раза ниже, чем в коллективных предприятиях и в 12-18 раз ниже, чем в личных подсобных хозяйствах. Несмотря на слабую динамику развития, крестьянские (фермерские) хозяйства оставляют важным фактором стабильности функционирования всего сельского хозяйства, обеспечивая село дополнительными рабочими местами, улучшая показатели трудовой занятости, способствуют вовлечению в производственный процесс пенсионеров и подростков, снижают уровень безработицы в сельской местности, оздоравливают крестьянский уклад, решают проблему трудового воспитания подрастающего поколения и, следовательно, имеют право на существование.

Развитие АПК В РК составляет перспективную задачу и связано с созданием технологических систем хранения и переработки сельскохозяйственного сырья при производстве экологически безопасных, конкурентоспособных пищевых продуктов общего и специального назначения на основе современных достижений нано-, биотехнологий. Решение проблем развития АПК обусловлено уровнем финансирования, в основном из государственного бюджета, которое должно осуществляться исходя из принципов стратегического планирования, на основе концентрации на существенных и приоритетных направлениях повышения конкурентоспособности сельского хозяйства и обеспечения продовольственной безопасности.

**Ключевые слова:** сельское хозяйство, АПК, устойчивое развитие, технологии, животноводство, растениеводство.

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