
PUBLIC ADMINISTRATION

RECEIVED:

16 June 2020

UDC 338.432

ACCEPTED:

16 July 2020

DOI [10.26661/2522-1566/2020-3/13-06](https://doi.org/10.26661/2522-1566/2020-3/13-06)

RELEASED:

20 October 2020

PRESENT STATE AND PROSPECTS OF AGRICULTURAL DEVELOPMENT OF UKRAINE

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Abstract. The article analyses the current state, major product groups and foreign markets of Ukrainian agricultural products. In addition, the potential for development of Ukraine's agro-industrial complex are outlined. The aim of the article is to assess the current state of affairs, to determine the existing and hidden potential, the main trends and obstacles to the disclosure of the export potential of agricultural products in Ukraine. As a result, the main measures to eliminate obstacles to unleash the export potential of the Ukrainian agro-industrial complex are proposed. The findings of the study also prove that the agrarian sector remains an important part of the Ukrainian economy, providing a significant share of foreign exchange earnings. The main driver of growth in agricultural production in Ukraine remains an increase in crop yields due to precision farming, new hybrids, etc. It is stated that the opening of new markets and niches will allow Ukrainian agricultural exporters to consolidate their positions in the international arena.

Keywords: agricultural market, export potential, agro-industrial complex, grain, cereals, export destinations, development barriers, agricultural producers.

JEL Classification: Q11, Q18.

INTRODUCTION

In the global agro-industrial market, grain has long been an important strategic commodity that supports food security and is a stable source of income for agricultural producers around the world. Recently, there has been a significant increase in grain trade, primarily due to market laws of supply and demand. Along with the increase in grain consumption, opportunities are being created for the development of the world market for agro-industrial products and prospects for setting new records for grain exports. Grain is one of the largest commodity positions in the international market, which is traded by many countries around the world, including Ukrainian agricultural producers. Given that the agro-industrial complex is one of the main budget-forming sectors of the national economy of Ukraine, agribusiness opens up prospects for leadership for our country in the world market. Therefore, an important issue is the study of current trends and the elimination of obstacles to the development of the agricultural sector to reveal the export potential of Ukrainian agricultural products.

LITERATURE REVIEW

Theoretical issues on the improvement of the management system in the agro-industrial sector were dealt with by such domestic and foreign scientists as: N.K. Dyachenko, V.Yu. Krivobok., V.V. Gusak, I.M. Nazarenko, I.G. Nesterov and others. V.G. Andriychuk, V.I. Boyko, O.P. Velychko and V.A. Kolodiychuk were engaged in research of problems of agrologistics in grain economy of Ukraine.

The study of growth factors in the economic system has found one of the leading places in the research of domestic and foreign economists: V.P. Alexandrov, O.I. Amosha, Yu.M. Bazhal, L.K. Bezchasiy, E.A. Beltyukova, V.M. Geits, V.G. Gerasimchuk, B.I. Golikov, M.I. Dolishny, V.M. Zhuk and others.

However, despite the significant amount of thorough research, there is a need to improve the efficiency of the agricultural sector, so we consider it appropriate to more fully substantiate the research issue.

PAPER OBJECTIVE

The purpose of the article is to assess the current situation, to outline the existing and hidden potential, to identify the main trends and obstacles to the disclosure of the export potential of agricultural products of Ukraine.

METHODOLOGY

In the course of the study general scientific theoretical and empirical methods were used, such as: analysis and generalization, methods of observation and comparison, analytical, grouping of data. The study also benefited from the Official State Statistics Committee of Ukraine's statistic data when researching the structure of the export potential of agricultural products of Ukraine.

RESULTS AND DISCUSSION

The agro-industrial complex is a component of the country's economy, which includes the production of agricultural products, their logistics and processing. The agro-industrial complex also unites industries that produce means of labor and maintenance and industries that store, process and sell agricultural products. The agro-industrial complex includes three major areas of industry:

- 1) agricultural and food engineering, agrochemistry (mineral fertilizers, microbiological industry), system of material and technical maintenance of agriculture, feed industry, reclamation and agricultural construction;
- 2) animal husbandry, crop production and fishing;
- 3) food industry, refrigeration, warehousing, specialized transport, trade enterprises and logistics organizations.

For many years the agro-industrial complex has been one of the main budget-forming, most profitable sectors of our country's economy and the most attractive areas for investment in Ukraine. The agricultural sector has become a leader in concluding the most expensive contracts.

Today, the export of products of the national agro-industrial complex is estimated at \$ 18.6 billion, which is 39.4% of total exports, and agricultural production is 10.1% of national GDP. Ukraine is a leading country in the export of sunflower oil and meal to the world market. The country also rose from third to second place in the sale of rapeseed on the foreign market and entered the top three in the export of walnuts. Over the past four years, Ukraine has increased its rapeseed exports by 16% and soybeans by 18%. Of the processed products, the leadership is still held by sunflower oil, whose exports have grown by 16% over the past 4 years. Also, our country

ranks 8th in the world for grain production and is one of the five leading countries that export agricultural products to the European Union. In addition, Ukraine ranks first in terms of growth of imports of agricultural products from EU countries (Agravery.com Agrarian News Agency, 2019).

For several years in a row, the main national grain traders are exporting companies – LTD “Nibulon” (13.7% of total exports), “Kernel” (9.9%), “Louis Dreyfus Company”, “Glencore”, “Cargill”, the State Food and Grain Corporation of Ukraine, and “Cofco” (which account for 71% of total grain exports). The small number of Ukrainian grain exporting companies is associated with high capital intensity of the business. After all, only one ship needs to spend \$ 15 million to ship 50,000 tons of cargo. Last year, a significant part of world grain production, including wheat, was provided by grain-exporting countries from the Black Sea coast. Thus, Ukraine, Russia and Kazakhstan have provided 40% of world demand for grain. According to the forecasts of the Food and Agriculture Organization of the United Nations, this year the sale of wheat to foreign trade markets from the Black Sea region will increase by 4% and reach 61 million tons. The leading countries in grain production last year were China, the United States, the EU, India, Brazil, Russia, Argentina, Ukraine, Canada and Indonesia (Table 1).

Table 1

Leading countries are world producers of grain crops, 2018-2019 MR

Place	Country	Cereal production, million tons	Product
1	2	3	4
1	China	545	Corn
			Wheat
			Fig
			Barley
			Millet
2	USA	438	Corn
			Wheat
			Fig
			Wheat
3	EU countries	287	Corn
			Barley
			Fig
			Wheat
4	India	259	Corn
			Wheat
			Barley
			Fig
5	Brazil	117	Corn
			Barley
			Wheat
6	Russia	107	Barley
			Millet
			Corn
7	Argentina	79,5	Wheat
			Barley

Table 1 continuation on the next page

Table 1 continuation

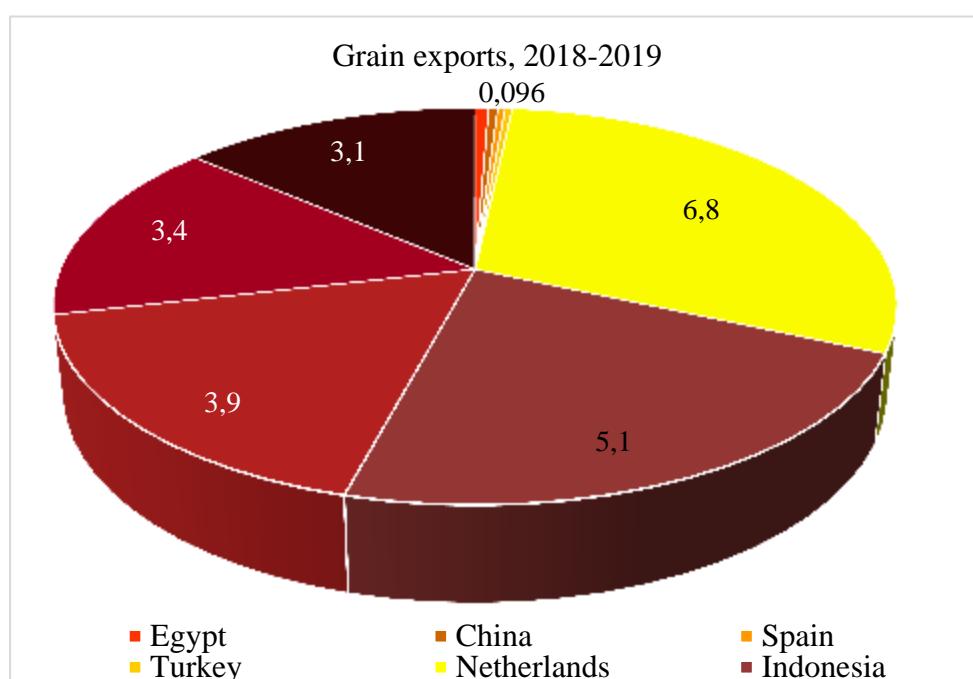
1	2	3	4
8	Ukraine	69,6	Corn
			Wheat
			Barley
9	Canada	58,0	Wheat
			Corn
			Barley
10	Indonesia	48,7	Fig
			Corn

Source: modified after LLC "TOP LEAD" and LLC "Latifundist.Com" (2019)

Table 1 shows that our country ranks 8th among the world's largest grain producers. Ukraine has a huge export potential for grain production. Thus, from the total export of Ukrainian agro-industrial complex products for the 2018/19 marketing year, grain crops accounted for 38.4% of the volume. The most popular grains are corn and wheat. Thus, the grain harvest in 2018/19, which reached 70.1 million tons with an average yield of 47.4 c/ha, became a record for our country in the history of independent Ukraine. The last record was set in 2016 (66.1 million tons).

The main exporters of Ukrainian grain in 2018/19 were the countries of Asia, Europe and Africa. Egypt has been exporting the largest volumes of grain from Ukraine for more than 10 years. In 2018/19, the country purchased 9.2% of total grain exports. In second place for the second year in a row – Spain, which bought grain for \$ 643 million, which is 8.9% of total. Third place went to the Netherlands, which exported grain for \$ 556 million (Delo.ua, 2019). The top ten importers of Ukrainian grain also include China, Saudi Arabia, Indonesia, Italy, the Philippines, Morocco and Tunisia (Figure 1).

Figure 1. Share of grain-importing countries in national exports of Ukraine, %



Source: Adapted from Delo.ua (2019).

As of May 15, 44.3 million tons of grain have been exported from Ukraine since the beginning of 2018-2019. Thus, exports of corn reached 25.5 million tons, wheat – 14.6 million tons, barley – 3.3 million tons (Figure 2):

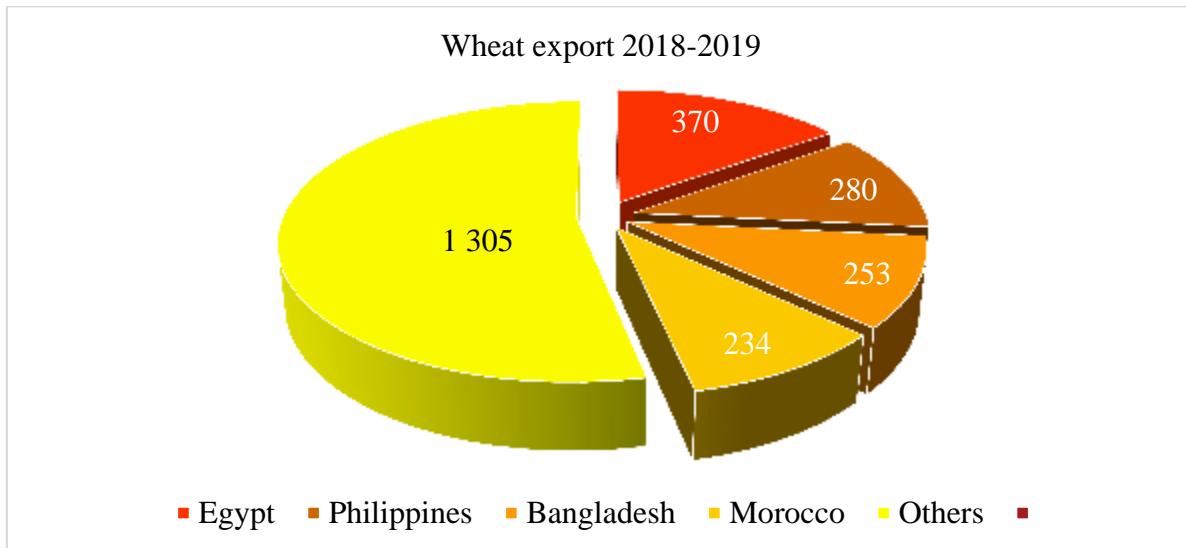


Figure 2. The main directions of wheat exports from Ukraine, million dollars USA

Source: Adapted from the Economic truth Information platform (2019).

The leading countries in the import of Ukrainian wheat are Egypt (1,305 million tons), the Philippines (370 million tons) and Bangladesh (280 million tons). However, total wheat exports in Ukraine decreased by almost 9% compared to the previous marketing year and amounted to 16 million tons. Purchases of wheat from Russia decreased to 42.4 thousand tons, and the share of Russian wheat in total imports decreased from 32% to almost 10% per year (Economic truth Information platform, 2019).

Corn is another major cereal crop in the world, the production of which forms a strategic food basket. For 5 months of the current season, the EU countries imported more than 69% of the total export of Ukrainian corn. There is a positive dynamics of exports in this direction by 144% to 7.9 million tons. The European leading countries in the import of Ukrainian corn are Spain, the Netherlands and Italy. China ranks second among the world's largest consumers of Ukrainian corn. Thus, in September-January 2018-2019 the country increased purchases by 31% to 1 million tons against 814 thousand tons previous season (Ambarexport.ua, 2019). In addition, the positive dynamics of crop exports can be traced in the direction of such markets as Egypt, Libya, and Lebanon (8-10% of the volume of domestic corn) (Figure 3):

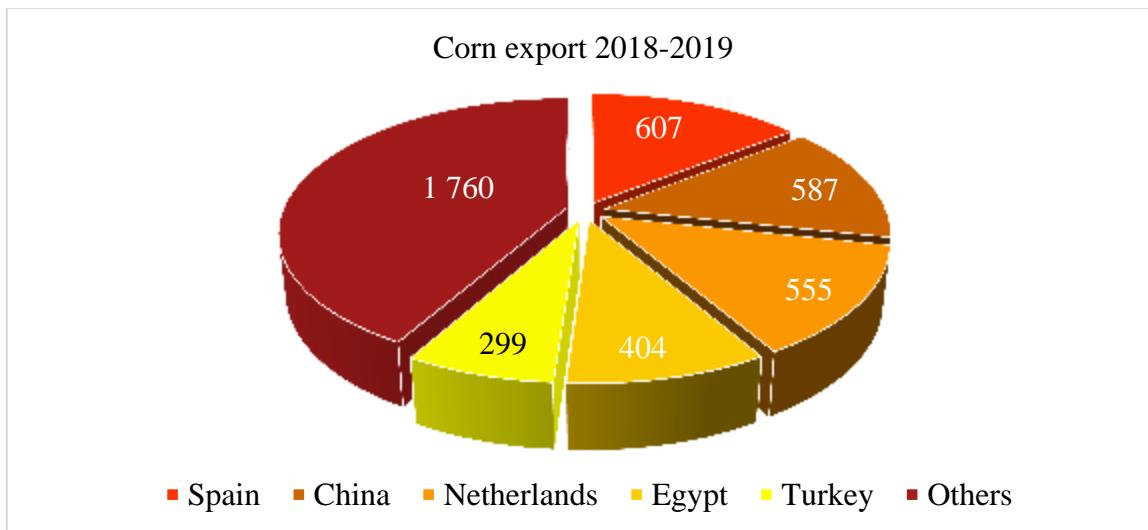


Figure 3. The main directions of corn exports from Ukraine, million dollars USA

Source: Adapted from the Ambarexport.ua (2019)

In September-January 2018-2019 Ukraine exported 11.4 million tons of corn, which is 74.5% higher than the same period last season (6.5 million tons) and 35.7% average over five years for this period (8.4 million tons). Corn exports increased almost 1.6 times compared to the same period previous marketing year to almost 30 million tons.

Exports of Ukrainian barley decreased by 19% compared to the same period last marketing year. However, since the beginning of 2019-2020 Ukraine has exported almost 3.6 million tons of barley, while for the whole previous season the volume of exports amounted to 3.5 million tons (Figure 4):

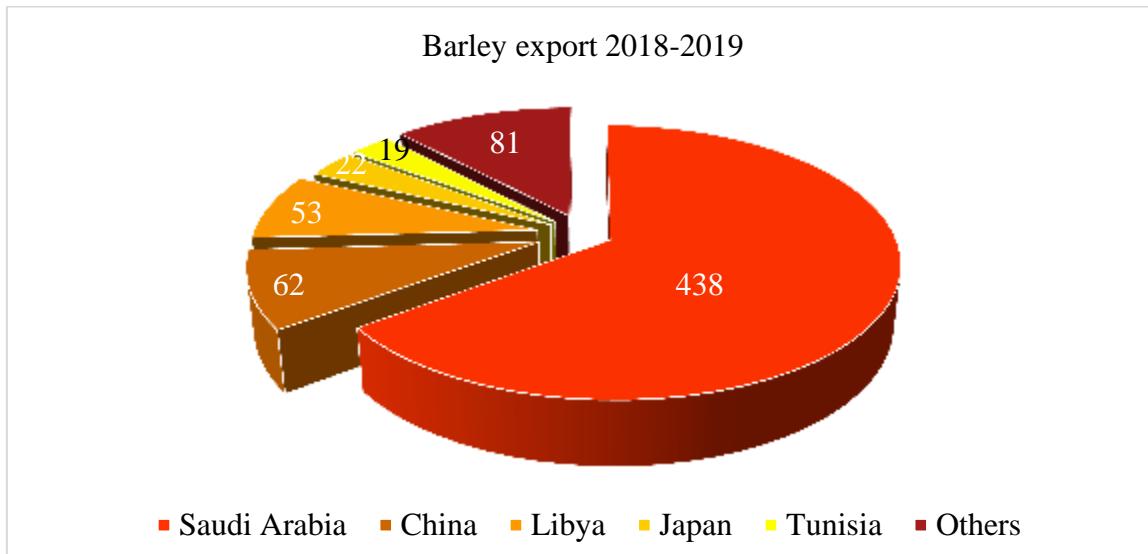


Figure 4. The main directions of barley exports from Ukraine, million dollars USA

Source: Adapted from the Ambarexport.ua (2019)

According to experts, by the end of the marketing year about 1.5 million tons of barley will be supplied to foreign markets of Ukraine. Most of it will be covered by tenders conducted by Saudi Arabia.

Today, sunflower remains a strategically important crop in the structure of the Ukrainian agro-industrial complex, because the crop provides high profits in all climatic conditions and economic troubles. But price fluctuations in the global sunflower market are forcing many growers to modify their own production strategies by intensifying technology, marketing products and minimizing costs. In 2018-2019 Ukrainian farmers received a record for many years sunflower harvest, which amounted to 13.7 million tons, which is 12% more than the same period of previous year (12.2 million tons) (Grow How Information platform, 2019). However, purchase prices for sunflower are at a low level, and their growth rate has not been observed for many years (Figure 5).

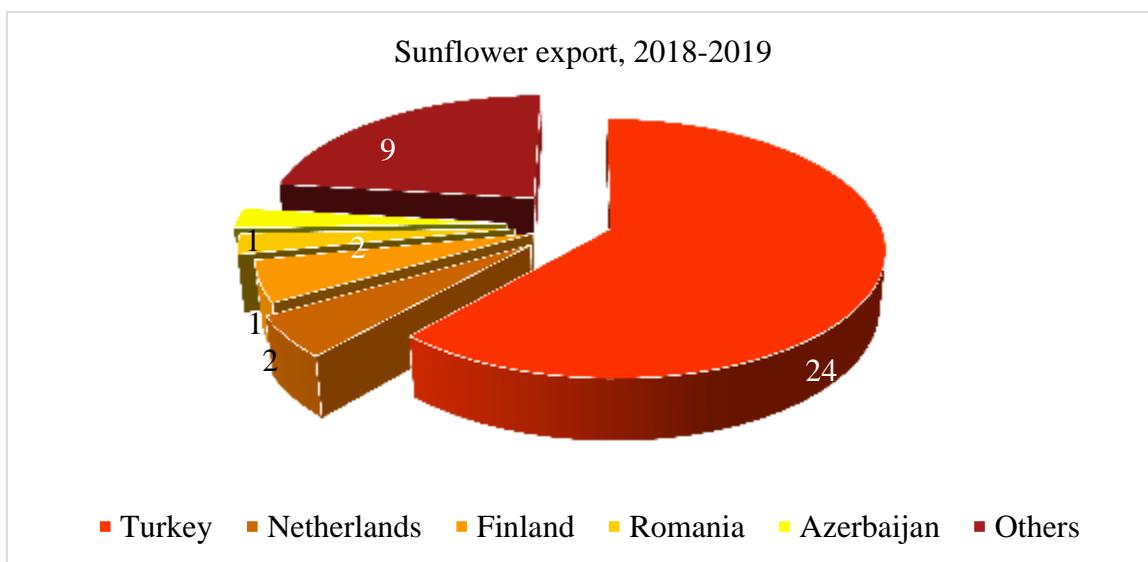


Figure 5. The main directions of sunflower exports from Ukraine, million dollars USA

Source: Adapted from the Grow How Information platform (2019)

Thus, in 2018-2019 Ukraine produced 6 million 400 thousand tons of sunflower oil, of which 6 million tons were exported. Today, Ukrainian exports of sunflower oil account for 60% of the world market (S. Kapshuk, 2019).

Among the processing industries in Ukraine, the oil and fat industry is still leading, which is developing due to the export of products. Every year the country produces more than 6 million tons of sunflower oil. Over the past 10 years, the country has increased exports of this product almost threefold, to 5.8 million tons, and holds more than half of world exports of sunflower oil.

In general, Ukraine needs to increase exports of processed products, not raw materials. However, some industries are able to increase supplies to foreign markets. In particular, the export of poultry meat and offal has been growing by an average of 13% per year for the last 4 years. And over the past 10 years, poultry supplies to foreign markets in monetary terms have increased 12 times.

In 2018-2019, farms of various forms of ownership sold 3,318.1 thousand tons of livestock and poultry for slaughter, produced 1,064,000 tons of milk, and produced 16,138.5 million eggs (Figure 6).

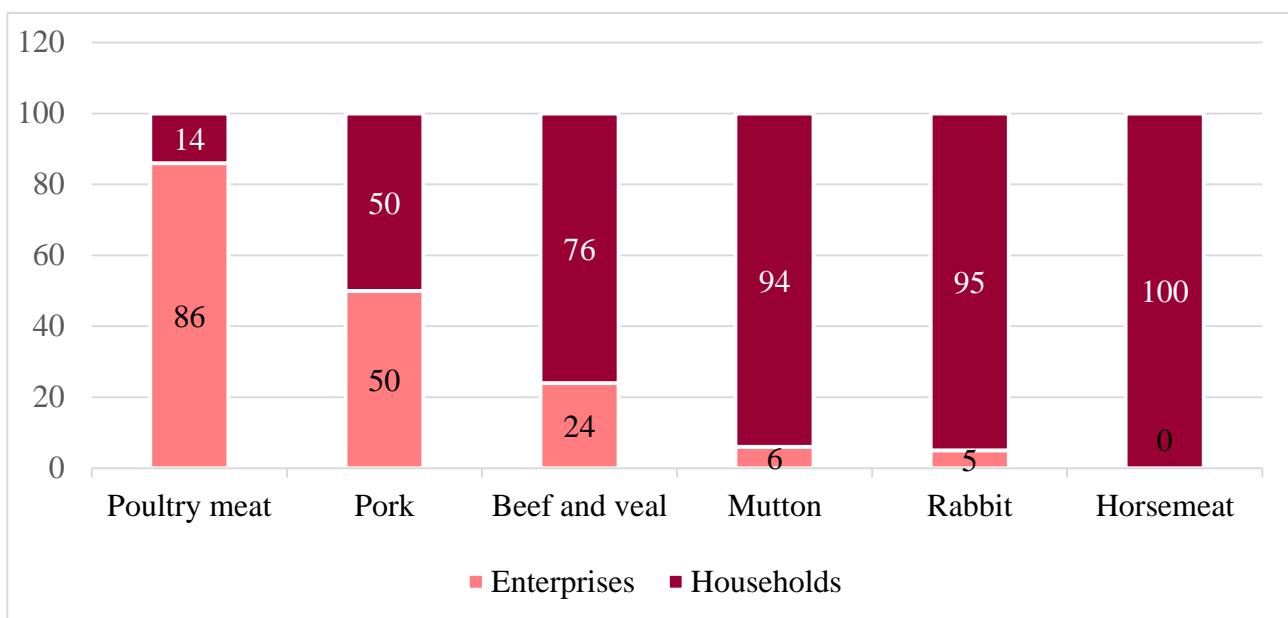


Figure 6. Meat production by categories of farms, %

Source: Adapted from the Latifundist.com Agribusiness Information Platform (2019)

In general, there is a positive trend in meat production by 1.6% compared to the same period last year, but milk production decreased by 2.1% and eggs increased by 4.1%. If we characterize the structure of exports of livestock products, it should be noted that the largest share of manufactured products is poultry, pork, beef and veal (Figure 7).

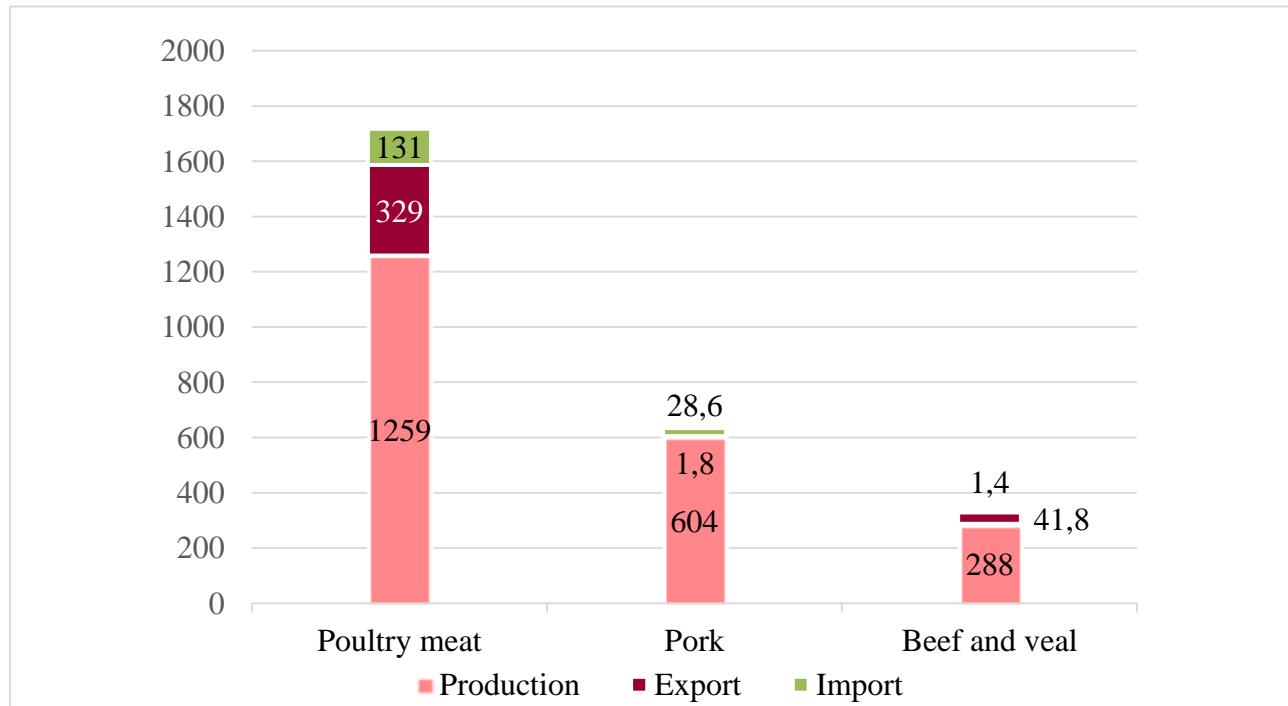


Figure 7. Exports, production and import of meat, thousand tons

Source: Adapted from the Latifundist.com Agribusiness Information Platform (2019)

The main importers of Ukrainian poultry are the Netherlands (49 thousand tons), Iraq (36.5 thousand tons) and Saudi Arabia (32 thousand tons), beef and veal – Belarus (18.7 thousand tons), Azerbaijan (6.9 thousand tons) and Kazakhstan (6.7 thousand tons).

The world market of agricultural products continues to be the leading international trade for producers of national agro-industrial complex, and its trends determine the vector of export development from Ukraine, as well as changing the price situation, affect the national grain sector in the long run. According to experts, Ukraine can provide food from 600 million to 1 billion people. And in the next 10 years the country can triple the production of agricultural products, provided that the legal framework is updated, production technologies are modernized, a favorable investment climate is created and the issue of opening the land market is resolved. However, despite the high rates of harvest and exports, which, in turn, will help attract foreign investment to our country, there are a number of obstacles that block the maximum disclosure of Ukraine's export potential.

Any modern agricultural enterprise is a complex system consisting of interconnected links (logistics, crop control, warehousing, storage and supply of products and raw materials), the inefficient operation of each of which can harm the result or even nullify all efforts. The concept of "system management" is integral to the key success factors in agribusiness. A systematic approach involves interconnected and interdependent influences within a complex system that will function successfully through a systems perspective, tools, and an integrated approach to management. At the strategic level, systemic management in agribusiness should be based on the country's strategic goals, according to a specific period of time, identifying problem areas that are obstacles to unlocking the potential of the agricultural sector, and developing measures to eliminate barriers to national agro-industrial development. The strategic level of systemic agro-management should, first of all, solve the tasks of the Strategy of development of the agrarian sector of the economy of Ukraine for the period up to 2020 (V. Yu Krivobok, 2017).

If we characterize the main problems of the Ukrainian agro-industrial complex, it should be said that for many years in a row such a weak point remains the insufficient level of agrologistics and agricultural infrastructure capacity, inefficient agricultural policy, unresolved land market issues, which in turn are barriers to realizing potential of Ukrainian agro-industrial complex (table 2):

Table 2

The main barriers to unlocking the potential of the Ukrainian agro-industrial complex

<i>Problem</i>	<i>Characteristic</i>
1	2
Exhaustion of agricultural infrastructure capacity	Last year's record harvest showed an imbalance between the available capacity in the agricultural sector and the need for it. As the crop shaft rises, the problem will deepen. That is why state support measures will be aimed at projects for processing and storage of agricultural products
Low level of logistics	For many years, domestic logistics has remained a "bottleneck" for the Ukrainian agricultural sector. The issue of using the potential of logistics, in particular inland waterways, to reduce the costs of economic entities of the agro-industrial complex of Ukraine needs more in-depth study, given its relevance and foreign experience. Thus, in Ukraine about 67% of grain is delivered to ports by rail, 30% – by road and only 3% – by inland waterways

Table 2 continuation on the next page

Table 2 continuation

1	2
Attracting investment	Stability in the field of agriculture, which should be provided by the state, is important for investors. Foreign partners are not intimidated by the political conflict with neighbor country or the elections in Ukraine, but the government's policy towards the agricultural sector remains unpredictable rather than planned
State subsidies in the agro-industrial complex	Some branches of the agro-industrial complex, in particular animal husbandry, have required state support for many years. Therefore, the Ministry of Agrarian Policy plans targeted support in those areas that need it most. However, the effectiveness of specialized programs will become apparent in at least 2 years
The issue of the land market	Although the issue of opening the land market has been a topical issue recently, today there is no political will to vote for the law "On Land Circulation".
Expansion of exports – new markets and products	Constant stimulation of external demand is a necessary condition for the development of agriculture. Over the past few years, the number of partner countries has increased by 50. Thus, Ukraine has 170 markets for agricultural products

Source: Own compilation

Despite the fact that the issue with the fleet of grain trucks has already been resolved in Ukraine (more than 50% of the fleet is owned by private individuals), there are still issues with the railway tracks and the grid. Also, with a fairly strong development of port infrastructure in the country lags behind the restoration of river logistics. River transport can take over 25% of export deliveries of agricultural products. But in order to invest in river infrastructure, it is necessary to adopt the law "On Inland Water Transport".

Table 3

The main problems in the supply chain of agricultural products for export

Logistics link	Problems
1	2
Motor transport	Low level of road network development in rural areas
	Lack of automated trucking systems
	Uneven of size and weight control standards throughout Ukraine
	Low quality roadway cloth
Elevator	The need to develop siding on silos
	Lack of unloading and loading equipment on silos
	Insufficient number and low capacity of elevators
River transport	Insufficient depth of rivers, siltation and "rapids" at the mouth of the Dnieper
	Worn rolling stock and unsatisfactory condition of locks
	Lack of a relevant law on inland water transport
	The construction of the river fleet takes place only at the expense of private Ukrainian companies
	The need to optimize the tax system.

Table 3 continuation on the next page

Table 3 continuation

1	2
Railway	Unsatisfactory condition of locomotives and grain trucks
	The need to modernize railway stations near ports and infrastructure in general
	Improving the efficiency of organization and planning of rail freight of agricultural products
Seaport	The need for increased traction (dredging)
	Insufficient capacity for transshipment and simultaneous storage of grain cargo
	The need for river-sea class vessels.

Source: Adapted from the LLC "TOP LEAD" and LLC "Latifundist.Com (2019)

A separate topical problem of the Ukrainian agro-industrial complex nowadays is the issue of expanding exports by entering new foreign markets. Today, Ukraine faces a challenge: to continue to compete in foreign markets by shaft and price, or to look for new opportunities and more profitable markets. Ukrainian exporters of sunflower oil are responding by lowering the price of their products under pressure from Malaysian palm oil producers and European suppliers of rapeseed oil. Although suppliers of agricultural products can not only find more marginal niches in foreign markets, but also strengthen their position abroad. Every year, market participants strive to work more efficiently. Thus, in 2018 the profitability of agricultural production was 13%, while in enterprises of other industries, this figure averages 4.5% (Latifundist.com Agribusiness Information Platform, 2019).

The volume of direct investment attracted by the agricultural sector has been declining slightly over the last three years (Figure 8). This situation is a consequence of the fact that during this period there were no prerequisites for improving the investment climate in Ukraine. It is expected that with the opening of the land market in the country, the situation will change.

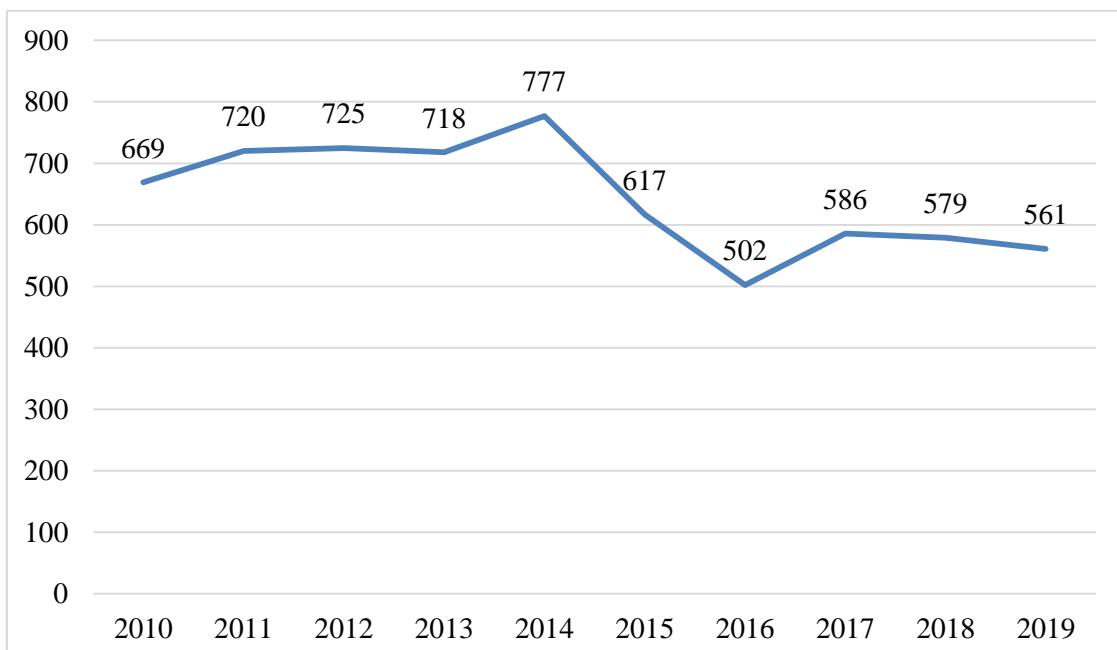


Figure 8. Dynamics of available investments, \$ million

Source: Adapted from the Latifundist.com Agribusiness Information Platform (2019).

If we talk about attracting credit resources, then according to the statistics of the National Bank of Ukraine, in recent years, agribusiness lending is growing. Thus, at the end of July 2019, the volume of loans granted to agricultural producers amounted to UAH 65 billion. Moreover, in the overall structure, the share of loans to farmers reached a record high – about 8%. Agricultural producers are increasingly resorting to long-term financing. Thus, out of UAH 65 billion for short-term financing (replenishment of working capital), UAH 25 billion was allocated, the rest – for long-term loans from 1 to 5 years. An important positive trend in recent years is the increase in long-term financing of farmers, as banks are ready not only to support producers during one sowing, but are ready to go on long infrastructure projects. Also in recent years, the portfolio of banking products to finance farmers has expanded, due to the agricultural receipts. At the same time, the product of agricultural insurance is still insufficiently demanded by market participants and causes prejudice.

However, one of the most important problems of the Ukrainian agro-industrial complex today is the state support of the Ukrainian agribusiness. Ukraine ranked last in Europe in terms of state support for agriculture. Thus, in 2018-2019 in Ukraine, the amount of funds under state programs to support the development of the agro-industrial sector was 4 euros / ha, while in other European countries this figure is an order of magnitude higher. For example, in Greece the amount of state support for the national agro-industrial complex is 945 euros / ha, in Slovenia – 738 euros / ha, in the Netherlands – 715 euros / ha. Despite the fact that Ukraine is forced to compete with these countries in world markets.

Today, new instruments, such as SWAP contracts and international financial agricultural receipts, have been actively used in the international and Ukrainian financial markets. If before such contracts could not be concluded, now this tool can be used as an additional opportunity to hedge risks.

Thus, the agricultural sector remains an important part of the Ukrainian economy, providing a significant share of foreign exchange earnings. The main driver of growth in agricultural production in Ukraine is the increase in crop yields due to precision farming, new hybrids and more. And the opening of new markets and niches will allow Ukrainian agro-exporters to consolidate their positions in the international arena.

CONCLUSION

Every year the potential of the agricultural sector of Ukraine's economy increases, but its use, unfortunately, is limited by a number of obstacles, among which are the following:

- 1) depletion of the capacity of agricultural infrastructure;
- 2) low level of logistics;
- 3) the problem of attracting investment;
- 4) insufficient state subsidies;
- 5) land market issue;
- 6) the lowest level of state support for agriculture in Europe.

The agricultural sector remains an important part of the Ukrainian economy, providing a significant share of foreign exchange earnings. Many farmers create a profitable and successful business, but no less than them are on the verge of bankruptcy, due to lack of financial resources, experience, and unwillingness to adapt and modify their activities to modern market needs, use of outdated technologies and production methods, which weakens the competitive position of manufacturer, compared to other market participants. The main measures to eliminate obstacles to the disclosure of the export potential of the Ukrainian agro-industrial complex may be the following:

1. Elimination of the imbalance between the existing capacities in the agricultural sector and the need for them through the implementation of state support measures aimed at projects for

processing and storage of agricultural products.

2. Construction of appropriate infrastructure in rural areas, in particular access roads and restoration of Ukrainian roads to ensure safe transportation of agricultural products by road.
3. Organization of unloading and loading equipment on silos and maximization of elevators.
4. Restoration of navigation on inland waterways of Ukraine, due to modernization of worn-out rolling stock, dredging works on the Dnieper, elimination of state taxes on locking and construction of bridges and creation of the relevant law on inland water transport.
5. Renewal of worn-out railway rolling stock, modernization of railway stations near ports and infrastructure in general.
6. Attracting direct investment in the agricultural sector and government subsidies to support and develop the agro-industrial complex.
7. Find more marginal niches in foreign markets and strengthen their position abroad.

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СУЧАСНИЙ СТАН І ПЕРСПЕКТИВИ РОЗВИТКУ АГРОБІЗНЕСУ УКРАЇНИ

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У статті проаналізовано актуальній стан, основні групи товарів та зовнішні ринки української сільськогосподарської продукції. Окрім того, окреслено наявний та прихованій потенціал та визначено перспективи розвитку агропромислового комплексу України. Метою статті є оцінити сучасний стан, окреслити наявний та прихованій потенціал, визначити основні тренди та перешкоди розкриття експортного потенціалу сільськогосподарської продукції України. В якості висновків запропоновані основні заходи ліквідації перешкод для розкриття експортного потенціалу українського АПК, а також доведено, що аграрний сектор залишається важливою частиною української економіки, забезпечуючи значну частку валутної виручки. Основним драйвером зростання виробництва продукції АПК в Україні залишається збільшення врожайності культур за рахунок точного землеробства, нових гібридів тощо. А відкриття нових ринків і ніш дозволить українським агроекспортерам закріпіти свої позиції на міжнародній арені.

Ключові слова: аграрний ринок, експортний потенціал, агропромисловий комплекс, зернові, напрямки експорту, бар'єри розвитку, агровиробники.

СОВРЕМЕННОЕ СОСТОЯНИЕ И ПЕРСПЕКТИВЫ РАЗВИТИЯ АГРОБИЗНЕСА УКРАИНЫ

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В статье проанализированы актуальное состояние, основные группы товаров и внешние рынки украинской сельскохозяйственной продукции. Кроме того, определены имеющийся и скрытый потенциал и перспективы развития агропромышленного комплекса Украины. Целью статьи является оценить современное состояние, определить имеющийся и скрытый потенциал, основные тренды и препятствия раскрытия экспортного потенциала сельскохозяйственной продукции Украины. В качестве выводов предложены основные мероприятия ликвидации препятствий для раскрытия экспортного потенциала украинского АПК, а также доказано, что аграрный сектор остается важной частью украинской экономики, обеспечивая значительную долю валютной выручки. Основным драйвером роста производства продукции АПК в Украине остается увеличение урожайности культур за счет точного земледелия, новых гибридов и тому подобное. А открытие новых рынков и ниш позволит украинским агроэкспортёрам закрепить свои позиции на международной арене.

Ключевые слова: аграрный рынок, экспортный потенциал, агропромышленный комплекс, зерновые, направления экспорта, барьеры развития, агропроизводители.