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FLOUR MARKET IN KAZAKHSTAN: KEY ASPECTS

ҚАЗАҚСТАНДАҒЫ ҰН НАРЫҒЫ: НЕГІЗГІ АСПЕКТІЛЕРІ

РЫНОК МУКИ В КАЗАХСТАНЕ: КЛЮЧЕВЫЕ АСПЕКТЫ

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Abstract. The *aim* is to study the structure and mechanism of functioning of flour market in Kazakhstan. *Methods* – used official information of the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, analysis, synthesis, comparison grouping. *Results* – general description is given and indicators of its producers at the world level are analyzed: leaders of production, structure, share of continents in exports, the largest importers of this most important wheat grain processing product are identified. On the basis of statistical data, development of flour-grinding industry of the republic over the past five years is shown according to such criteria as: the balance of supply and demand, main indicators of the living standard of the population, rational norms of food consumption per capita, structure of consumer spending, food price index. Unevenness and decrease in production volumes in dynamics are noted. Information about the factors that determine the value of cost of this product is presented. *Conclusions* – based on the results of the study, the authors state a decrease in the scale of flour production and increase in prices for it, due to the negative impact of the Covid-19 coronovirus, special military operation of the Russian Federation in Ukraine on the economy of all countries of the world, including Kazakhstan. It is substantiated that sustainable increase in production of these products of great nutritional value can be ensured by expanding its range, monitoring baking properties using appropriate research methods and technologies, increasing the competitiveness of products and increasing its export potential – one of the most promising areas of foreign economic trade for Kazakhstani commodity producers. In particular export plays an important role in the development of agricultural economy of the state. Its condition is an important indicator of the quality of ongoing economic reforms and implementation of agri-food policy.

Аңдатпа. *Мақсаты* – Қазақстан ұны нарығының құрылымы мен жұмыс істеу механизмін зерделеу. *Әдістері* – Қазақстан Республикасы стратегиялық жоспарлау және реформалар агенттігінің ұлттық статистика бюросының ресми ақпараты, талдау, синтез, салыстыру топтамасы пайдаланылған. *Нәтижелері* – жалпы сипаттама берілген және оны өндіру-шілердің әлемдік деңгейдегі көрсеткіштері талданған: өндіріс көшбасшылары, құрылымы, экспорт бойынша континенттердің үлесі, бидай дәнін өңдеудің осы маңызды өнімінің ірі импорттаушылары анықталған. Статистикалық деректер негізінде республиканың ұн тарту саласының соңғы бес жылдағы дамуы: сұраныс пен ұсыныстың теңгерімі, халықтың өмір сүру

деңгейінің негізгі индикаторлары, жан басына шаққандағы азық-түлікті тұтынудың ұтымды нормалары, тұтыну шығыстарының құрылымы, азық-түлік тауарлары бағасының индексі сияқты критерийлер бойынша көрсетілген. Динамикада өндіріс көлемінің біркелкі еместігі және төмендеуі байқалады. Осы өнімнің өзіндік құнын анықтайтын факторлар туралы ақпарат берілген. *Қортындылар* – зерттеудің алынған нәтижелері негізінде авторлар Covid-19 короновирусының теріс әсерінен, Ресей Федерациясының Украинадағы арнайы әскери операциясын жүргізуден, әлемнің барлық елдерінің, соның ішінде Қазақстанның экономикасына ұн өндіру көлемінің төмендегенін және оған бағаның өскенін айтады. Азық – түлік құндылығы жоғары осы өнімнің өндіріс көлемінің тұрақты өсуін оның ассортиментін кеңейту, тиісті зерттеу әдістері мен технологияларын пайдалана отырып, наубайхана қасиеттерін бақылау, өнімдердің бәсекеге қабілеттілігін арттыру және оның экспорттық әлеуетін ұлғайту-қазақстандық тауар өндірушілер үшін сыртқы экономикалық сауданың ең перспективалы бағыттарының бірі есебінен қамтамасыз етуге болатындығы негізделген. Бұл мемлекеттің аграрлық экономикасын дамыту үшін маңызды рөл атқаратын экспорт. Оның жағдайы-жүргізіліп жатқан экономикалық реформалар сапасының, агроазық-түлік саясатын іске асырудың маңызды көрсеткіші.

Аннотация. *Цель* – изучение структуры и механизма функционирования рынка муки Казахстана. *Методы* – использованы официальная информация Бюро национальной статистики Агентства по стратегическому планированию и реформам Республики Казахстан, анализ, синтез, группировка сравнения. *Результаты* – дана общая характеристика и проанализированы показатели ее производителей на мировом уровне: определены лидеры производства, структура, доля континентов по экспорту, крупнейшие импортеры этого важнейшего продукта переработки зерна пшеницы. На основе статистических данных показано развитие мукомольной отрасли республики за последние пять лет по таким критериям, как: баланс спроса и предложения, основные индикаторы уровня жизни населения, рациональные нормы потребления продовольствия на душу населения, структура потребительских расходов, индекс цен на продовольственные товары. Отмечаются неравномерность и снижение производственных объемов в динамике. Представлена информация о факторах, определяющих величину стоимости на данный продукт. *Выводы* – на основе полученных результатов исследования авторы констатируют снижение масштабов выработки муки и рост цен на нее, обусловленных негативным влиянием короновируса Covid-19, проведения специальной военной операции Российской Федерации в Украине на экономику всех стран мира, в том числе Казахстана. Обосновано, что устойчивое наращивание объемов производства этой продукции большой пищевой ценности можно обеспечить за счет расширения ее ассортимента, контроля за хлебопекарными свойствами с использованием соответствующих исследовательских методов и технологий, повышения конкурентоспособности продуктов и увеличения ее экспортного потенциала – одного из самых перспективных направлений внешнеэкономической торговли для казахстанских товаропроизводителей. Именно экспорт играет важную роль для развития аграрной экономики государства. Его состояние – важный показатель качества проводимых экономических реформ, реализации агропродовольственной политики.

Key words: agro-industrial complex, flour mills, flour, global, domestic market, consumption of milling industry products, consumer spending structure, food price index.

Түйінді сөздер: агроөнеркәсіптік кешен, ұн тартатын кәсіпорындар, ұн, әлемдік, отандық нарық, ұн тартатын өнеркәсіп өнімдерін тұтыну, тұтыну шығыстарының құрылымы, тамақ өнімдері бағасының индексі.

Ключевые слова: агропромышленный комплекс, мукомольные предприятия, мука, мировой, отечественный рынок, потребление продуктов мукомольной промышленности, структура потребительских расходов, индекс цен на пищевую продукцию.

Introduction. One of the key tasks of the national economy of any country is the agro-industrial complex (AIC), which includes the production of vital products for the population and its economic potential. The development of the agro-industrial complex determines significantly the condition of other sectors of the economy, the level of food security of the country and the socioeconomic situation [1].

Nowadays Kazakhstan occupies a leading position in the flour export. Flour export is the drive force behind the entire flour milling industry in our country. There is an excess capacity of flour mills in Kazakhstan, a low level of its use, there is a severe reduction in the total number of mills due to the exit from the market of low-capacity mills, which, the point, have fulfilled their historical task of saturating and establishing the mill market in the country.

The grain processing industry needs to be given the status of a "national priority" and a long-range program for its development and support is to be developed [lk.1]. Currently, the processing industry of Kazakhstan is in a relatively stable state, but it requires further development, increasing competitiveness and export capacity. The adoption of such measures as the development of promising sectors of the AIC, the improvement of manufacturing process and the establishment of a new brand of Kazakhstan would help to improve the quality, volumes and export capacity of the Kazakh processing industry.

The performance of the flour market is specific in rural and urban settlements, especially in large ones, called metropolitan [2]. The flour market is of great socioeconomic importance, including due to the population overconcentration, industry, and trade. Therefore, the analysis of the condition of this market, the study of the specifics of its functioning, the trends identification in its development, the proposals generation for improving effectiveness are very relevant.

Material and methods of research. The market as an economic category is a multifunctional and multifaceted concept, has a complex hierarchical structure, and is sensitive to the economic, social, and demographic situation [3]. Therefore, its study should be carried out taking into account a large number of factors. At the same time, the markets are differentiated by types of goods, which is especially typical for food markets. The flour market plays a special role among them, determined primarily by the high and relatively constant share of flour in the consumption by the population.

The study was conducted by using such kind of methods as abstract-logical, economic-analytical, logical, statistical and other methods of economic research. The use of economic analysis, in particular, the comparison method, made it possible to identify trends and patterns in the flour market development, the grouping method for determining the most significant factors influencing the flour market development, abstract-logical for summarizing and systematize data on the flour-melling industry and identify trends in the market flour, economic and statistical - in the study of development trends of enterprises in the flour-grinding industry.

The methodological base used in the aggregate made it possible to obtain reliable and reasonable conclusions, to determine practical recommendations that allow the development of flour-grinding enterprises.

Results and their discussion. The most common cereal crops for flour production are wheat, corn and rice, however wheat flour production is still the highest. More than 600 million metric tons of wheat and corn flour are processed and consumed annually in the world in the form of noodles, bread, pasta and other flour products.

According to Businessstat calculations, in 2021, the global flour output amounted to 241 million tons and increased by 4.5% compared to 2017. The output increased annually as demand from the inhabitants of the planet grew [4]. Factors such as population growth, increased disposable income, increased consumption of bakery products and lifestyle changes have further increased global demand for wheat flour.

China is the leader in terms of flour production in the world, in 2021 the production volume in this country was estimated at 76.2 million tons, significant production volumes are due to the large population and, accordingly, the need for food products, as well as the development of industrial processing.

The United States is the second largest flour producer in the world, in 2021 the production volume amounted to 19.2 million tons. However, in recent years, the production of flour in the US has tended to decrease, which is mainly due to a change in the preferences of Americans to the order of diet food and the refusal to consume high-calorie flour products.

Leading positions in terms of flour production in the world are also occupied by Turkey, Brazil and Russia.

The most common cereals for flour production are wheat, corn and rice, but wheat flour production is still the highest.

Over the past five years, wheat or wheat–rye flour has been the leader in the world structure of flour production. The share of this type of flour in 2021 averaged 96%. At the same time, the share of corn flour production is estimated at 2.4% of the total production volume, and the remaining 1.6% is accounted for by other flour types.

Asia accounted for 42.6% of global flour exports in 2021, followed by suppliers from Europe (36%) and North America (10,1%). Latin America and the Caribbean accounted for 7.7% of international flour sales, while African exporters share accounted for 2.9%.

Around 0.7% came from shippers from Oceania, primarily Australia and New Zealand.

The largest importers of wheat flour in the world are Afghanistan (3 million tons), Iraq (2.7 million tons), African countries (3 million tons) and others.

The modern domestic flour-grinding industry is one of the socially significant branches of the agro-industrial complex. Bread, bakery, pasta and cereal products made from flour play an important role in ensuring the country's food security [5,6]. Consider the dynamics of flour production in table 1.

Table 1 - Dynamics of flour production volume for 2018-2022

Indicator	2018	2019	2020	2021	2022*
Flour production volume, thousand tons	3 803,1	3 271,8	3 355,3	3 009,9	3 055,1
Growth rates,%	100,0	86,0	102,6	89,7	101,5
Note: prepared by the authors according to the source [7] * preliminary data					

In 2022, according to preliminary data, 3,055 thousand tons of flour were produced in Kazakhstan and increased by 1.5% compared to 2021. For the period 2018-2021, the volume of flour production decreased by 20.8%.

There are about 300 flour-milling enterprises with a total capacity of 10.3 million tons of grain per year in the country, the level of use of production capacities of flour mills is 29.1% on average.

In general, the industry has:

- an overabundance of production capacities for the flour production, a low level of its use due to high competition in the flour market;
- reduction of volume in flour production;
- increase in wear and tear of equipment, the specific weight of material costs in the structure of the cost of production and others.

With a domestic market capacity of about 1.8 million tons, Kazakhstan exports more than 2.3 million tons annually [8]. Flour is exported to such countries as Uzbekistan, Kyrgyzstan, Tajikistan, Turkmenistan, Afghanistan, China.

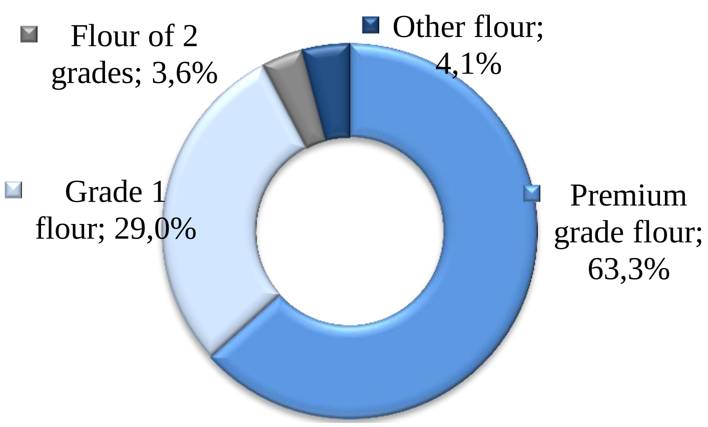
The overwhelming volume of sales in the foreign market is flour of the first grade. And, on the contrary, flour of the highest grade is in primary demand in the domestic market.

Indicators of sustainable and qualitative development of the flour milling industry will be the growth of productivity and quality with a focus on the export of flour with high added value to strengthen Kazakhstan's competitive position in the global market [9].

In order to expand the market capacity both inside and outside the country, it is necessary for flour-milling enterprises to diversify production, i.e., along with flour production, to increase the production capacity of feed production, since animal husbandry and the meat industry are actively developing in the country, and the pace of feed development lags behind the pace of development of these industries [10,11].

The next direction of diversification is the production of cereals [12]. This industry in Kazakhstan is in its infancy, and Kazakhstan buys most of the cereals on foreign markets, mainly from Russia.

The need of the Kazakh market for flour is almost completely due to its own production. The basis of the domestic flour-melling market is wheat flour, which is in the greatest demand: it accounts for 96% of the total production volume, 63.3% of which is premium flour (figure 1).



Note: prepared by the authors according to the source [lk.7]

Figure 1 - Structure of wheat flour production in Kazakhstan in 2022, %

Wheat flour of the first grade accounts for 29%, another 3.6% is on flour of the second grade, and the remaining share (4.1%) is for corn and other type of flour.

One of the main displays affecting the capacity of the food market is the population. Market capacity is formed on the basis of scientifically grounded consumption rate of each type of product per capita and number.

In the period from 2018 to 2022, the population in Kazakhstan increased from 18 157.3 thousand people to 19 741.3 thousand people [lk.7], the growth rate was 108.7%, in absolute terms increased by 1 584 thousand people, which positively affects the growth of the need for food, including flour products.

The next factor influencing the development of the food market is the living standards of the population. The influence of this factor can be assessed on the basis of such kind of indicators as cash income, on average per capita; average per capita nominal cash income of the population, and average mon-thly wages.

As the table 2 shows, for the period under review of 2018-2022, cash income per capita increased by 46.2% on average, and nominal cash income increased by 63.7%. And the wages of employees in the sphere of economics in 2018-2022 increased by 2.6 times. The level of economic activity for the period under review decreased from 79% to 69%.

Table 2 - The main socio-economic indicators of the standard of living of the population of Kazakhstan in 2018-2022

Indicators	2018	2019	2020	2021	2022*
Cash income, on average per capita per month , tg	160 400	175 900	189 000	210 700	234 522
Per capita nominal monetary incomes of the population	93 135	104 282	116 126	131 797	152 519
Average monthly salary, tg	115 101	150 509	168 313	235 357	299 782
The level of economic activity of the population, %	79	79	78	70	69
Note: prepared by the authors according to the source [lk. 7] * preliminary data					

The analysis of the actual volumes of food consumption per capita will allow us to assess the shifts in the structure of expenditures, namely, improvements – deterioration in the quality of nutrition and increase - reduction in the volume of human food consumption (table 3).

Table 3 - Food consumption per capita in the Republic of Kazakhstan in 2016-2021 (according to a sample survey of household budgets; average per household member per year, kg)

Year	Bread products	Potato	Vegetables	Fruit	Meat and meat products	Milk and dairy products	Eggs, pieces	Fish and fish products	Sugar and confectionery	Vegetable oil and other fats
2016	130,7	48,6	89,3	61,4	72,9	235,5	164,7	10,9	40,7	19,5
2017	133,7	46,9	88,5	64,6	72,9	237,7	168,5	10,7	41,3	19,5
2018	138,4	48,6	94,1	74,9	77,9	261,3	193,3	13,2	46,3	19,2
2019	136,3	48,5	91,4	77,8	78,9	253,5	194,3	14,6	42,9	17,1
2020	140,3	46,0	86,3	78,6	83,6	259,4	199,1	15,1	43,0	17,2
2021	133,7	46,3	80,6	76,8	82,2	243,1	193,8	14,8	44,0	16,2
Growth rate 2021 to 2016y.%	118,4	86,6	110,1	132,6	133,5	107,8	109,3	134,9	75,9	125,6
Note: prepared by the authors according to the source [lk.7]										

For the period analyzed of 2016-2021, the growth rate of food products consumption by households is observed for all types of products, with the exception of potatoes and sugar. The consumption of meat, fruits and vegetables, sunflowerseed oil, and grain products remains stably high.

Despite this, the actual consumption of the main food groups – dairy products, eggs, vegetables, fruits and berries – does not reach the recommended rational norms of food consumption as of 2021. The consumption of food products by households meets the recommended standards only for the group «meat and meat products», exceeds – for the groups «bread, bread products».

It should be noted that the level of per capita consumption of bread and bakery products in households located in rural areas is significantly higher than in cities, that is associated with a lower level of cash income of the rural population and a high degree of food products self-sufficiency, including bread products.

The most important characteristics of the consumer demand of the population in the market of food products are the structure of consumer spending of the population. Household consumer spending is a part of the monetary expenditures aimed at the purchase of food, non-food products and other services.

The period under review of 2016-2021, in the structure of consumer spending, the share of food costs for an average family in Kazakhstan increased from 45.45% to 58.8%, for non-food products decreased from 24% to 17 %, for paid leisure, educational and other services decreased from 20.8% to 15.4%. The growth or decrease in the consumption of goods and services depends on the income of the population. If the incomes of the population grow, then spendings on food products will decrease and growth on non-food products and other types of services.

Despite the growth in cash incomes of the population, there is an increase in spending on food products, that is associated with an increase in food prices from 30 to 50% due to inflationary development.

The development of the food market is influenced by food price indices by product categories.The growth of average prices for certain types of food products characterizes the intensity of inflationary processes, the general situation with price-related competition in the consumer market, and indirectly, the interest of competing business structures in the food market (table 4).

Table 4 – Consumer price indices for basic foodstuffs in the food market of the Republic of Kazakhstan for the period 2018-2022 (December to December of the previous year), %

Year	Meat and meat products	Dairy products	Bread products	Flour
2018	108,3	100,2	102,1	93,6
2019	104,0	107,0	111,1	126,2
2020	112,3	110,0	108,5	110,8
2021	112,5	107,6	103,4	98,5
2022*	116,5	131,3	133,6	147,3
Note: prepared by the authors according to the source [lk.7]				

Average annual growth rates of price indices for the period from 2018 to 2021 amounted to 9.3% for meat products, 6.2% for dairy products, 7.2% for bakery products, and 7.3% for flour. The growth rate of price indices for aggregate food groups in 2022 compared to 2021 increased from 16.5% to 47.3%.

Price increase for food is associated with the negative impact of the Covid-19 coronovirus on the economy of the world [13] and the country in 2020-2021, a special military operation in Ukraine in 2022, as a result of which supply chains around the world were broken, transport links between a number of countries were disrupted, as well as the sanctions war against one of the largest integrated partners of Kazakhstan - Russia, led to a global increase in inflation [14] and prices for absolutely everything.

In 2022, energy resources in the world have almost doubled in price, food products – by 31%. And the total accumulated growth in products has already amounted to more than 50%. The price growth in Kazakhstan is currently affected by the base rate of 14%, and this is one of the highest rates in the world, the tenge exchange rate, as well as the global trend of rising prices for food and raw materials for its manufacture.

Kazakhstan, as a country integrated into the global economy, also records an increase in prices for fuel, spare parts, equipment repairs and others, which spurred an overall increase in inflation in September 2022 in annual terms to 17.7% and required manufacturers to raise wages, which also caused an increase in the cost of the final product. Food products increased in price by 22.2%, non-food products - by 17%, services - by 12.3% [15].

Conclusions

1. Based on the results of the analysis of the Kazakh flour market, it is possible to draw a reasonable conclusion that the segment of flour products is extremely limited, and their assortment does not fully meet modern consumer requirements.

In the future, the bread production complex, i.e. along the grain-flour-flour products chain, faces the problem of maintaining a stable level of demand for bread products and stimulating the growth of consumption of bread products by increasing the production of high-quality products, expanding the assortment, developing new types of flour, bread, bakery products, pasta and flour confectionery.

2. There is a loss of traditional markets for Kazakh wheat and flour in the main importers – the countries of Central Asia, an overabundance of production capacities of flour mills. The key driver of export diversification is the private sector, therefore, the milling industry needs government support in order to develop and increase their export opportunities through expanding access to foreign markets, creating favorable conditions that provide access to large developed markets (for example, export subsidies, tax holidays and easier access to finance).

3. In order to sustainably develop the competitive advantages of flour milling enterprises, it is necessary to develop an innovative environment, a technology transfer system, high-quality industrial and digital infrastructure, human capital, competence centers, testing and certification infrastructure.

4. The millers cannot solve the accumulated problems on their own, therefore it is necessary to switch to a new model of work – public-private partnership and carry out effecttive measures of state support for flour milling enterprises.

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