



Раздел 3
ОБЩЕСТВЕНИ НАУКИ
Section 3
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PRODUCTION AND EXPORT OF FRUITS AND VEGETABLES: OPPORTUNITIES AND CHALLENGES

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Abstract. Raising of the rate of production and export of fresh and processed fruit and vegetable in Uzbekistan, implementation of the existing potential in this area may be an important factor in the growth and diversification of exports, reduce the vulnerability of the macroeconomic situation of the unstable market situation on the world, create new jobs and increase the real incomes of the population, especially in countryside. All this will contribute not only to accelerate the pace of economic growth, but also the strengthening of macroeconomic and social stability. However, the analysis shows that there is an urgent need for further deepening of reforms in the sphere of production and sale of fresh and processed fruit and vegetable products.

Key words: Fresh and processed fruit and vegetable production, area under crops, agricultural commodities, sorting, labeling and packaging, transport and logistics companies, cold storage facilities, agricultural policy, the market of fruits and vegetables.

INTRODUCTION

In response to the US and EU sanctions Moscow has imposed retaliatory sanctions, which were mainly related to the import of agricultural, dairy and meat and fish products from all countries of the European Union, the United States, Australia, Canada and Norway. According to various estimates, the cost amounted to 9 billion restrictions on imports of agricultural and food products. US dollars, and that's not counting «bound effect» when the chain started to carry the losses of the company from related industries.

For many global exporters release huge niche in the Russian food market was a godsend. It should be noted that the intrigue around the changing situation on the market of imported agricultural and food products Russia still persists. For the Central Asian trends in the Russian market of strategic interest because it is one of the largest in Eurasia and will largely determine the agricultural and livestock policies of the large number of exporters.

Central Asian countries to act more promptly began Uzbekistan - the largest producer of fruits and vegetables in the region and on many items Turkey direct competitor - the main exporter of fruits and vegetables of the market before the end of 2015.

Production of fruits and vegetables has a long tradition in Uzbekistan and prospects. Natural and climatic conditions of the country are favorable for growing a variety of vegetables and fruits that have excellent taste. Fruit and vegetable products produced in the country, has unmatched flavor. Uzbekistan has long been famous in foreign markets for its grapes and apples,

peaches and pears, cherries and plums, quince, watermelon and melon. In the republic are grown subtropical plants like figs, pomegranates, persimmons, etc.

A significant part of the agricultural land in almost all regions of the country is suitable for the production of fruits and vegetables.

Production of fruits and vegetables is one of the sectors that have all the basic conditions for rapid growth. In Uzbekistan, the volume of production of agricultural raw materials is increasing annually, there is a significant labor potential, many processing plants retrofitted with modern equipment.

STATEMENTS

Capacity of production and export of fresh and processed fruit and vegetable products, the implementation of the existing potential in this area may be an important factor in the growth and diversification of exports, reduce the vulnerability of the macroeconomic situation of the unstable situation on the world commodity markets, create new jobs and increase the real incomes of the population, especially in countryside. All this will contribute not only to accelerate the pace of economic growth, but also the strengthening of macroeconomic and social stability.

Data on the status of fruit and vegetable production in Uzbekistan for 2011-2014, has several points of interest:

- if the proportion of area under fruit and vegetable products in the total cultivated area in 2011 (650.7 thousand hectares) was 18%, then in 2014 (705.1

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thousand hectares), their share rose to 19.2% (of which, the area for Fruit and Berry plantings increased from 244.3 thousand hectares to 261.9 thousand hectares of vineyards with 111.5 thousand hectares to 119.4 hectares, potatoes from 73.6 thousand hectares to 80.3 hectares, vegetables with 175.4 thousand hectares to 192.0 hectares and 45.9 hectares of plantations of food to 51.5 thousand hectares) [1];

- there is a steady growth in production volumes of almost all types of fruits and vegetables, which is due mainly to an increase in their productivity;

- if the proportion of perennial crops (fruits and berries, grapes) in the sowing area under fruit and vegetable production, substantially higher than their share in the cost of the produced fruit and vegetables, then vegetables and potatoes the opposite is true. In particular, under the fruit and berries it employs about 37% of the cultivated area under fruit and vegetable crops, and their share in the cost of fruit and vegetable products produced is about 25%. The corresponding figures for the grapes are, respectively, 22% and 14%, and for vegetables - 25% and 37%. While a decrease in the gap for the years under consideration, such a situation, most likely due to less labor-intensive and material of perennial plants. Only a fraction of melons in the cultivated area and in the value of fruit and vegetable products produced about the same and amounts to about 6.5%;

- produced as a result of reforms in the agricultural sector, the share of farms decreases annually and an increasing proportion of farms and farmers in particular on all indicators of fruit and vegetable products;

- reform in agriculture is becoming an important factor in productivity growth and increase in production of fruits and vegetables. In particular, the main factor of growth in the production of fruit and vegetables decrease in the share becomes partnership increasing the share of farming enterprises that have higher yields. This is due to a higher yield of all kinds of fruits and vegetables at the farm, and especially agriculturist farms, whose share in the total sown area of fruits and vegetables is increasing. For example, the yield of agriculturist farms of fruits and berries 1.83 times higher than that of farms, and 2.51 times higher than that of partnership, the corresponding figures for vegetables are 1.3 and 1.4 times, grapes 1.85 and 1.87 times, melons - 1.6 and 2.0 times, potatoes - 1.35 and 1.47 times. There is a big difference in the yield of fruits and vegetables between the different forms of management says there is significant potential to increase productivity and production by improving the economic mechanisms that enhance the independence of business entities and interest in the results of its activities [2].

Fruit and vegetable products produced in agriculture is realized: a) population for fresh consumption; b) is exported in fresh form; c) is supplied as raw material processing sector. A fruit and vegetable products processing industry, in turn, sold domestically and exported. From the competitiveness of producers of fresh fruit and vegetables, and fruit and vegetable processing fishery products depends largely on the possibility of raising the living standards of the population. Particular importance is the export promotion, both fresh and processed fruit and vegetable products.

According to statistics, the physical volume of exports of fruit and vegetables from Uzbekistan grows every year. If the figure in 2000 amounted to 387.4 thousand

tons, it is only in the first quarter of 2016 - 95 thousand tons, at 80% was exported to Russia. According to the Russian side of the Uzbek import of agricultural products in 2015 increased overall by 10%, and in some positions even more. Thus, the volume of imports of grapes increased by 20 times, and citrus - 54 times.

Despite the dynamic growth of the volume of fresh fruit and vegetable exports in recent years, there has been a drop in revenue from its exports in recent years. The main reason for the decline of the value of exports of fresh fruit and vegetables has been a significant decline in export prices for major crops. To date, the bulk of the fresh fruit and vegetables exports are fresh and dried grapes, dried vegetables (17.1%), onion (8.8%), tomato (7.4%), melons and watermelons (6.5%), nuts (6.0%), apricots, cherries, peaches and plums (4.8%) and dried fruit (4.2%).

As the analysis of the current situation, the main constraint of fresh fruit and vegetable exports growth driver in recent years was the lack of conditions for specialization in its production and sales. After all, the world market is fierce competition for markets. The implementation of any product abroad requires market research study of the demand for products, advertising of their products, the use of appropriate expensive means of transport - refrigerators, contracts for the supply, and if it is necessary to protect its interests in court.

All this under the force of large enterprises and small and medium businesses, as a rule, independently on the foreign market does not come out, it would be for specialized trading companies. Hence the need to create favorable conditions for the trading and intermediary companies (cooperatives) that buy from manufacturers and export of fruits and vegetables. So trade and intermediaries - firms and cooperatives must provide the same favorable terms, which exist for producers-exporters. From the dissemination of existing tax incentives for manufacturers-exporters of trade and intermediary firms would benefit not only the manufacturers of export goods as a result of increased demand and corresponding prices for their products increase, but also the economy as a whole - both as a result of export growth and efficiency gains export operations.

CONCLUSIONS

In underdeveloped producers of fruits and vegetables of the financial market, especially private farms, prefer to sell their products for cash, and legal entities - exporters have difficulties in access to cash. For this reason, the export of fresh fruit and vegetable production is mainly carried out by individuals who have limited opportunities to use modern tools to promote products to foreign markets. This results:

1. The lack of marketing approach to the organization of production, the inability of the existing mechanisms of production and export of the changing economic conditions. In particular, the vast majority of fresh fruits and vegetables produced by small farms and farms for which the organization of production based on the study of the needs of local and foreign consumers, the choice of varieties and updated depending on the preferences of consumers and the expected market conditions is not possible. For this reason, all activities of producers of fruits and vegetables is reduced to the suggestion that the

implementation of products manufactured. At the same time, the export is carried out mostly by individuals who offer products to foreign consumers without appropriate sorting, labeling and packaging;

2. As a consequence of the lack of a marketing approach to the organization and implementation of fruits and vegetables, many foreign potential customers do not know about the unique taste of the Uzbek fruits, melons, and vegetables, and small producers are not able to pursue an active advertising campaign. On foreign markets virtually no trade and brand names of Uzbek fruit and vegetables;

3. As the results of the study, many of the local producers on the basis of experience in the implementation of fruits and vegetables would grow those varieties that are in demand heightened. However, the lack of financial resources and access to credit significantly limits their opportunities. This is especially true of perennial crops - grapes, apples, pears and other fruits.

In agriculturist and private farms lack not only expertise, but also sufficient financial resources for the implementation of export activities. As international experience shows, to independently enter the international market, the company should have a sufficient volume of transactions (and profits) in the domestic market, but in order to conduct market research - to create a network of sales abroad only to large enterprises, and small and medium-sized businesses, as a rule, independently on the foreign market does not come out, are engaged in the specialized trade and intermediary firms and companies.

For the same reason, most optimal way of effective use of existing potential in the field of fresh fruit and vegetable export trade is to stimulate the creation of intermediary companies or cooperatives of agricultural producers for the implementation of their products in the domestic and foreign markets.

Development of specialization in agriculture, the separation of production functions from the sale of products by stimulating the development of trade and intermediary firms or cooperatives of agricultural producers for the implementation of their products is in itself can be an important factor in the growth of the efficiency of the fruit and vegetable industry of the republic. An important factor in increasing the efficiency of its production and exports could be an opportunity to achieve economies of scale and adapt the structure, type and grade of products in accordance with customer requests will help sell their products at higher and more stable prices, lower unit transport costs to supply on the basis of pre-detainees contracts with wholesale customers and, if necessary, to defend their interests in court, form the brand and trademarks of Uzbek fruit and vegetable products abroad.

The solution to all these problems, individual small farmers are unlikely to be possible, and encourage the development of trade and intermediary firms, dealing with these problems more professionally and efficiently, can be a crucial factor in the growth of production and export of fruit and vegetable products.

Uzbekistan the most consistent of all the Central Asian countries began to prepare a solid foundation for long-term presence in the Russian market. With this purpose, a separate Decree of the President of the

Republic of Uzbekistan in april 2016 established a specialized foreign trade company «Uzagroeksport» The objectives of the creation of a new company in the document listed more efficient use of the country's export potential and rapid development of modern trade and logistics infrastructure to promote exports. The establishment of this specialized structure should increase the effectiveness of steps to explore the possibilities of long-term contracts with major networks of hypermarkets and working out the logistics of supply, which will give an incentive to more confidently invest heavily in agriculture and related infrastructure.

As part of its «Uzagroeksport» will conduct marketing research situation of the world and regional markets for fruit and vegetables, promotion of domestic products to export, and search for new markets. The objectives of the company are also included development of material-technical base of its member companies and organizations with foreign investments, the introduction of modern logistics system to promote products for export and pre-export organization of its preparation (sorting, grading and packing). When the new company will operate a quality management system and standardize the Centre «Food Laboratory» and specialized transport and logistics company, as well as trade and logistics centers in Tashkent and other regions.

As a result of the reforms since the beginning of 2016 Uzbekistan signed a long-term and 176 short-term contracts with foreign companies and partners, including Russia, to supply more than 1.27 million tons of fruits and vegetables totaling more than 1.37 billion US dollars.

It should be noted that the ability to respond quickly to changing market conditions, both on the Russian market and the world market, as laid down previously adopted programs for the development of agriculture, creation of infrastructure for the processing and storage of products. At the same time, Uzbekistan has continued to take measures to further increase its export potential including in the Russian direction. In the period of 2016-2020 years will be invested 595.9 million USD in the food industry with a view to increasing the processing and export of fresh fruits and vegetables by 2.7 times (up to 1.5 mln. tons). Also, it is planned to master production of about 200 items of new products. To stimulate exports within 5 years will be built 15 commercial and logistics centers in the regions of the country with a total capacity of 60 thousand tn.

It is known that fruit and vegetable export markets are attractive because in the harvest season provide higher profit margins than the domestic market of Uzbekistan. On the other hand the winter in Uzbekistan prices for fresh fruit and vegetables many times higher than summer rates and may provide even greater profitability, if the manufacturers have «the ability to hold the crop before winter».

A clear sign of the emergence of such a possibility is a situation where the production of fresh fruits and vegetables is increasing, and the volume of its exports are falling. It is obvious that the system shift caused by the active development of the market infrastructure has occurred in the industry.

In 2010, the Cabinet of Ministers of Uzbekistan adopted a national program of development and strengthening material-technical base of the storage of horticultural products in 2011-2015. The program

included the construction of new and reconstruction of existing cold rooms for storage of fruits and vegetables. As a result of this program, the number of operating cold stores has almost doubled - from 461 in 201 to 828 in the first 9 months of 2015, and their total capacity has tripled from 95 thousand tons in 2010 to 347 thousand tons in the first 9 months of 2015 [3-5].

In general, the market, there are two types of key services. The first - direct services of storage products in a refrigerated state. The second type of service involves assistance in finding a market with the adoption of fresh produce storage. Under this type of service can be identified one promising segment - redemption refrigerating enterprise product from the manufacturer with subsequent storage for a period of buyer's search. The share of the first in the market type is 55-60% of the total market, the second 40-45%.

Analyzing the current state of the storage market of fruits and vegetables it can be concluded that the market potential has not yet been disclosed. This is indicated on the one hand, the continuing preference of agricultural producers to ship their own crops to markets, including export, and on the other - the continuing high rate of construction of new cold storage facilities. In our opinion, the creation of a kind of «exchange of refrigerating capacity» could be the solution of the problem of incomplete loading of refrigeration capacity at certain times of the year, which is typical of this market. However, such an exchange, in turn, be able to work effectively in addressing the continuing development of fruits and vegetables logistics system.

Not all fresh fruits and vegetables withstand prolonged storage, while the canned or dried they may be stored for a long time without losing their beneficial properties. Recycling little transportable and perishable raw materials - vegetables, fruits and berries - in the long-lasting food products, the industry contributes to a fuller use of the country's export potential and enables the population of the republic to consume canned and dried foods rich in minerals and vitamins throughout the year.

Availability industry for processing agricultural products, capable of producing competitive products in foreign markets is an essential condition for economic growth of the country, where agriculture has a significant share in the gross domestic product. The development of the processing industry and export capacity of its potential allow to diversify exports and increase revenue from it, as well as reduce the risk of fluctuations in the prices of agricultural commodities on foreign markets.

The bulk of the fruit and vegetable processing industry is concentrated in the areas with the best climate and the greatest concentration of population (Samarkand, Andijan, Namangan, Ferghana, Tashkent, Kashkadarya and Surkhandarya regions), which creates the conditions for its sustainable development and the maintenance of price competitiveness.

The main products produced by the enterprises of the fruit and vegetable industry, are tomato paste, concentrated juice, canned fruit and vegetables, including

pickled and canned vegetables, juices, compotes, jams, purees. The whole range of manufactured products includes more than 190 names and is updated every year by expanding the use of local raw materials.

According to the analysis, the most pressing challenge to the capacity of exports of fresh fruit and vegetables, is the lack of development of the institute of trade intermediation. Stimulating the development of trade and intermediary firms or cooperatives of agricultural producers for the implementation of their products would lead to economies of scale, to coordinate their activities with those of related industries, to arrange the sale of products on the basis of the marketing approach, creating the image of the country's fruit and vegetable products in foreign markets. To do this, include: improving access to credit to producers of fresh produce, distribution of fiscal incentives that exist for exporting producers in the activities of trade and intermediary firms.

The analysis shows that the major development challenges of fruit and vegetable industry are: raw material needs of the mismatch processing plants, energy-intensive and outdated technology, high level, low selling price of fruits and vegetables due to lack of marketing approach to the organization of production and sales and other.

To stimulate the development of production and exports of fruits and vegetables offered implementation and integration of processing and agricultural enterprises, which involves the transfer of long-term lease of land processing enterprises to create their own raw material base. Also, it is advisable to review of import conditions on packaging materials, a wide range of enzymes, dyes and additives, development of leasing equipment for the fruit and vegetable industry, the liberalization of the form of payment on export contracts, etc.

The implementation of additional measures for the further development of vertically integrated agro-industrial complexes can be an important quality factor and quantitative improvements to attract investment for modernization and technological re-equipment of enterprises and achieve sustainable growth of fruit and vegetable industry of the country.

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