

Prospects for import substitution in the fruit market of Ukraine

Objective. To reveal the peculiarities of the formation of market capacity through import of fruit supplies and to determine the prospects for import substitution. **Methods.** Monographic, balance, constructive-calculation, correlation-regression analysis, etc. **Results** The features of import operations on the domestic fruit market are shown. The capacity of the market of imported fruits and the prospect of import substitution as a non-tariff method of regulation of foreign trade in the conditions of the formation of the European Union Trade Union Brigades and membership in the ITC are determined. **Conclusions** It is assumed that the process of import substitution with the fruits of domestic production in the near future by volume will be limited.

Key words: market, fruits, import substitution, customs tariff, demand, supply.

Slow development of the gardening industry in Ukraine, insufficient market capacity and low level of population support by the fruits are the main reasons that stimulate the annual expansion of their product offer for the account of import deliveries. So, among the products of plant growing, imported to Ukraine, the fruits are the leaders (more than 45%). The balance of foreign trade for a long time is negative. During 2000-2013, imports increased exports by 8 - 28 times. Among the imported fruits, a significant proportion is the fruit that has high growth potential in Ukraine, including apples. Therefore, from the standpoint of food security and the formation of a competitive market environment, the study of the prospects of import substitution with the fruits of domestic production is relevant. Studies of the development of foreign trade with fruits and berries at different times are devoted to the works of O.Yu. Ermakova, T.A. Markina, VA Rul'ev, GM Satina, L.P. Simirenko, D.F. Chukhna, O.M. Shestopala, PG Shitta, AI Shoemake and other scholars. However, due to WTO membership, changes in terms of trade, increase in product quality requirements, the establishment of a Deep and Comprehensive Free Trade Area (FTA) with the EU, the issues of development of foreign trade operations and the prospect of import substitution with high potential fruits remain insufficiently studied. Production in Ukraine. The purpose of the research is to reveal the peculiarities of the formation of market capacity at the expense of import deliveries of fruits and to determine the prospects of import substitution. Research methodology. The research was based on methodological approaches to determining the capacity of the internal consumer market for agricultural products and food [1, 10]. Research results. In the market of imported fruits in Ukraine, the economic situation since 2009 is related to the accession to the WTO and the reduction of import tariffs in accordance with the Law of Ukraine "On Amendments to the Law of Ukraine" On Customs and Tariff of Ukraine ", remains virtually unchanged. By volume of deliveries [4, 6]. Thus, during the period of 2009 - 2013 there is an import stability of 838 - 880 thousand tons (Table 1). In the formation of the capacity of the home-nya market, the share of imports is 57 - 70%. There are changes in the structure of the flow of fruits, in particular a significant decrease in imports for the group 0808 - grain fruits (apples, pears, quinoa) - 4.2 times in 2013 compared to 2009. This indicates a decrease in the import dependence of these fruits and Due to the fact that it is the apples that make up the main share (54-60%) in domestic fruit production, which significantly expanded from the year of 2009-2013 - from 853 to 1211 thousand tons. Due to this, imports from Poland, Which is the main supplier of apples to the domestic market (95%), declined significantly. At the same time, there is a high level of self-sufficiency of households, which produce an average of 73% (696 thousand tons) of apples and about 70-75% of them use for their own consumption [7, 8]. In the volume of imported fresh fruit supplies, on average 5 years (2009-2013) citrus was 45.8%, bananas - 28.2, apples, pears and quinoa - 17.2, apricots, cherries,

cherries, peaches, Plums - 6%. Given that fruit production in recent years has increased by only 6-15%, in particular to 2159 thousand tons in 2013, while import revenues have remained largely stable, it can be argued that the formation of demand in the domestic market is significantly dependent on a segment of imported fruit. The value of imported fruit in 2013 compared to 2009 has doubled and amounted to UAH 7.9 billion (Table 2). This was due to rising prices for citrus fruits by 1.6 times (up to UAH 8.4 / kg) and bananas - by 2.1 times (up to UAH 9.5 / kg), which on average in 2009 - 2013 made up 74.7% (UAH 4.2 billion) of the total import value. The cost of grain seeds (mainly apples) increased 5.5 times (up to 9.9 UAH / kg), with a 4.2-fold decrease in import volumes.

1. Imports of fruit in Ukraine, ths. T
2. Cost of imported fruit supplies in Ukraine, m

During 2000-2013, Ukraine had a negative foreign trade surplus in fresh fruits. In particular, import deliveries exceeded export volumes by 28 times in 2000-2002, from 2003 to 2005 - 15, 2006 - 2008 - 19, 2009 -2013 - 8-12 times. This situation shows a slight expansion of export supply of fruits (during 2009-2012 from 101 to 179 thousand tons) and the constancy of their import revenues. In our opinion, the introduction of fruits, which is essentially objectively necessary for imports (mainly citrus and bananas), in the future will expand (to 28 kg per person per year in 2020), because the demand for them is high and tends to increase - from 12.1 kg in 2009 to 15.3 kg in 2013. In addition, there are no customs barriers for these fruits (zero rate). It should be noted that the comparison of import tariffs between Ukraine and the EU for a fruitful introduction proves in favor of our country at the maximum tariff of the final binding rate of customs duties - respectively, 20 and 170%, and the average rate of the customs duty of the most favored nation regime - 9.9 and 11.5%. The average final binding rate of the Ukrainian duty exceeds the level of the binding rate of EU customs duties by 2.7% (correspondingly 13.1 and 10.4%) [5, 8]. Consequently, the level of customs tariffs in the conditions of constancy or insignificant expansion of domestic production of fruits by all categories of farms to the volume of imports practically does not affect. Since there is virtually no need for their change, in the short term their influence can be eliminated. The share of the value of the market for imported fruit in 2013 was more than 50% of the total value of fruit market capacity in Ukraine, which is about 10 billion USD. The cost of capacity of the market for imported grain and stone fruit in 2013 has doubled compared to 2007 (before accession to the WTO) - up to UAH 2.5 billion, while these fruits have a fairly high potential for cultivation in Ukraine, and their sales can replenish additional revenues to the state budget rather than concentrate on the accounts of oligopolistic importers. According to our sub-calculations, the import substitution of domestic grains (seeds, beans and nuts) is possible on the average for 2009 - 2013 by 1 person per year to 6 kg. In the near future (by 2020) it is expected to increase the production of fruits mainly at the expense of households to 2.1 million tons. Importation in the market of fresh fruit at their expense may be about 100 thousand tons, gardening enterprises - up to 150 thousand t, which in total will make only 5.8 kg per person per year, if necessary, 15 - 17 kg. The main suppliers of imported products to the domestic fruit market are the countries of Europe and Asia. For example, in 2013, among the importers, there were: Poland - apples (95% or 52.7 thousand tons), Turkey, Egypt - citrus fruits (65% or 289), Spain, Greece - peaches and nectarines (79%, Or 29), Ecuador - bananas (87% or 230), Indonesia, Vietnam - nuts: coconut, cashew, brazilian (79% or 2.9), Iran, Turkey, USA, Georgia - other species Nuts (98%, or 6.4 thousand tons). It should be noted that in the context of liberalization of trade, import substitution as a non-tariff method of limiting fruit imports may further negatively affect the efficiency of gardening at the innovation level, since it restricts competition and reduces the motivation for innovations in the production of high-quality products. From this, SM Kvasha, on the basis of the research of foreign economic activity of other countries, emphasizes the need for careful application of the import substitution strategy. However, import-substituting production can be seen as measures to achieve food security and the formation of a competitive, aggressive environment for domestic agribusiness [2]. In our opinion, the import of fetuses with high growth potential in Ukraine is now an incentive for the development of their industrial production, which will further contribute to raising the level of population support (the fruits of domestic production are

cheaper than imported, which is very important for low solvent demand) And to replenish the state budget.

Conclusions

Instability of the economic situation in the country (deficit of the budget, reduction of expenditures on the development of agricultural sectors, increase of prices for energy resources and foodstuffs, low solvency of the population, etc.), lack of financial resources, even for the simple reproduction of perennial plantings The main factors behind the slowdown in the development of industrial horticulture. At the same time, it should be recalled about the effectiveness of state support, in particular, financing from the special fund (by 1% from 2011, and in the future - 1.5% of the fee in accordance with the Law of Ukraine "On the charge for the development of self-government, Gardening and hopping "from 09.04.1999, number 587-XIV), due to which the decline of the field of horticulture managed to suspend. The production and volumes of fruit realization by farms of the population have remained practically stable for a long time. Taking into account the above, we believe that the process of import substitution by the fruits of domestic production in the near future by volume will be limited (up to 250 thousand tons).

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