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NAS RK is pleased to announce that Bulletin of NAS RK scientific journal has been accepted for indexing in the Emerging Sources Citation Index, a new edition of Web of Science. Content in this index is under consideration by Clarivate Analytics to be accepted in the Science Citation Index Expanded, the Social Sciences Citation Index, and the Arts & Humanities Citation Index. The quality and depth of content Web of Science offers to researchers, authors, publishers, and institutions sets it apart from other research databases. The inclusion of Bulletin of NAS RK in the Emerging Sources Citation Index demonstrates our dedication to providing the most relevant and influential multidiscipline content to our community.

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НАН РК сообщает, что научный журнал «Вестник НАН РК» был принят для индексирования в Emerging Sources Citation Index, обновленной версии Web of Science. Содержание в этом индексировании находится в стадии рассмотрения компанией Clarivate Analytics для дальнейшего принятия журнала в the Science Citation Index Expanded, the Social Sciences Citation Index и the Arts & Humanities Citation Index. Web of Science предлагает качество и глубину контента для исследователей, авторов, издателей и учреждений. Включение Вестника НАН РК в Emerging Sources Citation Index демонстрирует нашу приверженность к наиболее актуальному и влиятельному мультидисциплинарному контенту для нашего сообщества.

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ON IMPORT SUBSTITUTION OF THE MEAT INDUSTRY FOR PROVIDING FUNCTIONS OF SOCIAL PROTECTION OF POPULATION: FEATURES AND ANALYSIS

Abstract. The idea of import substitution, as well as its attendant problems and challenges, arise permanently and becomes relevant for national economies within the framework of national security concepts and socio-economic development strategies of different countries. Russia is no exception and ensuring social protection of the population is paramount for the sustainability of the interaction of social institutions and ensuring food and economic security in general at the regional and country levels. The meat and meat products market, being the largest segment of the domestic food market, has a significant impact on the country's food supply. The presented study describes the features of domestic meat industry development in implementation of import substitution programs. Solving the problems of import substitution is not an instant procedure[3]. This is a set of long-term measures, in the implementation of which state bodies at all levels, business itself, and local governments should take part. The purpose of the work is to show the problems that the industry is facing at the present stage, the directions of their solutions and the tasks of the state in this mechanism.

The current state of the industry, the volume of its financial support have been analyzed in the study. The state support of import substitution in the industry and its results are examined in detail. Based on data on the current state, the main problems of the development of the industry have been identified, the dynamics of import substitution in it has been shown, there have been formulated recommendations for the effective development of the industry in the long term.

Keywords: competitiveness, sanctions, meat production, innovation, import substitution strategy, development, government regulation, social protection of the population.

Introduction. The foreign economic policy of Russia over the past five years has been largely determined by the policy of sanctions by Western countries and the introduction of retaliatory measures, which besides everything have a protectionist nature. At the same time, the course towards import substitution was taken several years earlier and was declared by the state as an instrument for reviving the domestic economy. However, as practice has shown, there is no reason to talk about a fundamental reversal to protectionism. To a large extent, this is due to increased state support for manufacturers and exporters, as well as the active use of foreign technologies, components and raw materials. Participation in the global economy in the modern age of the internationalization of production and digital transformation requires mandatory inclusion in global value chains, which to some extent contradicts the literal understanding of the course on import substitution [7].

However, the formulation of such a problem is not new. Consistently and purposefully, the course on import substitution was carried out by Latin American countries in the 1950-1980s. In the USSR, the policy of replacing imports from the West with products from Soviet enterprises, and in the post-war

period, also from enterprises of the countries of the socialist community was almost the main component of foreign economic policy.

Materials and methods (model). General scientific research methods in the framework of comparative and statistical analysis have been applied in the study.

Results and discussion. Over the past 25 years, the market for meat and meat products has undergone significant changes. In the 1990s, support for the meat industry included: state subsidies for the production of livestock products, the development of poultry and livestock breeding, the purchase of feed, the maintenance of the veterinary service and the development of insurance. Despite this, government support for the meat industry was insufficient and was one of the main causes of the crisis in the industry. For example, the size of government subsidies to beef producers from its retail price decreased from 230% (1989) to 10% (1993).

After the default in August 1998, imported meat products cost rose sharply in the meat products market, which contributed to an increase in the competitiveness of domestic goods and a reduction in imports. The national currency depreciation in 1998 played a positive role in import substitution in the meat market and the decline was replaced by a boom. A sharp drop in livestock and poultry numbers was halted, while livestock and poultry production and livestock profitability were increasing. In the domestic market, from December 1998 to 2004, there was a substitution of imported products with domestic products and a decrease in the share of meat imports in total domestic consumption. Despite the successes achieved, the development indices of the meat industry in 2007 were lower than those for 1990 and lagged by several times compared to the countries that are leaders in the production of meat products.

The implementation of the national project "Development of the agro-industrial complex" revealed the following problems in the field of state support for the agro-industrial complex. The issuance of subsidized loans was difficult for agricultural producers due to the lack of adequate collateral for loan repayments. The national project did not provide for the allocation of funds to improve the food supply for animals and improve veterinary services. When developing the terms of the national project, the production cycle for livestock products was not taken into account (3-4 months for poultry and up to 1.5 years for cattle) [14].

Achieving the financial sustainability of agricultural producers and regulating the market for agricultural products, food and raw materials were the basis of the "State program for the development of agriculture and regulation of agricultural markets, raw materials and food for 2008-2012." To achieve the goals, financing of this program compared to the national project "Development of the agro-industrial complex", taking into account all sources, was increased by 26 times. The state program, along with standard forms of support, also included support for small businesses and risk insurance. From 2008 to 2012, the volume of subsidized loans and loans to farms, agricultural cooperatives, and personal subsidiary plots increased by 25%. The development of family livestock farms received subsidies of 1.5 billion rubles. The selection of investment projects began to be carried out on a competitive basis. The demand for investment lending and short-term seasonal lending has shown the effectiveness of these support measures.

The main objectives of the "State Program for the Development of Agriculture and the Regulation of Agricultural Products, Raw Materials and Food Markets for 2013-2020" include: ensuring the country's food security, developing import substitution for the main livestock and crop products, increasing the competitiveness and marketability of domestic products in world and domestic markets, the formation of territorial clusters, food sub-complexes and innovative agribusiness [9].

An important indicator of the effectiveness of state subsidies to manufacturers, which allows a comprehensive assessment of the influence of the state, is the producer support coefficient for a single product - PSST. When calculating PSST, support measures that affect consumer and producer prices, direct transfers from taxpayers to producers, support measures that reduce production costs in the long run, measures that reduce the cost of raw materials, and other measures (tax benefits, etc.) are taken into account). The average annual PSST in the period from 2001 to 2014 compared to the above period for Russian poultry producers increased by 4.23 times, for pork producers - 7 times, and for beef producers - became positive.

As part of the support and activation of import substitution processes, the state is currently implementing a number of measures, which are systematically presented in figure 1.

These measures can be classified into regulatory and financial.



Figure 1 – The main measures to support import substitution in Russia.
Note: developed by the authors on the basis of Internet resources

In order to increase the availability of borrowed resources for agricultural producers in 2018, the following government support measures were implemented in the framework of the project “Promoting Investment Activities in the Agro-Industrial Complex”:

- reimbursement of a part of the interest rate on investment loans (loans) received until December 31, 2016 inclusive;
- reimbursement of a part of the direct costs incurred by agricultural producers for the creation and (or) modernization of agricultural facilities;
- Support for preferential lending to agricultural enterprises. Preferential lending is that producers can receive short-term or investment loans at one of the banks authorized by the Ministry of Agriculture of Russia at a rate of no more than 5%. Reimbursement to a credit institution for lost income occurs directly from the federal budget in the amount of the Bank of Russia key rate.

Tax incentives include tax incentives for corporate income tax, corporate property tax [17].

In the structure of subsidies, one can distinguish a compensation for part of the interest rate on bank loans received for the implementation of projects.

In 2013, Russia accounted for almost 59% of the total consumption of beef in Russia, the share of pork imported from abroad reached 31%, poultry meat - 13%. Obviously, the dependence on imports was significant. In 2014, due to the embargo, the supply of pork decreased by 42%, beef - by 7%, poultry - by almost 20%. The main production is concentrated in the European part of Russia: in the Central Federal District (34%) and the Volga Federal District (21.3%), which is primarily due to the high population density and low transportation leg relative to the Asian part of Russia.

Meat proposal (thousand tons)

	2014	2015	2016	2017	2018
Proposal (thousand tons)	11658,2	11651,7	11856,4	12345,7	12420,9
Dynamics (% to the previous year)	–	-0,1	1,8	4,1	0,6

Note: developed by the authors on the basis of Internet resources

In 2014-2018, the meat supply on the Russian market grew by 6.5%: from 11.66 to 12.42 million tons. The largest increase in supply compared to previous years was observed in 2017 - by 4.1%, which was due to the growth of domestic production by 4.9%. 2015 was the only year in the five-year period when the value of the indicator decreased by 0.1% compared to the previous year - this was due to a decrease in imports by 31.2% compared to 2014.

Since 2014, there has been a reduction in import supplies for many food resources, including meat and meat products.

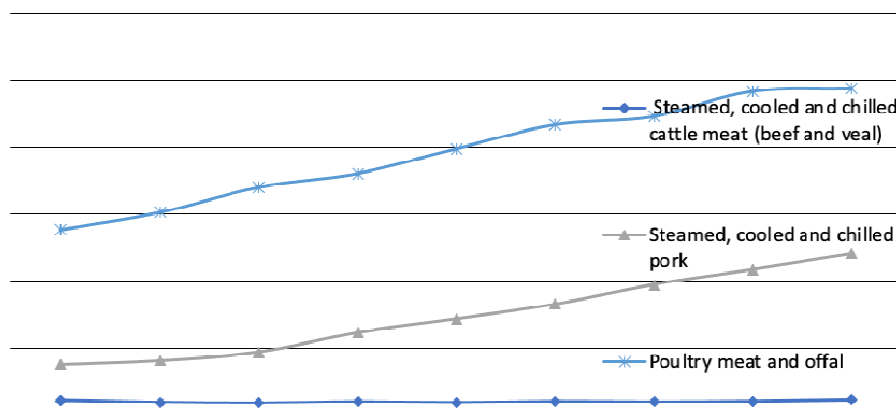


Figure 2 – Production of the main types of import-substituting food products in the Russian Federation ¹⁾ (thousand tons).
Note: developed by the authors on the basis of Internet resources

The largest shares in Russian meat production are poultry and pork (figure 2). Russia's growth in production and consumption of poultry meat is due to a decrease in the real income level of citizens who are beginning to look for alternative and cheap sources of animal protein. If we consider consumer activity within the segment of production and manufacture of poultry meat, the main share falls on chicken. In the context of the population's attraction to healthy lifestyle, there is an increase in demand for turkey [9].

In 2014-2018, pork production grew at the fastest pace in Russia: over 5 years, growth amounted to 24.9%, which was largely due to state support for this industry over the past two decades.

According to the Federal State Statistics Service, 75 kg of meat products is consumed per one resident of Russia. The indicator is high, especially in compare with the global, which is 43 kg. The distribution occurs in groups in this way:

- Poultry meat and its derivatives – 31,5 kg;
- Pork and its processed products – 20,9 kg;
- Beef and its meat products – 10,7 kg;
- Other types – 11,9 kg.

The modern pace of life significantly affects consumer preferences. Residents of megacities have a significant lack of time for preparing homemade food. They tend to eat well and tasty at home, but with minimal time. Consumption of meat semi-finished products helps in solving this issue. Manufacturers are gradually able to destroy the stereotype that has developed decades ago about the harmfulness and carcinogenicity of convenience foods. It is noted that consumer demand is growing in the high and middle price segment.

The indicators for the first half of 2019 indicate that the meat and meat processing industry continues to develop dynamically. In all groups of goods and directions, an increase in volumes is observed, in comparison with the same period in 2018:

- canned meat – 8%;
- semi-finished products – 10.1%;
- meat and offal – 9.2%;
- sausage products – 0,6%.

A slight pullback was seen in the offal and poultry segment.

The overall results of the statistics allowed the government to talk about solving the tasks.

At the same time, we have to note the fact that the increase in production in the agricultural sector cannot be called a breakthrough, and also that the decrease in competition in the market and the replacement of imported products with domestic ones led to an increase in food prices in the country. In June 2019, the cost of goods was increased significantly. The last time such a sharp increase was noted in 2015. For example, in St. Petersburg, according to the Federal State Statistics Service, in June 2019, pork

and chicken were 8% and 11% respectively more expensive, and beef and frozen fish were 80% more expensive [6].

It is also important to consider that the growth in agricultural production is heavily reliant on foreign investment and the localization of production in Russia by global multinationals. For example, the partner of the leader of the domestic meat industry Miratorg is Genus plc, the largest TNC in the field of genetics. Agro-Belogorye, Cherkizovo and Friendship collaborate with it. "Kama Bacon" national company is a partner of the second most important global genetic company Topigs Norsvin.

The main directions of development of the meat industry in Russia at present are: structural and technological modernization of enterprises, import substitution, demand stimulation, business consolidation and diversification, creation of high value-added products, increasing productivity and efficiency, developing export potential, acquiring foreign assets and transferring the Russian model vertical integration, work in closed markets. Developing steakhouses, grill bars, burger and other restaurant formats contribute to the growth in meat consumption. Despite the apparent widespread spread of vegetarianism and veganism, according to Russian Public Opinion Research Center survey, conducted in the second half of 2018, only 1% of Russians refuse to consume meat. At the same time, 39% consider vegetarianism unhealthy. In this regard, talking about the serious impact of this factor on the market of meat and meat products is too early. So-called farm shops contribute to market growth. For older consumers, these stores are often associated with previously popular food markets, where you could choose the most liked piece of meat. Consumers are increasingly paying attention to the place of production and shifting their demand towards farm products, which are perceived as more natural. At the same time, it is influenced by changes in consumer behavior patterns, which can't no longer be ignored when developing new products and launching them on the market. Each manufacturer needs to look for the assortment structure that is suitable for him based on the chosen sales boundaries, price segment, characteristics of the target audience, production capabilities and marketing competencies. It can be expected that enterprises offering a wide range of semi-finished products and high-quality products of deep processing will turn out to be the most stable in the strategic perspective[11].

The weaknesses of the Russian meat industry compared with foreign manufacturers are as follows:

- 1) undeveloped system of federal price regulation;
- 2) insufficient organization of the rights protection of enterprises by state structures;
- 3) poor technical equipment of production;
- 4) low rate of implementation and application of innovative technologies, etc.

Conclusion. Since 2014, Russia has been deliberately adhering to the policy of import substitution. This course is not only designed to ensure the country's security, but it is essentially a key tool for developing the production base of the most important sectors, for which the dependence on imports of products, services, and technologies is very high.

After reducing imports from the West, Russia has increased its influence and presence in the markets of other countries: in particular, meat supplies from Belarus, Brazil and Argentina have increased. In addition, Russia has been able to reduce its dependence on imports of this product significantly. Sanctions and embargoes have positively affected the production of meat and meat offal. However, despite the proven positive effect of the impact of sanctions on the production of meat and meat products, it is necessary to take into account the identified existing threats to development. Due to the dominant role in the industry of large meat producers in an unstable economic situation, small producers go bankrupt. As a result, there is an artificial price increase by the main meat market players. In this regard, the course pursued by the Government of the Russian Federation on import substitution should be accompanied not only by an increase in investment in agriculture, but also by the support of small and medium-sized enterprises in this area [19].

Russia will be able to maintain high production growth rates and continue the development of the meat industry under a number of key conditions: maintaining the level and increasing the efficiency of state support, stimulating structural modernization of the entire production chain, the availability of financing for new projects and phasing out inefficient production, stimulating consolidation, import substitution, and dramatically improving the situation in the field of veterinary medicine. In addition, the state should create institutional conditions that will allow Russian business to ensure high rates of

economic growth and receive return on capital for conducting expanded reproduction of the innovative type [12].

Innovative technologies are, of course, not the only way in the development of the meat industry, which will ensure a technological breakthrough, but it is essentially the most important. And the essence of this issue is that if this key issue is not resolved, it is unlikely that it will be possible to use the advantages of other engines of scientific and technological progress. The resource and scientific and technical potential available in Russia can ensure the achievement of state goals in terms of economic growth and solving the problems of improving the well-being of the people only if the state creates comprehensive incentive measures to implement the achievements of scientific and technological progress in the development of the food complex in Russia.

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ХАЛЫҚТЫ ӘЛЕУМЕТТІК ҚОРҒАУ ФУНКЦИЯЛАРЫН ҚАМТАМАСЫЗ ЕТУ ҮШІН ЕТ ӨНЕРКӘСІБІН ИМПОРТПЕН АЛМАСТЫРУ ТУРАЛЫ: ЕРЕКШЕЛІКТЕРІ МЕН ТАЛДАУ

Аннотация. Зерттеуде халықты әлеуметтік қорғауды қамтамасыз ету үшін импортты алмастыру бағдарламаларын іске асыру аясында отандық ет өнеркәсібін дамыту ерекшеліктері әлеуметтік институттардың өзара қатынас тұрақтылығы және тұтастай алғанда өңірлер мен ел деңгейінде азық-түлік пен экономикалық қауіпсіздікті қамтамасыз етуде маңызды болып саналады. Авторлар импортты алмастыру мәселелерін шешу бірсатылы процедура еместігін атап өтті. Бұл – іске асыруға барлық деңгейдегі мемлекеттік органдар да, бизнестің өзі де, жергілікті өзін-өзі басқару органдары да қатысуы тиіс ұзақмерзімді шаралар кешені. Жұмыстың мақсаты – қазіргі кезеңдегі саланың барлық мәселелерін, оларды шешу бағыттарын және осы механизмдегі мемлекеттің міндеттерін көрсету.

Зерттеу барысында саланың қазіргі жағдайы, оны қаржылық қолдау мөлшері талданады. Өнеркәсіпте импортты алмастыруды мемлекеттік қолдау және оның нәтижелері жан-жақты талқыланады. Ағымдағы жағдай туралы деректерге сүйене отырып, саланы дамытудың негізгі мәселелері айқындалды, ондағы импортты алмастыру динамикасы көрсетілді, саланы ұзақмерзімді перспективада тиімді дамыту жөнінде ұсыныстар жасалды. Зерттеу барысында ет пен ет өнімдері нарығының оң динамикасы анықталды. Ресей Батыс санкциялары мен тыйым салған жағдайларға бейімделе алды, өндірісін ұлғайтты және сол арқылы импортқа тәуелділікті азайтты.

Соңғы бес жыл ішінде Ресейдің сыртқы экономикалық саясаты көбінесе батыс елдерінің санкция саясатымен және басқа да протекционистік сипаттағы жауап шараларын енгізу арқылы алдын ала анықталды.

Сонымен бірге импортты алмастыру бағыты бірнеше жыл бұрын жүргізіліп, мемлекет ішкі экономиканы қалпына келтіру құралы ретінде жариялады. Алайда тәжірибе көрсеткендей, протекционизмге түбегейлі бетбұрыс туралы айтуға негіз жоқ. Бұл көбінесе өндірушілер мен экспорттаушыларды мемлекеттік қолдаудың артуына, сондай-ақ шетелдік технология, компоненттер мен шикізатты белсенді қолдануға байланысты болып келеді. Өндірісті және цифрлық трансформацияны интернационалдандырудың қазіргі заманғы кезеңінде әлемдік экономикаға қатысу әлемдік құндылықтар тізбегіне міндетті түрде қатысуды қажет етеді әрі бұл белгілі бір дәрежеде импортты алмастыру бағытын түсінуге қайшы келеді.

Сонымен қатар, мұндай міндет бұрын да қойылған. Сәйкес және мақсатты түрде импортты алмастыру курсы Латин Америка елдері 1950-80 жылдары жүзеге асырды. КСРО-ның Батыстан импортты кеңестік кәсіпорындардың, соғыстан кейінгі кезеңде социалистік қауымдастық елдерінің кәсіпорын өнімдерімен алмастыру саясаты сыртқы экономикалық саясаттың негізгі құрамдас бөлігі болды. Елдегі экономикалық өсудің негізгі заңы – экспорттың тауар импортына қарағанда артық болуы. Импортты алмастыруды ілгерілету көптеген елдерде қолданылған және қазіргі кезде тәжірибеде бар. Импортты алмастыру – импорттық тауарларды отандық тауарларға ауыстыру. Импортты алмастыру бағдарламасын іске асыру үшін мемлекет бірнеше әдістерді қолдана алады, олар жеке де, жиынтықта да қолданылады: кедендік әдістер – импортталатын тауарларға кедендік баждың өскенін білдіреді; оның шеңберінде квоталар белгіленетін немесе тауарларды әкелуге белгілі бір рұқсат алу қажеттілігі енгізілген тарифтік емес әдістер; мемлекет аумағында тауар өндірісін ынталандыру.

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ОБ ИМПОРТОЗАМЕЩЕНИИ МЯСНОЙ ПРОМЫШЛЕННОСТИ ДЛЯ ОБЕСПЕЧЕНИЯ ФУНКЦИЙ СОЦИАЛЬНОЙ ЗАЩИТЫ НАСЕЛЕНИЯ: ОСОБЕННОСТИ И АНАЛИЗ

Аннотация. В представленном исследовании рассматриваются особенности развития отечественной мясной промышленности в свете реализации программ импортозамещения для обеспечения социальной защиты населения является первостепенным для устойчивости взаимодействия социальных институтов и обеспечения продовольственной и экономической безопасности в целом на уровне регионов и страны. Авторы отмечают, решение проблем импортозамещения – не одномоментная процедура. Это комплекс долгосрочных мер, в реализации которых должны принимать участие и государственные органы всех уровней, и сам бизнес, и органы местного самоуправления. Цель данной работы – показать все проблемы, с которыми сталкивается отрасль на современном этапе, направления их решений и задачи государства в этом механизме.

В исследовании проведен анализ текущего состояния отрасли, объемы ее финансовой поддержки. Подробно рассматривается государственная поддержка импортозамещения в отрасли и ее результаты. На основе данных о современном состоянии выявлены основные проблемы развития отрасли, показана динамика импортозамещения в ней, сформулированы рекомендации по эффективному развитию отрасли в долгосрочной перспективе. В исследовании выявлена положительная динамика на рынке мяса и мясных субпродуктов. Обосновывается тот факт, что Россия смогла адаптироваться к условиям западных санкций и эмбарго, нарастила свое производство и тем самым уменьшила свою зависимость от импорта.

Внешнеэкономическая политика России на протяжении последних пяти лет во многом предопределялась политикой санкций со стороны стран Запада и введением ответных мер, которые носили ко всему прочему и протекционистский характер. Вместе с тем, курс на импортозамещение был взят несколькими годами раньше и декларировался государством как инструмент возрождения отечественной экономики. Однако, как показала практика, нет оснований говорить о принципиальном развороте к протекционизму. В значительной мере это объясняется ростом государственной поддержки производителей и экспортеров, а также активным использованием зарубежных технологий, компонентов и исходных материалов. Участие в мировой экономике в современную эпоху интернационализации производства и цифровой трансформации предполагает обязательную включенность в глобальные стоимостные цепочки, что в известной мере противоречит буквальному пониманию курса на импортозамещение.

Вместе с тем, постановка подобной задачи не нова. Последовательно и целенаправленно курс на импортозамещение осуществлялся латиноамериканскими странами в 1950-1980-е годы. В СССР курс на замену импорта с Запада продукцией с советских предприятий, а в послевоенное время и с предприятий стран социалистического содружества был едва ли не главной составляющей внешнеэкономической политики.

Главный закон экономического роста в стране - превышение экспорта над импортом товаров. Поощрение импортозамещения использовалось многими странами и практикуется в настоящее время.

Импортозамещение - это процесс замещения импортных товаров отечественными.

Для реализации программы импортозамещения государство может использовать несколько методов, которые используются как по отдельности, так и в сочетании: таможенные методы - подразумевают повышение таможенных пошлин на ввозимые товары; нетарифные методы, в рамках которых устанавливаются квоты или вводится необходимость получения определенных разрешений на ввоз товаров; поощрение производства товаров на территории самого государства.

Ключевые слова: конкурентоспособность, санкции, мясное производство, инновации, стратегия импортозамещения, развитие, государственное регулирование, социальная защита населения.

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