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ИНТЕНСИВНОЕ САДОВОДСТВО В КЫРГЫЗСТАНЕ: МАРКЕТИНГОВЫЙ АСПЕКТ

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Сельское хозяйство как базовая отрасль Кыргызской Республики требует интенсификации, то есть повышения производительности за счет использования новых технологий. Сложившаяся в настоящее время ситуация неблагоприятным образом сказывается на рыночном потенциале отечественных экспортеров продуктов растениеводства. Технологическое отставание, отсутствие крупных инвестиций в данную отрасль, сильные позиции иностранных производителей на международном рынке привели к значительному снижению экспорта яблок из Кыргызстана. Одной из современных тенденций данной отрасли является интенсивное садоводство. Проведен маркетинговый анализ (STP-модель, описание основных мировых экспортеров и 4P рынка свежих яблок), анализ потребительского и целевого рынков; приведен список стран – крупнейших импортеров свежих яблок – в качестве потенциальных рынков; представлено позиционирование кыргызстанских яблок, описание мирового рынка данного продукта, каналы распределения свежих яблок на потенциальных рынках; дан анализ крупнейших экспортеров и мировых цен, а также рекомендации по выращиванию наиболее популярных сортов яблок и их продвижению.

Ключевые слова: интенсивное садоводство; сегментация; целевые рынки; позиционирование кыргызстанских яблок; крупнейшие производители яблок; мировые цены на яблоки.

КЫРГЫЗСТАНДАГЫ ИНТЕНСИВДҮҮ БАГБАНЧЫЛЫКТЫН МАРКЕТИНГДИК АСПЕКТИЛЕРИ

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Айыл чарбасы Кыргыз Республикасынын негизги тармагы катары, интенсивдештирүүнү талап кылат, башкача айтканда жаңы технологияларды пайдалануу менен өндүрүмдүүлүктү жогорулатуу. Азыркы мезгилде түзүлгөн кырдаал айыл чарба өсүмдүктөрүнүн өндүрүмдөрүн сыртка чыгаруучу ата мекендик экспортторлордун базардагы мүмкүнчүлүгүнө тескери таасирин тийгизүүдө. Технологиялык жактан артта калуулар, бул тармакта чоң инвестициянын жоктугу, эл аралык рынокто чет элдик өндүрүүчүлөрдүн күчтүү деңгээли Кыргызстандан алманы экспорттоонун олуттуу кыскарышына алып келди. Бул тармактагы заманбап тенденциялардын бири интенсивдүү багбанчылык болуп саналат. Бул макалада төмөнкүлөргө маркетингдик талдоо жүргүзүлгөн: STP-модель, негизги дүйнөлүк экспортторлордун баяндоолору жана рыноктогу жаңы алмалардын 4Pсы. Макаала керектөөчү рынокко талдоо жүргүзүүнү, максаттуу рынокту, артыкчылыктуу рынок катары жаңы алмаларды импорттоочу ири импортер-өлкөлөрдүн тизмесин, кыргыз алмаларынын орду, бул өндүрүмдүн дүйнөлүк рыногунун сүрөттөлүшүн, ири экспортторлорго талдоо жүргүзүүнү, абдан өтүмдүү алмалардын сортторун өстүрүү боюнча сунуштарды, дүйнөлүк бааларга талдоо жүргүзүүнү, жаңы алмалардын мүмкүнчүлүгү жогору болгон рынокторго таратуу каналдарын, кыргыз алмаларын жылдыруу боюнча сунуштарды өзүнө камтыйт.

Түйүндүү сөздөр: интенсивдүү багбанчылык; максаттуу рыноктор; кыргыз алмаларынын орду; ири алма өндүрүүчүлөр; алманын дүйнөлүк баасы.

INTENSIVE GARDENING IN KYRGYZSTAN: MARKETING ASPECT

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Agriculture as the basic industry of the Kyrgyz Republic requires increasing productivity through the use of new technologies to regain competitiveness. The current situation adversely affects the market potential of domestic exporters of cultivated plant products. Technological retard, the lack of large investments in this line of business, the strong position of foreign producers in the international market led to a significant decline in exports of fresh apple from Kyrgyzstan. One of the current trends in this industry is intensive apple gardening. This article conducted a marketing analysis: an STP model, a description of the world's major exporters, and 4P of the market for fresh apples. The paper

contains analysis of the consumer market, target market, analysis of countries - the largest importers of fresh apples as potential markets, positioning of the Kyrgyz apples, a description of the global market for this product, analysis of the largest exporters, recommendations for choosing the most popular sorts of apples, analysis of world prices, distribution channels for fresh apples on potential markets, recommendations for promoting Kyrgyz apples.

Keywords: intensive gardening, segmentation, target markets, positioning of Kyrgyz apples, largest apple producers, world prices for apples.

Gardening can become one of the most profitable business directions in the agriculture of our country, and now it is on the stage of heightened interests on the part of entrepreneurs [1].

In addition to the obvious benefits of this business, we would need to determine that it is aimed at exporting only. First of all, in order not to interfere with the business of small farmers, who offer local varieties of apples, which are popular from Soviet times. And secondly, if we specialize in maintaining intensive gardening and get large volumes of harvest, you need a more capacious consumer market. To determine the route of actions in this business, it is necessary to conduct a marketing analysis of the competitive environment. Let's start with STP model: segmentation, target marketing and positioning of Kyrgyz apples [2].

STP marketing model

Segmentation. Market segmentation by consumers is rather simple. Demographic approach: consumers may be of any age, starting from three months age, irrespective of gender, nationality, level of education and occupied job positions. Geographic: northern and eastern part of Russian, because those markets are less supplied, Kazakhstan. Behaviors: apples are the most popular food products in those countries; they are actively bought within the whole year, irrespective of their season.

Only B2B type (Business to business). Sales are carried out only by wholesales. Private entrepreneurs buy apples by small batches from 10 to 50 tons, as a rule with the purpose to resale to bigger companies. Medium and big customers – are wholesale procurement or food products warehouses, supplying regional local markets, networks of grocery stores, or direct representatives big trading networks. As a rule, contracts are concluded for long periods of time with regular supplies in big volumes from 100 tons to 1000 tons per month.

Target marketing. The Russian Federation and the Republic of Kazakhstan are primary markets for sales of finished productions. According to the assessment made by Expert and analytical Agribusiness Center of Russia “AB-Center” and despite increased volumes of production during recent years the Russian market of apples is characterized by a low level of self-sufficiency, which is according to AB-Center is at the level of 37,1 % (these are average annual rates

for 2012–2017). Respectively, 62,9 % is imported products [3].

A portion of TOP-10 of foreign companies producing apples, whose products are supplied to RF, according to outputs for 2017 was at the rate of 20,8 % of total importing volumes, a portion of TOP-20 is 34,7 %. (See Image 1) [4].

Positioning. In connection with the favoring climatic and weather conditions, the Kyrgyz apples advantageously differ by their tastes: more juicy, crispy, with pleasant slightly sour taste, and glossy shine. Kyrgyzstan was called in the territory of former Soviet Union as “sunny”, because in connection with the biggest number of sunny days per year in comparison with other countries. This association is very useful for positioning of Kyrgyz apples with the purpose to highlight the competitive advantages as “full of the sun's energy”.

Market analysis and competitors

Next step is analyzing competitors – major exporters on world apple market.

The following countries compose the first five world exporters of apples: China (14,6 %), the USA (10,4 %), Italy (10 %), Poland (8,7 %) and Chile (7,4 %). All together these countries export more than a half of all the fresh apples in the world. Main exporters of apples to Russia are the following countries: Moldova (23,4 %), Serbia (17,7 %), China (14,3 %), Belarus (12,5 %) and Argentina (8,3 %). (See Image 2).

Besides, as Polish, French, Italian and USA apples stopped to enter the Russian market, the free niche was quickly occupied by goods supplied from other countries. The activities were displayed by Turkey and Belarus, Serbians started dialogs (negotiations) with the RF (increase of apple import from Serbia made up 31%), and also China and the Ukraine increased their consignments. (See Image 3) [5]

In addition to the product embargo, the imports of apples to Russia were changed because the ruble exchange rate was weakened towards foreign currencies. The deficit established in the market of apples and also the rise in their import costs has led to the growth of prices.

Therefore, a positive trend is that the most favorite situation for development of the apple production in the Kyrgyz Republic is held true.

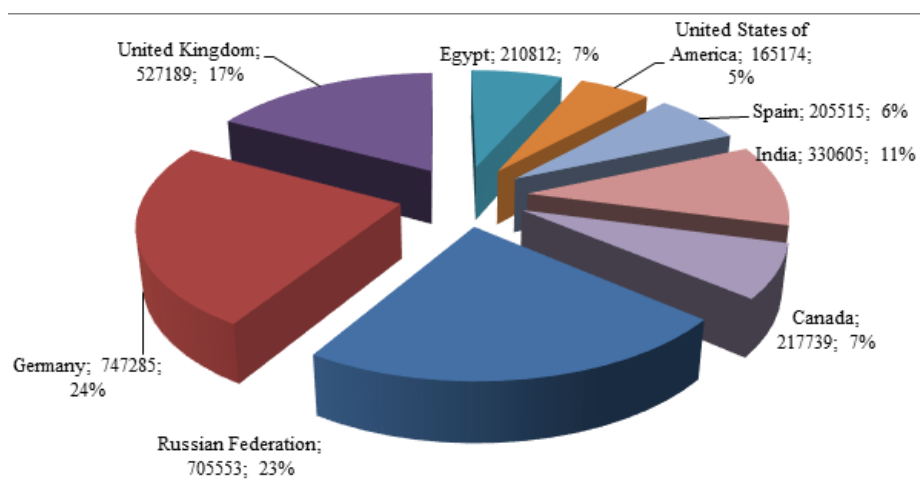


Image 1 – Top-10 the biggest importers of fresh apples in the world, tones (2017)

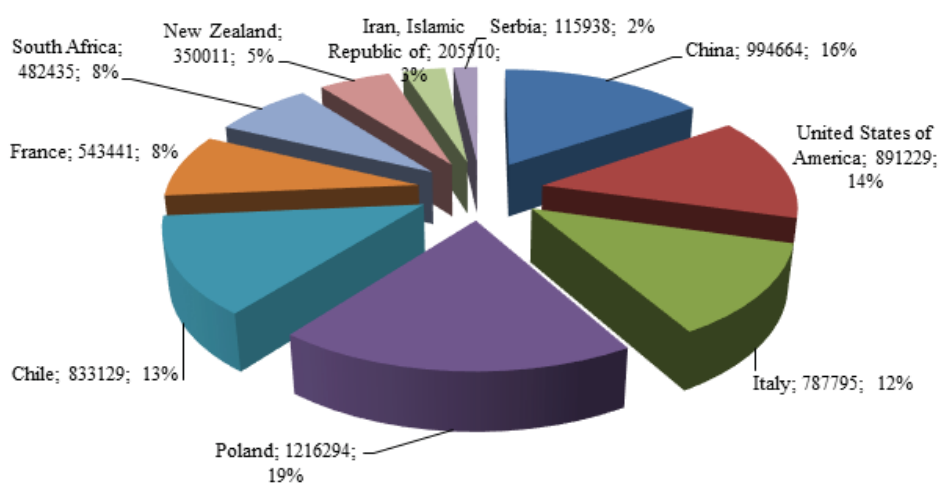


Image 2 – Top-10 the biggest exporters of fresh apples in the world, tones (2017)

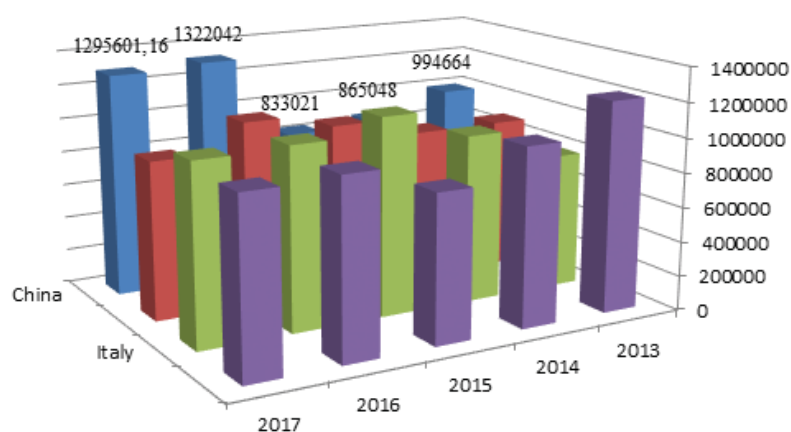


Image 3 – Top-4 the biggest fresh apples exporters for last 2013–2017 years

Table 1 – Prices of producers by countries (USD/tonne)

	2015		2016		2017	
	Value	Flag Description	Value	Flag Description	Value	Flag Description
China	581,90	Official data	468,3	Official data	-	No data available
Kazakhstan	569,20	Official data	366,40	Official data	397,1	Official data
Kyrgyzstan	149,30	FAO estimate	-	No data available	-	No data available
Poland	206,40	Official data	148,60	Official data	274,7	Official data
Russia	513,80	FAO estimate	-	No data available	-	No data available

Source: Food and Agriculture Organization of the United Nation FAO STAT. www.fao.org

4P of marketing

Product. The apple is the most popular fruit among the world consumers. The native land of apples is considered Central Asia, where, even in our days, it is possible to see many plantations of wild apple trees. Apples are the most popular fruit in the whole world. Fresh apple have dietary and therapeutic characteristics, because they contain biological active substances [6].

One of the most important measures when planting industrial orchards is to select modern kinds. First of all, it is reasonable to use for planting the intensive orchard the economically profitable kinds of apple trees with winter maturing, which have keen demand in the market, they are transportable and have good characteristics for long storage. The most popular sorts are the following: Red Delicious (Aidared), Gala, Granny Smith, Fuji, Golden Delicious and Pink Lady. Such statistics is based on observations over apple production for 2013–2017. The highest level of consumption of apples are fixed in China – 58 % of total volume of production in Poland, then follow EU and the USA.

Price. In Europe the price on apples in September 2017 was in the amount of 0,73 EUR for 1 kilo. This is by 30 % higher of an average index for five years. The reasons of increased cost are small volumes of products [7].

Leading exporters of apples in the world are the following:

- China. Here they grow 33 million tons of apples every year, nearly 30 % of them are exported;
- The USA. On account of highly developed selection the country could increase its crop by 4,3 million tons per year;
- Turkey. Due to favor climate for agriculture the country could produce 4,2 million tons per year;
- Russia and the Ukraine. These countries could occupy the 12th and 13th positions, growing annually 1000 and 800 thousand tons of apples [8].

Products of these countries have high quality and average market prices.

Source: Food and Agriculture Organization of the United Nation FAO STAT. www.fao.org

According to Table 1 prices of domestic producers are quite marketable and competitive in comparison with biggest producers of apples, such countries as China and Poland, and also with prices of internal producers in Russia and Kazakhstan.

Place. The B2B type proposes that wholesale of apples on export is performed on the places of their origin (where they were grown).

To gain a good understanding how and how much apples should be sold (realized), it is required to consider where they are sold in the territories of Russia and Kazakhstan:

- Big trading networks. They prefer kinds with long keeping time;
- Big food warehouses (bases). They sell products whole.

In accordance with the aforementioned places of wholesale and retail, the main buyers are wholesale buyers – suppliers to big trade networks, big food warehouses by small batches from 10 to 50 tons are bought by private business men with the purpose to resale also to them.

Promotion. According to several signs a model of fresh apple market is very close to a model of perfect competition. For example, the standardized product apples are of one and the same kind in different countries: they are similar in sizes, colors and smells. Buyers pay attention to a country of origin. Russian and Kazakhstan consumers consider the Kyrgyz apples as more ecological, juicy, taste and good for health, they are useful for small children since their infancy. Therefore, it is not necessary to incur large expenses on promotion and advertising. It is rather enough to create an informative site about characteristics of the Kyrgyz apples, their peculiarities places of growing, technology of producers, their contracts with wholesale buyers.

In *conclusions* it can be claimed that there are no problems with realization (sales), if all the technical standards at growing are observed: correct dozes of herbicides, pesticides and other chemical compounds required for quality increase of the apples' marketable state [9].

Geographic target: northern and eastern part of Russia and Kazakhstan.

Custom market analysis involves Business-to-Business type. Sales are carried out only by wholesales. Initially, the focus is on Private entrepreneurs buy applications by small batteries, and then target buyers are bigger companies, which are suppliers to wholesale markets and supermarket chains. Search for major buyers to conduct through the Internet resources, as well as through direct negotiations.

Use in positioning the Association, which has already developed in the target geographical markets, as fruits filled with the sun.

Large producers are not competitors, since the whole market is not saturated and was lost the major European suppliers in connection with the political situation.

The business is attractive not only in terms of great profitability and long term, but also health benefits, environmental friendliness, there is a history and experience of gardening, free areas with poor soil, but suitable for gardening with proper application of fertilizers and proper irrigation. Costs are minimized, thanks to the partial mechanization of labor, construction of its own irrigation system, rich in water resources. Accordingly, the selling price is highly competitive. Of course, there is a need to correctly calculate the profitability of any business before investing. But, about this we will take a closer look at the next time. [10].

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