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TRENDS, PROBLEMS AND PROSPECTS FOR FISHERY MARKET DEVELOPMENT IN UKRAINE

The article analyzes the market of fish and fish products in Ukraine, identifies the main tendencies of its functioning in view of decreasing the purchasing power of the population, loss of the Crimean peninsula and rising prices of imported fish products. The main reasons for the low rates of development of Ukrainian fish farming are outlined and ways of solving the problem are substantiated. The structure of fish catches in the Azov and Black seas, as well as the structure of the volume of export-import of fish and fish products, is analyzed. It was emphasized that the instability of the Ukrainians' incomes affected the sale of premium-grades, whose imports decreased, while the economy-grades grew. The secondary sales of fish products of national trading networks were analyzed, the main consumer priorities were determined and prospects of development were outlined.

Key words: market of fish products, fish and seafood, aquaculture, products of industrial fish farming, premium-grade, decrease of purchasing power of population, national retail networks, consumer demand.

The market for fish products does not belong to traditional domestic markets, but its functioning and development plays an important role in the structure of the food market in general, since the level of consumption of fish products in Ukraine per person in 2016 was only 9.6 kg, which is 48% from rational consumption norms and 40% from the level of actual consumption of this product in the EU. Fish and fish products have such essential human activities as fatty acids omega-3 and vitamin D, which strengthen the immune defense of the body and improve metabolism.

To the tendencies of the development of the food market in Ukraine in general and the fish products in particular have devoted their scientific works to such outstanding domestic scientists as Borshchevsky P., Dragan O., Zainchkovsky A., Mostenskaya T., Savchenko O., Sologub O., Chernyuk L. However, The unresolved nature of many problems in the development of the market for fish products requires careful study of it in view of the need for a balanced diet of domestic consumers.

The purpose of this article is to study the domestic market of fish and fish products, to identify the main problems and tasks in the light of global trends, as well as to justify the need to take into account their influence in determining the priority development prospects.

The general trends indicate that over the past 20 years, the world's fish and seafood fishery on the high seas has not increased. FAO believes that growing demand is met by aquaculture, that is, catching fish on special farms. Accents are shifting from wild fish to farmer. However, intensive development of local fish farming in Ukraine is not observed, and the crisis situation in the sector is complicated by the loss of the Crimean peninsula, a sharp decline in catches of fish in inland water bodies, as well as a significant rise in prices of imported fish products, which is increasingly becoming inaccessible to the average domestic consumer.

The analysis shows that at the beginning of 2017, the tendency to decrease fishing catch rates continued, although not as active as after the loss of the Crimea. At the same time, the data of the State Fisheries Agency of Ukraine indicate an increase in catch. The reason for such radical opposition is that in its report the State Statistics Service takes into account the catch of the entire Oceanic Fleet of Ukraine, and the State Fisheries Agency of Ukraine receives data only from representatives of Ukrainian reservoirs. According to the profile agency, for the first six months of

2016, fish catches (taking into account only Ukrainian reservoirs) increased by 19.4%, reaching 22.9 thousand tons. At the same time, the increase in the Azov Sea reached 22.1% (14.67 thousand . tons), in the Black Sea – 4.9% (1.33 thousand tons).

According to experts, about 30% of small fish enterprises carry shadow activity, and in general, industrial fishery products make up about 80 million tons. Inland water catches are smaller and amount to about 12 million tons per year.

Oceanic Fleet data indicates a drop in catch. In the first half of 2016, this figure amounted to 7.3 ths. Tons, which is 45% less than the volume for the same period in 2015. On fish farms production, on the contrary, increases-significant growth of 12.5%, up to 3.9 thousand tons.

The low rates of development of Ukrainian fish farming are due to several reasons. The main problem is the high price of land and water leases. When trying to solve the problem, the profile institution proposes to reduce the rental rate to 3%, but the overall amount of the rent is not possible to determine due to lack of awareness of the fishery reservoirs.

On the other hand, there is an increase in the rate of construction of fish farms that grow and produce fish and seafood. Creating such a structure does not require much investment (compared to other farms). Entrepreneurs and investors who are interested in this option come not only from the aquaculture sector, but also from related industries - trade networks, the HoReCa channel. In particular, in order to create a farm for the cultivation of expensive fish, it needs $ 1.5 million. A small carp farm needs investments in the amount of $ 400 million, which are returned in 3 years.

Currently, there are 32 state-owned fish enterprises in Ukraine that breed and catch fish. The most powerful of them are "Chernivtsi Fish Processing Plant", "Vinnitsarybhosp", "Sumiribhosp", "Chernigivshybrybhosp", "Cherkassyrybhosp".

According to the State Budget Agency, about 140 Ukrainian enterprises are currently active in the processing of Ukrainian and imported fish. Canning plants, including the most powerful ones (Ekvator, Odeskyi, Buskyi) can no longer operate at full capacity. Fish processing is reduced due to foreign fish deliveries, as well as an insignificant fish catch in Ukrainian reservoirs. In 2015, aquaculture was 24% in the structure of the Ukrainian fishing industry.

Somewhat better situation in the Sea of Azov is due to the presence of a more powerful raw material foundation – here catch Azov hamsus, tulle, several species of bulls, which make up 90% of the total catch per year in this sea.

Note that the structure of the catch in the Azov and Black Seas has changed quite substantially over the past two years. The prospect of a total catch for the year in the Black and Azov Sea is estimated at 150 thousand tons. And if in 2008–2013 in the Black Sea 38.3 thousand tons of fish were caught, then in 2014 this figure fell to 4.3 thousand tons and already in 2015 hardly exceeded 3 thousand tons.

Before the annexation of the Crimea, 94% of all catches per year fell to the Sprat, the Black Sea and Azov Hams. At present, their share has fallen to 73%.

The most demanded species of fish caught on the territory of Ukraine and enjoy the greatest demand include carp, pike, pelengas, sprat. Mackerel remains the most popular sea fish, the share of which is 15.5% of the total catch, the bull is 13.3%, tulle – 8.4%, krill – 10.1%. Among the river fishes, the leader holds carp (10.6%), carp pastry (13.6%), and crucian carp (5.1%). Not less favorite species of fish in the aspect of consumer priorities are kalkan, herring, bison, pike perch, roach, and seafood is most commonly in demand for shrimp and rapane.

The largest operator who provides and sells fish in Ukraine is Universal Fish Company, as well as Ukrainian Eastern Fish Company, Santa-Ukraine, International Seafood Group, Aquafrost, Clion Group, Iceberg -Fish, Reef.

Despite a slight increase in catches of fish in Ukrainian waters, the country remains dependent on imports, since 90% of the market structure are products that are imported to Ukraine from foreign water resources.

In 2016, imports of fish and seafood declined by 40%. Ukraine imported fish and seafood for $ 290 million, and exported $ 10.9 million. The main category of products procured is ocean fish, since it is impossible to grow and catch it in Ukraine.

Mostly imported products come from Iceland, Norway, the USA, Latvia, Canada and Argentina.

86% of fish imports are frozen fish and its fillets. In such a condition, foreign herring, mackerel, sardine and sprat is being delivered to Ukrainians. Only 7% of fish import is canned and ready fish, as well as "crab sticks". Norway comes from herring and mackerel, from the USA, Argentina, Spain, Canada and Norway – sardines, salmon – from Norway, imported sprat – from the Baltic.

The instability in the income of Ukrainians has affected the sale of premium varieties of fish, in particular, salmon and trout. Their imports declined, while imports of economical varieties of fish (sprat and salmon from Estonia) increased significantly. Premium fish varieties come from France, Italy and China.

Fish exports are practically not developed. In 2016, exports dropped significantly by 80% compared to 2015, due to the unprofitable lease of vessels and the ban on the import of canned fish to Russia. Therefore, the domestic fish market is saturated with products exclusively through imports.

According to the State Agency for Fisheries, during 2016, 5.3 thousand tons of fish, molluscs, crustaceans and other products came to foreign markets for the amount of about $ 15.8 million. The main consumers of seafood and fish caught in Ukrainian reservoirs were Iraq, Germany, Denmark and Belarus.

The export of canned food and processed fish also declined. During 2016, 1960 tons ($ 3.2 million) were sold to Western markets, which is 25% less than in 2015. More than 60% of Ukrainian products from the fish segment were ordered by the CIS countries (Armenia, Turkmenistan, Moldova), as well as Georgia – 20%.

Over the past years, the State Agency for Fisheries has been actively trying to change the legislative "clamps" of the fishing industry. Several positive initiatives were developed, including the permission to lease part of the sea for the development of a fish farm. In 2015, the Concept for the reform of the fisheries sector was developed. The main direction of the document is "effective supervision and control", which involves reducing the staff of state supervisors and improving their productivity. The Office also proposed reducing the number of documents for a permission of up to 70% in order to increase inflow of investment in the industry.

In recent years, sales in the fish segment have fallen by 35–40%, which is due to a rise in prices by about a third. It was because of the fluctuation of the exchange rate and the decline in the solvency of the population that the sale of fishery products decreased by half.

The decrease in the purchasing power of the population due to currency instability primarily affected the imported segment. However, as experts point out, there is a potential in the national fish market, since it is possible to breed not only traditional fish species, but also im-

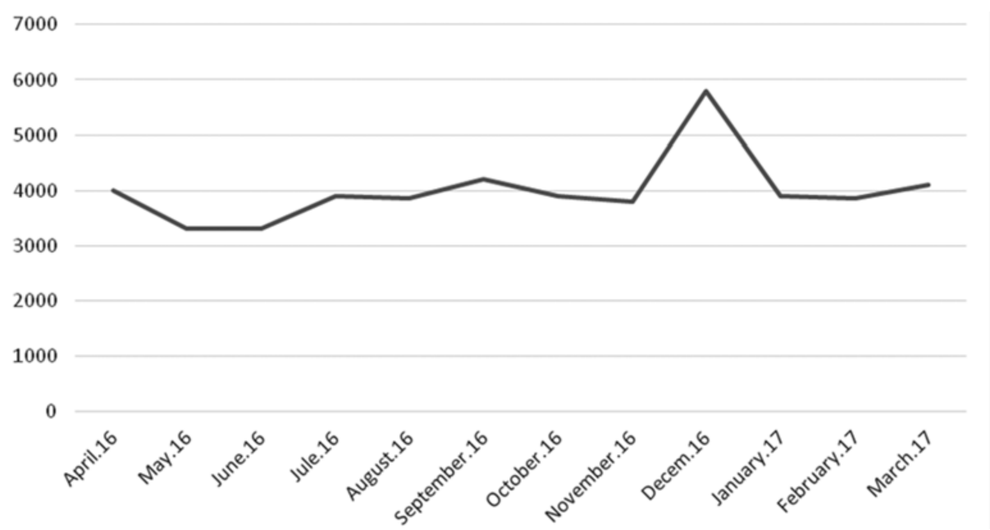

Fig. 1 – Dynamics of sales according to the categories "Fish Gastronomy" in 7 national networks of Ukraine for 2016–2017 years, t

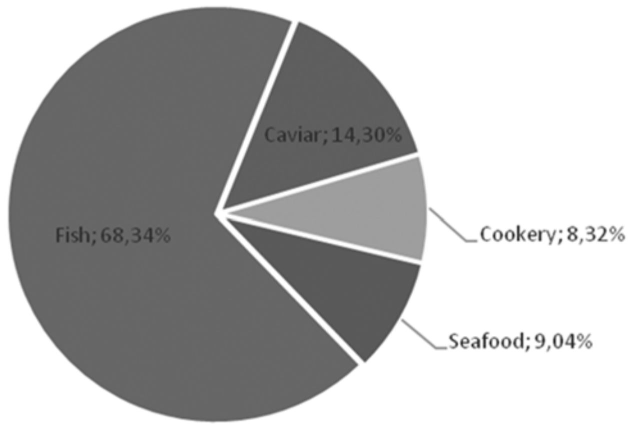

Fig. 2 – Dynamics of sales of fish gastronomy by species (enlarged) during 2016-2017, UAH

ported fish - fish, donats and others - at the present time.

The analysis of secondary sales of products of the product category "Fish Gastronomy" in more than 1400 stores of 7 largest national Ukrainian retail chains (ATB-Market, Silpo, METRO, Tavria-V, Varus, Auchan , "Villa") showed that their total volume for the period April 2016 - March 2017 amounted to more than 49 thousand tons of products. The greatest increase in sales occurs during the New Year holidays.

In terms of money, the total sales of fish products in the analyzed retail network in 2016–2017 amounted to about 5 billion UAH. in the selling prices.

The analysis of the commodity category "Fish Gastronomy" includes the following products: live fish, fresh-frozen, chilled, salted, hot and cold smoked, dried and dried, caviar of all species, all kinds of seafood, crab sticks, semi-finished products, preserves, fish paste, canned fish, etc.

The growth of the market of fish gastronomy in monetary terms is due mainly to inflationary processes and an increase in the selling price of products on the shelf.

The most demanded among buyers of national networks is fish, the share of which is more than 68% of all sales in the category, as well as caviar (14.3%), seafood (9.04%) and fish cooking (8.32%). If we consider in more detail the distribution of sales of fishery gastronomy by product, then from the subcategory "Fish" the most common among consumers of national networks is fresh-frozen fish, the share of which is more than 27% of all sales in the category, as well as cooled fish (10.26%).

The leaders of sales of the commodity category "Fish Gastronomy" are their own brands of the most powerful national networks: "Svoya Liniya" (ATB) with a share of 5.5% of the total sales in monetary terms in the analyzed retail and "Premiya" (Silpo) – 4,3% of sales (analysis was conducted only on branded products). The brands of "Vodnyi svit" (3.6%), Santa Bremor (2.7%), the own brand of the Auchan (2.5%), Norven (2, 5%) and Veladis (2.1%).

The leader in the commodity segment "Fish Gastronomy" in the analyzed trading networks is the UFC manufacturer, whose share is more than 6% of the total sales. The second place in terms of sales in monetary terms is Akvafrost, with a share of 3.67%, and the third – Clion (3.51%).

The largest sales volumes of the Fish Gastronomy category are attributed to the most powerful Ukrainian Silpo trading network, which accounts for over 39%, and ATB-market, which accounts for almost 26% of all sales in the analyzed national retail. The third largest trading network is METRO with a share of almost 16%.

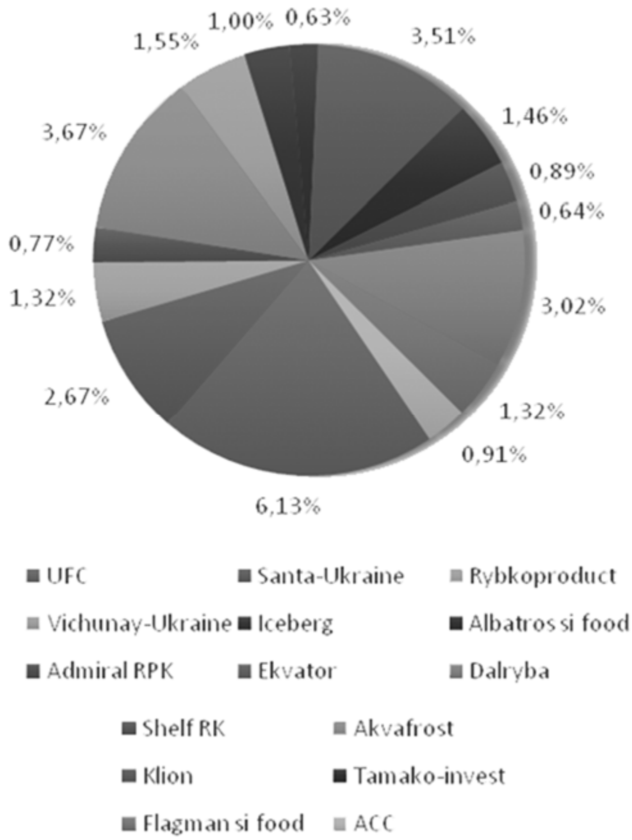

Fig. 3 – TOP-15 producers of fish gastronomy by the share of sales in national retail during 2016–2017, UAH

The economic crisis significantly influenced the consumption of fish and seafood by a domestic consumer, who is forced to save, so he buys fish rarely and in small quantities. That is why cheaper fish species "overtook" sales of premium products. This applies not only to frozen fish, but also canned goods and other fish products.

As 2016 has already passed the transition of consumer demand from high-priced segments to lower, in the coming years, this trend will only increase. The cost of production in Ukrainian trading networks does not allow making positive forecasts, as the price of fish and seafood continues to grow, but not with such speed as during currency devaluation. This will allow consumers to plan their own budget and include a certain amount for fish in it.

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Страшинская Л. Тенденции, проблемы и перспективы развития рынка рыбной продукции в Украине

В статье проанализирован рынок рыбы и рыбной продукции в Украине, определены основные тенденции его функционирования с учетом снижения покупательской способности населения, утраты Крымского полуострова и удорожания импортируемой рыбной продукции. Обозначены основные причины низких темпов развития украинского рыбного фермерства и обоснованы пути решения проблемы. Проанализирована структура вылова рыбы в Азовском и Черном морях, а также структура объемов экспорта-импорта рыбы и рыбной продукции. Акцентировано, что нестабильность в доходах украинцев повлияла на продажи премиум-сортов, импорт которых сократился, а эконом-сортов – вырос. Проанализированы вторичные продажи рыбной продукции национальных торговых сетей, определены основные потребительские приоритеты и обозначены перспективы развития.

Ключевые слова: рынок рыбной продукции, вылов рыбы и морепродуктов, аквакультура, продукция промышленного рыбоводства, премиум-сорта, снижение потребительской способности населения, национальные розничные сети, потребительский спрос.

Страшинська Л. Тенденції, проблеми та перспективи розвитку ринку рибної продукції в Україні

У статті проаналізовано ринок риби та рибної продукції в Україні, визначено основні тенденції його функціонування. Наголошено, що зростаючий попит задовольняється за рахунок аквакультури, акценти зміщуються від дикого вилову риби до фермерського, проте інтенсивного розвитку місцевого рибоводства в Україні не спостерігається. Кризова ситуація в галузі ускладнюється втратою Кримського півострова, різким зниженням обсягів вилову риби у внутрішніх водоймах, а також значним подорожчанням імпортованої рибної продукції, яка все більше стає недоступною пересічному вітчизняному споживачу. Окреслено основні причини низьких темпів розвитку українського рибного фермерства та обґрунтовано шляхи вирішення проблеми. Проаналізовано структуру вилову риби в Азовському та Чорному морях, яка досить істотно змінилася за останні два роки. Дещо краща ситуація в Азовському морі пояснюється наявністю більш потужного сировинного фундаменту. Аналіз обсягів експорту-імпорту риби та рибної продукції показав, що, не дивлячись на деяке збільшення вилову риби в українських водоймах, країна залишається залежною від імпорту. Досліджено структуру експорту-імпорту риби та рибної продукції. Проаналізовано вторинні продажі рибної продукції національних торговельних мереж, визначено основні споживчі пріоритети та окреслено перспективи розвитку. Наголошено, що нестабільність в доходах українців вплинула на продажі преміум-сортів, імпорт яких скоротився, а економ-сортів – зріс. Доведено, *що зростання ринку рибної гастрономії у грошовому виразі обумовлено в основному інфляційними процесами і підвищенням відпускної ціни продукції, а лідерами продажів товарної категорії «Рибна гастрономія» є власні торгові марки найпотужніших національних торговельних мереж. Обґрунтовано перспективи та стратегічні напрями розвитку ринку з огляду на тенденції зміщення пріоритетів у споживчому попиті з високих цінових сегментів до більш низьких.*

Ключові слова: ринок рибної продукції, вилов риби і морепродуктів, аквакультура, продукція промислового рибоводства, преміум-сорти, зниження купівельної спроможності населення, національні роздрібні мережі, споживчий попит.

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ГЛОБАЛЬНА ІНФРАСТРУКТУРА ЯК БАЗИС ІННОВАЦІЙНОГО РОЗВИТКУ НАЦІОНАЛЬНИХ ЕКОНОМІК

Наявні міжвиробничі та міжгалузеві зв'язки в сучасних національних економічних системах вже не задовольняють вимоги наявного глобалізованого суспільства. Розвиток національної інфраструктури є надзвичайно важливим процесом, який проаналізовано з урахуванням світового досвіду та сучасних тенденцій. Розглянуто вплив міжнародних, державних та приватних ініціатив на розбудову інфраструктури та окреслено особливе місце інноваційної інфраструктури, що відіграє ключову роль у підтримці конкурентоздатності національної економіки.

Ключові слова: глобальна інфраструктура, інновації, інноваційна інфраструктура, інвестиційний проект, глобалізація.

На сучасному етапі розвитку світового господарства та міжнародних економічних відносин, який характеризується ескалацією конкуренції, збільшенням чисельності населення у світі, загостренням низки глобальних проблем, асиметричністю та диспропорційністю розвитку, значно актуалізується питання пошуку нових, а також переосмислення старих джерел та факторів забезпечення соціально-економічного зростання, конкурентоспроможності країн. Одним із таких факторів, який сьогодні знову привертає увагу вчених та практиків, потребує переосмислення, подальшого дослідження та розвитку, є інфраструктура.

Одним з важливих аспектів дослідження процесу глобалізації є визначення місця національних господарств у міжнародній економічній системі. Тому, на сьогоднішній день постає питання, як в умовах глобалізації світової економіки формується та функціонує глобальна інфраструктура світового господарства. Запорукою інтенсивного розвитку національної економіки є розуміння процесів, що лежать в