

III. MINTAQA VA TARMOQLAR IQTISODIYOTI

УДК 338.43

QOZOG'ISTON QISHLOQ XO'JALIGINING ASOSIY MUAMMOLARI

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THE MAIN PROBLEMS OF AGRICULTURE IN KAZAKHSTAN

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Abstract. The article presents the results of an assessment of the current situation in the agriculture of Kazakhstan, information on investments that affect the growth of the gross domestic product. The dynamics of exports and imports of agricultural products in 2015-2022 is analyzed as one of the priority areas for ensuring food security in our country. The article outlines the main problems of agriculture. Measures were identified to address the agricultural problems identified in the course of the study. The importance of state regulation of the agrarian sector of Kazakhstan in order to ensure the country's food security is revealed, as well as some measures of state regulation of the development of the agro-industrial complex are shown.

Keywords: agro-industrial complex, agrarian sector, agriculture, state regulation, state support, subsidies, livestock, crop production, agricultural problems, agricultural commodity producers

Annotatsiya. Maqolada Qozog'iston qishloq xo'jaligidagi mavjud vaziyatni baholash natijalari, yalpi mahsulotning o'sishiga ta'sir qiluvchi investitsiyalar haqida ma'lumotlar keltirilgan. Mamlakatimizning oziq-ovqat xavfsizligini ta'minlashning ustuvor yo'nalishlaridan biri sifatida 2015-2022-yillarda qishloq xo'jaligi mahsulotlari eksporti va importini amalga oshirish dinamikasi tahlil qilindi. Maqolada qishloq xo'jaligining asosiy muammolari aniqlangan. O'rganish jarayonida aniqlangan qishloq xo'jaligi muammolarini hal etish bo'yicha chora-tadbirlar ochib berilgan. Mamlakatning oziq-ovqat xavfsizligini ta'minlash uchun Qozog'iston agrar sektorini davlat tomonidan tartibga solishning ahamiyati ochib berilgan va agrosanoat kompleksini rivojlantirishni davlat tomonidan tartibga solishning ayrim choralari ko'rsatib o'tilgan.

Kalit so'zlar: agrosanoat kompleksi, agrar sektor, qishloq xo'jaligi, davlat tomonidan tartibga solish, davlat tomonidan qo'llab-quvvatlash, subsidiyalar, chorvachilik, o'simlikchilik, qishloq xo'jaligi muammolari, qishloq xo'jaligi mahsulotlari ishlab chiqaruvchilari

Аннотация. В статье представлены результаты оценки текущей ситуации в сельском хозяйстве Казахстана, информация об инвестициях, влияющих на рост валового продукта. Проанализирована динамика экспорта и импорта сельскохозяйственной продукции в 2015-2022 гг. как одного из приоритетных направлений обеспечения продовольственной безопасности нашей страны. В статье обозначены основные проблемы сельского хозяйства. Выявлены мероприятия по решению выявленных в ходе исследования сельскохозяйственных проблем. Раскрыто значение государственного регулирования аграрного сектора Казахстана в целях обеспечения продовольственной безопасности страны, а также показаны некоторые меры государственного регулирования развития агропромышленного комплекса.

Ключевые слова: агропромышленный комплекс, аграрный сектор, сельское хозяйство, государственное регулирование, государственная поддержка, субсидирование, животноводство, растениеводство, проблемы сельского хозяйства, производители сельскохозяйственного товара

1. INTRODUCTION

Without highly effective agricultural sector it is impossible to ensure sustainable development of the state, its food security, which is the basis of social well-being of society. The decisive factor in the well-being of the agrarian sector is the presence of effective state regulation mechanisms. State regulation of the agro-industrial complex and rural areas, in order to ensure food security is carried out through: the development of lending in the sphere of agro-industrial complex and rural areas; subsidizing the agro-industrial complex; implementation of mechanisms to stabilize prices of socially important food products; purchase of agricultural products at a guaranteed purchase price; regulation of export and import of agro-industrial goods; technical equipment, and information and marketing support for the agro-industrial complex; establishment of specialized organizations; scientific, regulatory and methodological support and training for the agro-industrial complex; investment in the development of social and engineering infrastructure in rural areas; organization of optimal rural settlement; veterinary, sanitary and phytosanitary safety; financing of expenditure on monitoring and assessment of the reclamation state of irrigated land; application of tax, budget and other measures that can be taken in accordance with the legislative acts of the Republic of Kazakhstan: monitoring, forecasting of technological problems and organization of technology transfer in the agro-industrial complex; attraction of subjects of agro-industrial complex to co-financing in applied scientific research and development work [9].

In all countries of the world the state gives priority to agriculture. High capital intensity of the agricultural sector, long payback period, low profitability, dependence on natural and climatic conditions make it less competitive compared to other sectors of the economy. In this regard, the issues of the need to identify specific agricultural problems and ways to solve them, are relevant.

The research is aimed at studying the current state of the agricultural sector, identifying the main problems of agriculture and determining the priority areas of their solutions.

Analysis of the current situation in agriculture, the attractiveness of the sector for

investment, which affects the growth of gross output, the dynamics of agricultural production as one of the priorities of food security of the country, as well as exports and imports of agricultural products has allowed to reasonably identify the main problems of agriculture at the present stage and identify directions of their solutions, justifying the need to improve issues of state regulation.

2. ANALYSIS OF THE LITERATURE ON THE TOPIC

The analysis of literature in this area shows that the main problems in agriculture, investment, insurance and state regulation of the agricultural sector in recent years are devoted to the domestic works of F.A. Shulenbaeva, A.N. Sakhanova, A.K. Daribaeva, M.J. Kamenova, B.T. Aymurzina and others. Many modern foreign researchers have recently addressed the problems of state regulation of the sphere of agro-industrial complex and their importance in ensuring food security of the country: Y.V. Voronina, L.I. Tenkovskaya, I.P. Chupina, A.G. Mokronosov, A.A. Tenetko, O.I. Malyarenko, G.M. Duzelbaeva and others. The works reveal the main conceptual approaches, methodological and methodological foundations, ways and directions of formation of economic mechanism of management in the agricultural sector of the economy as a whole, taking into account state intervention.

Despite the active development of these issues, to date not all the problems of agricultural production are studied, which determines the need to deepen research on this issue, taking into account current economic conditions.

3. RESEARCH METHODOLOGY

In the course of the study analytical and economic-statistical methods, general scientific methods of system, comparative and structural-analysis were used.

4. ANALYSES AND MAIN RESULTS

Agriculture in Kazakhstan, being one of the priority areas of economic development, has a huge potential and great reserves. Natural conditions, their diversity cause significant potential opportunities for the development of this industry.

The volume of gross agricultural production over the past seven years has increased by

2.3 times and amounted to 7.5 trillion tenge in 2021 (in 2015 - 3.3 trillion tenge), due to investment subsidies allocated in these years to sectors

of agriculture for livestock, crop production and processing of agricultural products (Figure 1) [1].

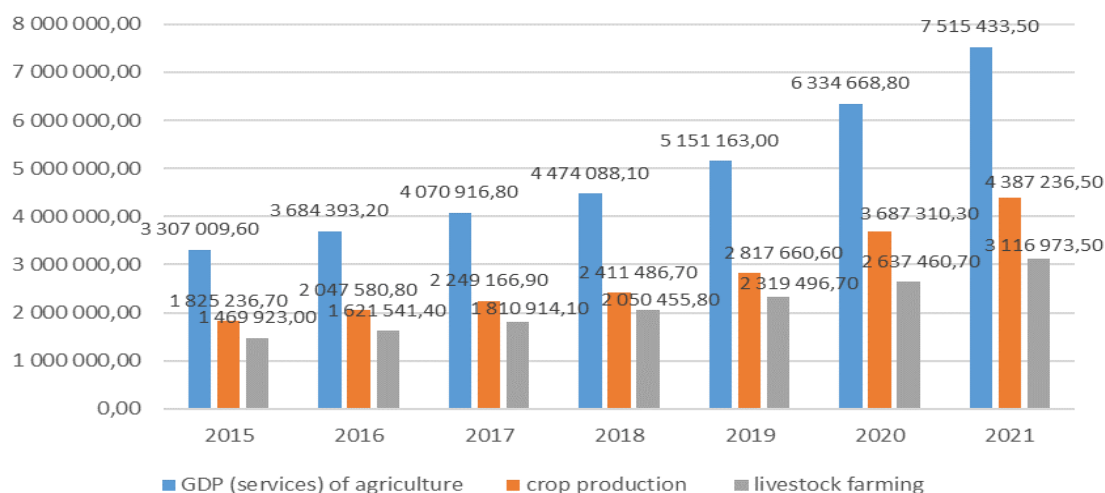


Figure 1 - GDP (services) of agriculture, million tenge*
**Compiled by the authors on the basis of the source [11]*

The industry is becoming attractive for investment. For example, the inflow of investment in fixed capital in agriculture over the past seven years has increased by 5.2 times and amounted to 853.5 billion tenge in 2022. (in 2015 - 163.9 million tenge), and the share of private investment in the total structure is almost 80%.

capital in agriculture, forestry and fisheries the largest investments are in the cultivation of one- or two-year crops (60.2%) and livestock (26.2%). The main grain-growing regions - Akmola, Kostanay and NorthKazakhstan regions directed 357,3 billion tenge to the industry, which amounted to 42% of total investment in agriculture, forestry and fisheries (Figure 2).

In the total volume of investments in fixed

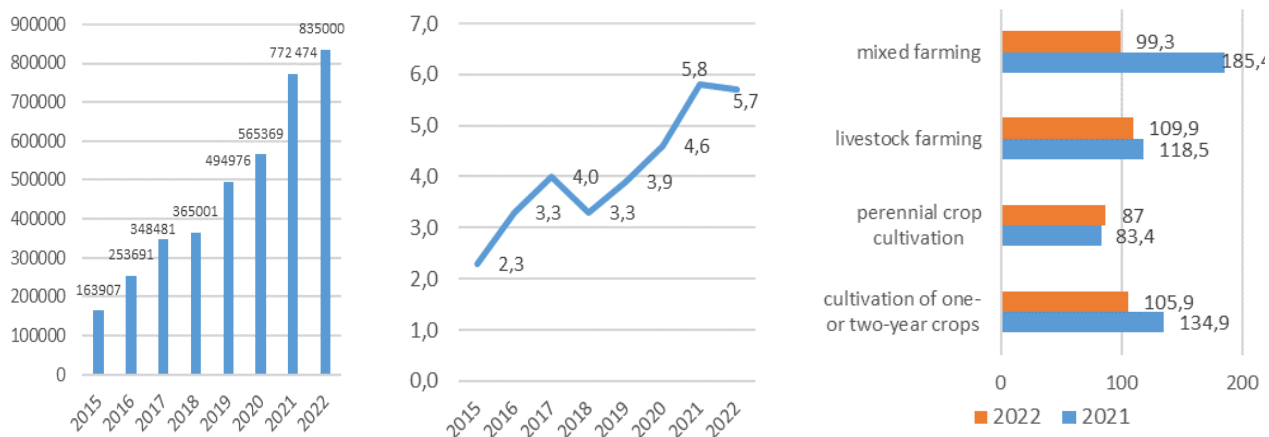


Figure 2 - Investments in agriculture (billion tenge), share (%) for 2015-2022 and investments by direction (% of the previous year)*
**Compiled by the authors on the basis of the source [11]*

Exports of agricultural products and processed products for the seven-year period, shown in Table 1, increased 2.7-fold and

amounted to \$5.6 billion in 2022 (\$2.1 billion in 2015). At the same time, crop production exports increased 2.8-fold to \$3.1 billion in 2022 (2015

- \$1.1 billion). This means that the share of crop exports of agro-industrial products to 54.9% production increased from 52.8% (2015) in total (2022)

Table 1 - Dynamics of exports and imports of agro-industrial complex products for 2015-2022, thousand USD

Products	2015	2016	2017	2018	2019	2020	2021	2022
Total production by the agroindustrial complex								
Export	2087650,8	2123925,5	2429785,0	3091627,2	3289639,5	3380591,8	3819202,0	5584006,0
Import	3245817,0	2927478,1	3349562,4	3510236,0	3798950,2	3927612,1	4748820,9	5848429,3
Processed agricultural products								
Export	945072,1	978157,3	1087154,0	1133507,0	1114967,2	1348724,9	1428413,0	2341248,6
Share of total exports, %	45,3	46,1	44,7	36,7	33,9	39,9	37,4	41,9
Import	978157,3	2055189,5	2383478,3	2424534,8	2602361,0	2752170,6	3286411,9	4073378,9
Share of total imports, %	30,1	70,2	71,2	69,1	68,5	70,1	69,2	69,6
Crop production								
Export	1102715,6	1106794,6	1290264,0	1850005,4	1994459,3	1950023,8	2236820,7	3068177,5
Share of total exports, %	52,8	52,1	53,1	59,8	60,6	57,7	58,6	54,9
Import	882298,4	773595,0	819457,4	896479,7	901495,8	902772,6	1158293,2	1493514,5
Share of total imports, %	27,2	26,4	24,5	25,5	23,7	23,0	24,4	25,5
Livestock products								
Export	39863,1	38973,6	52367,0	108114,8	180213,0	81843,0	153968,3	174580,0
Share in total exports, %	1,9	1,8	2,2	3,5	5,5	2,4	4,0	3,1
Import	128401,7	98693,6	146626,7	189221,5	295093,4	272668,9	304115,8	281535,8
Share in total imports, %	4,0	3,4	4,4	5,4	7,8	6,9	6,4	4,8
<i>Compiled by the authors on the basis of the source [11]</i>								

Exports of livestock products increased significantly (4.4 times) and amounted to \$174.6 million in 2022. The share of livestock products in the total volume of exports of agro-industrial complex. This means that the share of livestock products in total exports of agricultural products increased 1.6 times (in 2022 - 3.1%, in 2015 - 1.9%). Exports of processed agricultural products increased 2.5 times and amounted to \$2.3 billion in 2022. The export of processed agricultural products increased 2.5 times to \$2.3 billion in 2022 (\$0.9 billion in 2015). The share of processed agricultural products in total

agricultural exports increased from 41.9% (2022) to 45.3% (2015).

Analysis of imported goods shows that imports of agricultural products increased 1.8 times over the seven-year period and amounted to USD 5.8 billion in 2022 (USD 3.2 billion in 2015). Imports of crop production increased 1.7-fold, with its share in total imports of agricultural products accounting for 25.5% in 2022 (27.2% in 2015). Imports of livestock products increased 2.2-fold, amounting to \$281.6 million in 2022 (2015 - \$128.4 million). The share of livestock products increased 1.2-fold to 4.8% in 2022 (4% in 2015). Imports of processed agricultural

products increased 4.2-fold and amounted to \$4.1 billion (2015 - \$978.4 million). The share of processed agricultural products in total imports increased from 30.1% (2015) to 69.6% (2022).

The main export commodities of Kazakhstan's agricultural sector are wheat, wheat or wheat and rye flour, barley, flax seeds, sunflower, rapeseed or colza, cattle, sunflower, safflower or cotton oil, pulses vegetables. Kazakhstan imports mainly fruits and nuts, finished cereal products, dairy products and poultry eggs, meat and meat by-products, sugar and confectionery.

The main markets for food products are Uzbekistan, Russia, China, Afghanistan, Iran, Tajikistan, Kyrgyzstan, Turkey, Belgium, Turkmenistan. Imports of food products are from Russia, Uzbekistan, China, Belarus, USA, Poland, Kenya, France and Brazil.

The state of food security according to the criterion of food independence shows that for all major types of food the share of domestic production in domestic consumption is more than 80% [4].

Production of particular livestock products over the seven-year period shows a 1.3-fold increase in milk production (2021 - 6.3 million tons, 2015 - 5.2 million tons), eggs - 1.3 times (2021 - 4.8 billion units, 2015 - 4.7 billion units), meat in live weight - 1.2 times (2021 - 2.2 million tons, 2015 - 1.7 million tons), meat in slaughter weight - 1.1 times (2021 - 1.2 million tons, 2015 - 0.9 million tons). tons, 2015 - 1.7 million tons), meat in slaughter weight - 1 times (2021 - 1.2 million tons, 2015 - 0.9 million tons), wool - 1.1 times (2021 - 41.2 thousand tons, 2015 - 38 thousand tons), with the production of caracas decreased by 0.3 times (2021 - 2.1 thousand pieces, 2015 - 7.1 thousand pieces).

The analysis of the gross harvest of major crops shows for the seven-year period (2015-2022) that the production of cereals (including rice) and pulses in weight after tillage decreased by 0.9 times, oilseeds increased by 1.6 times, of which sunflower seeds in weight after tillage - 1.9 times, potatoes - 1.1 times, vegetables in open and closed ground and melons - 1.3 times, sugar beet in weight after tillage - 1.9 times (Figure 3).

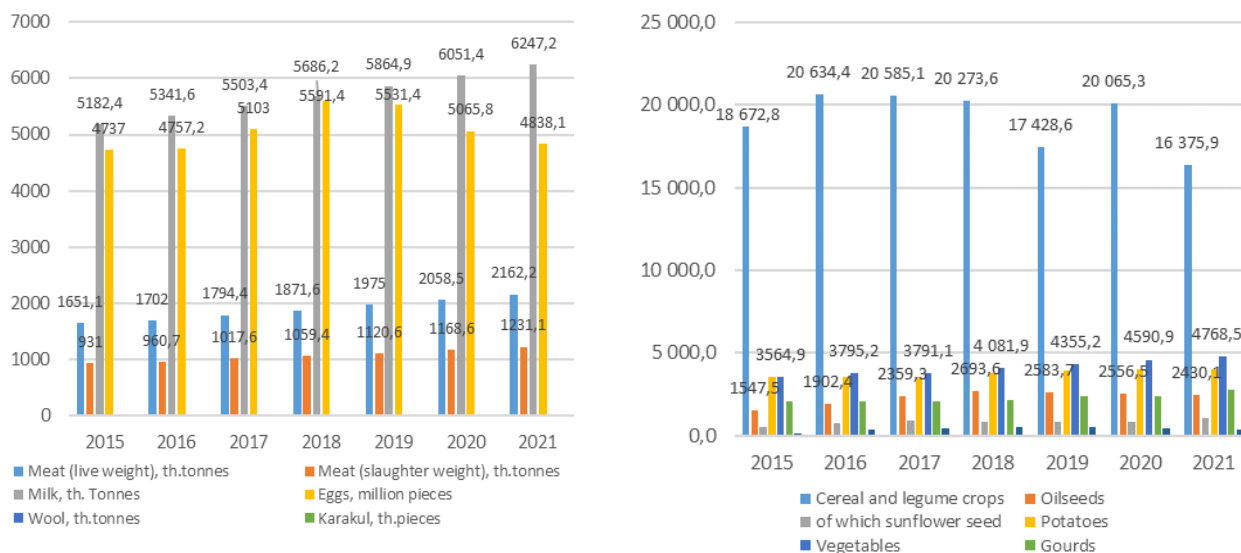


Figure 3 - Dynamics of production of selected agricultural products in the Republic of Kazakhstan for 2015-2021*.

*Compiled by the authors on the basis of the source [11]

The positive dynamics is evidenced by the volume of food production, which over the past seven years has increased 2.1 times and

amounted to 2.3 trillion tenge (in 2015 - 1.1 trillion tenge), as reflected in Figure 4.

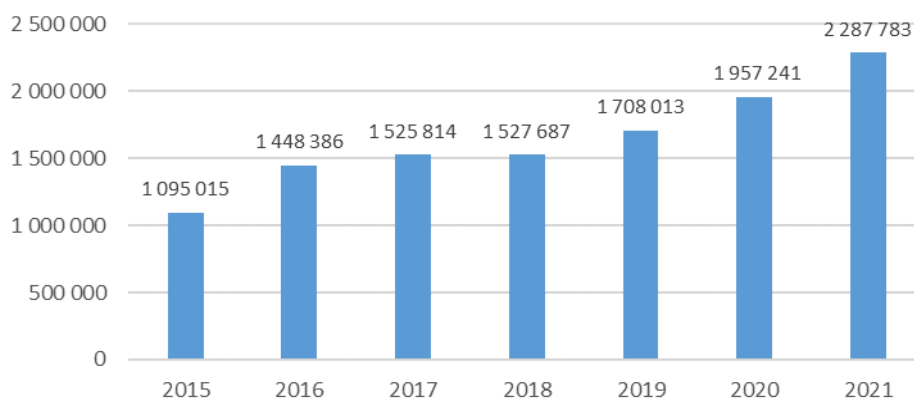


Figure 4 - Volume of food production for 2015-2021, mln. tenge*

*Compiled by the authors on the basis of the source [11]

The agricultural sector, which has positive trends in crop and livestock production, which create conditions for further growth of gross output, is still among the low-profit sectors of Kazakhstan's economy, where many negative trends have not yet been overcome.

The main problem is the imperfection of the system of state regulation of the agricultural sector. A large number of special programs designed for the development of the agro-industrial complex does not have a proper impact on improving the situation in this sector, in particular their implementation is often criticized and their effectiveness. Adopted in the period from 1991 to 2022 more than ten state programs aimed at the development of agro-industrial complex, despite the main cross-cutting goal - increasing the competitiveness of the agroindustrial complex, often changed the priority areas of development, revised the system of state support, the rules of subsidies, the directions of support for exports of domestic agricultural products. At the same time huge budgetary funds were allocated to the agricultural sector, which also did not bring real tangible results. All this underlines the need to improve the issues of state regulation and support of the agro-industrial complex of Kazakhstan [6].

From year to year increasing state aid has not increased the low share of processing of agricultural products. Raw materials, which are the basis of the potential of the agricultural sector, are sold without processing, due to the technological backwardness of processing enterprises

the sold finished products have low competitiveness.

The next problem is the high import dependence in the industry for finished food products and this despite the fact that 80% of manufactured agricultural products are exported as raw materials. This issue can be solved by restricting the export and encouraging the deep processing of raw materials. For example, at the moment there is a ban on the export of buckwheat, white sugar, potatoes, onions, garlic, sunflower seeds and oil. Quotas for carrots, turnips, beets, and cabbage are introduced, as well as for flour and wheat [3].

The technological backwardness of the agricultural sector is underlined by the fact that the growth of production in the agricultural sector is achieved mainly by increasing the number of livestock, sown areas, attracting a large number of workers. At the same time, the increase in agricultural production can also be achieved through effective technologies, increasing yields and productivity, modern equipment and the use of advances in science and technology.

The financial problems of the agroindustrial complex include the shortage and unavailability of credit funds for agricultural producers, the low level of financing in the infrastructure of agricultural production, the disparity of prices for agricultural and industrial products and services, raw materials and food, the lack of funds and sufficient knowledge of the population to organize their own business in rural areas [8].

The low collateral value of agricultural assets and land and the lack of liquid collateral make it difficult for commercial banks to access

credit products. Thus, agriculture accounts for about 2% of loans [5].

It is necessary to note the inefficiency of the current system of subsidies. It does not provide for the achievement of specific predetermined results, obligatory implementation of effective technologies, etc. Recent years are characterized by the instability of types and conditions of subsidies, its final criteria have not been worked out. According to the NPP "Atameken", over the past 5 years, the rules of subsidies have changed 47 times [2]. All this causes discontent of agricultural producers.

On the other hand, agricultural producers have developed a habit of focusing only on budget subsidies. Such subsidies should be allocated to the priority areas of the agro-industrial complex, related to the food security of the country, where state support is indispensable, which in turn will ensure the stability of subsidy rules. There should be defined specific indicators of results, both for the recipients of subsidies, and for the sector of agriculture as a whole, for the achievement of which the heads of the relevant state bodies, and the recipients of subsidies should be directly responsible. At the same time, the basis for further state support should be the achievement of positive trends in the agricultural sector, rather than the rapid absorption of subsidies.

The next problem is that the agricultural sector is small-scale. Most of the products of this sector are produced on household farms. Due to the lack of financial resources, average farmers, private farms and households do not have the opportunity to introduce new technologies in the development of their production, besides, many farms have less than 500 hectares of sown area, so they do not acquire even the supported, let alone new equipment and as a result sell their products to resellers at low prices. The way out can be the association of farmers in agricultural cooperatives, which will allow them to observe crop rotation, buy advanced technology, equipment, fertilizers and seeds in bulk, receive subsidies, establish processing and profitable marketing of products [7]. Despite the advantages of creating agricultural cooperatives, effective results in the process of enlargement of small farms are not observed.

The problems in agriculture are evidenced by the deterioration of the material and technical base, the service life of the fleet of tractors (85%) and combines (68%) have more than 10 years of service. The average wear and tear of the entire fleet of agricultural equipment is about 76%.

Production of organic agricultural products is underdeveloped in Kazakhstan, which is more profitable than traditional agricultural production and provides high returns to the agricultural sector. Despite the fact that the country has the potential to become a supplier of environmentally friendly and safe products in the world, there is still no system of traceability of organic products and prevention of entry into the food market of products with pseudo eco-label, no registry of producers of organic products is developed.

The remoteness of farms from processing plants, from well-established roads, the markup of the selling price exceeding the purchase price by many times, the presence of a huge number of intermediaries between producers and consumers have exposed the existing problem of logistics development in the agricultural industry [8]. The main branches of agriculture also have their own specific problems. Thus, the main problems in animal husbandry are small-scale production, low productivity of farm animals, underdeveloped fodder industry, lack of available land for livestock, lack of qualified personnel, scientific research, lack of stable markets, poor competitiveness [10].

Many problems in crop production are similar to those in livestock production: low material and technical equipment, lack of qualified personnel, lack and unavailability of credit resources, lack of stable markets, poor competitiveness. If we talk about the specific problems of crop production, they are: irrational use of arable land, problems with the availability of resources for fertilizers, insufficient number of granaries, deterioration of phytosanitary situation, problems of water supply and land conditions.

Despite the allocated funds from the national budget for phytosanitary and quarantine measures against especially dangerous and

harmful organisms and quarantine objects, less than 50% of the areas to be treated are treated.

There are many problems in the control and supervisory structures, despite their sufficient number (two committees in the Ministry of Agriculture, two within the Ministry of Ecology, Geology and Natural Resources). Thus, there are unresolved issues in terms of veterinary safety: individual animal diseases, vaccination, identification of animals, illegal movement of livestock, import of possible breeding animals, lack of proper interaction between government agencies controlling this area, low level of diagnostic studies, shortage and training of highly qualified specialists in veterinary medicine, incomplete coverage of animals by veterinary and preventive measures, insufficient level of timely diagnosis and eradication of particularly dangerous animal diseases.

Many shortcomings are observed in the field of phytosanitary security. So, according to experts' estimates, loss of grain yield from pests (flour mite, flour mites, barn weevil, etc.) can be from 25 to 40%. In addition, a significant danger is posed by regulated products coming from China, Uzbekistan, Kyrgyzstan, Iran, Transcaucasian republics, which is detected in the final points of entry of goods, rather than at the border, due to the lack of specialized quarantine laboratories in some checkpoints and insufficient number of qualified inspectors on plant quarantine. In addition, the system of primary seed production does not meet the realities and requirements of modern agricultural business and makes domestic breeding achievements inaccessible for farmers.

To ensure phytosanitary security, it is necessary to bring the material and technical equipment of quarantine laboratories, phytosanitary control posts and state plant quarantine inspectors up to the level of international requirements, and to conduct plant quarantine and protection activities in a timely manner [4].

The existing problems in agriculture are also related to the lack of wide application of insurance activities on compulsory insurance of the agricultural sector despite the law on compulsory insurance in crop production adopted in 2004. The adverse impact of weather conditions, natural disasters, market conditions show the

susceptibility of agriculture to this high risk, unlike other sectors of the economy. In addition, we can observe the disinterest of insurance companies in this type of insurance and their reluctance to take responsibility for the risks of agricultural production that are ubiquitous in Kazakhstan. Thus, eight out of ten insurance companies that previously participated in insurance have voluntarily surrendered their licenses. The solution to this problem was the introduction of amendments to the law, providing the transition from compulsory form of insurance in crop production to voluntary insurance, from subsidizing the payments upon occurrence of an insured event to subsidizing the cost of insurance [12].

The existing problems associated with the lack of information for agricultural producers about the requirements and standards for imported products in the countries, for labeling and packaging of food products, phytosanitary and veterinary and sanitary standards for crop and livestock products, indicate the need to expand the market for Kazakh agricultural products and diversify export potential.

Finally, attention should be drawn to the weak interaction between agribusiness enterprises and universities and colleges, which points to the need for quality training for the agricultural sector. Insufficient motivation of the envisaged measures to support young people to work in rural areas can be solved by increasing the amount of "lifting allowance" for the arrival of young specialists to the countryside, providing a one-time cash incentive for them to work in the field for three years.

In addition, the lack of modern scientific and material-technical infrastructure for scientific organizations, and the low level of competitiveness of domestic scientific products and technologies in the market have led to the need and expansion of international scientific and technical cooperation between the countries. No one country, whatever its scientific and technological potential, can fully satisfy its needs for new equipment and technology, to create all kinds of cutting-edge products and it is the international scientific and technological links that constitute the form through which scientific and technological advances are exchanged between countries.

5. CONCLUSIONS AND SUGGESTIONS

The results of the study of processes occurring in the agricultural sector allow us to formulate the following major problems in this industry: low profitability of sectors of the Kazakh economy, imperfect system of state regulation of the agricultural sector, the presence of financial problems in the agricultural sector, small commodity and wear and tear material and technical base of the agricultural sector, underdeveloped production of organic agricultural products, the problem of logistics development, specific problems in the main branches of agriculture (livestock and crop production), problems related to phytosanitary and quarantine measures, in control and supervisory structures, unresolved

issues in terms of veterinary security, deficiencies in phytosanitary security, problems related to insurance, expansion of the market for Kazakh agricultural products and diversification of export potential, lack of and/or poorly trained personnel for the agricultural sector, lack of modern scientific and material and technical infrastructure for scientific organizations, low competitiveness of domestic scientific products and technologies in the agricultural market.

The analysis of the current situation in agriculture and the key problems in this sector identified in the course of the study have identified areas for their solution, justifying the need to improve the issues of state regulation and support of the agro-industrial complex of Kazakhstan.

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