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A.U. Muhammedov[1], A.B. Tasmaganbetov[2], A.M. Bakirbekova[3]
[1]University of International Business, Almaty, Kazakhstan
[2]K. Zhubanov Aktobe Regional State University, Aktobe, Kazakhstan
[3]L.N.Gumilyov Eurasian National University, Nur-Sultan, Kazakhstan
(E-mail: abum07@mail.ru)

Current state of rice production in the Republic of Kazakhstan

Abstract. The article analyzes the current state of rice production in foreign countries, i.e. a statistical overview of the dynamics of the rice supply indicator over the past five years. Rice production volume indicators are considered: total sown area, gross production, yields per centner per hectare by categories of farms and the share of output for export.

Productivity is analyzed by regions of the republic. The main areas with the highest and lowest indices of rice productivity per hectare were identified. The dynamics of their changes in recent years. The main trading partners, importers of these agricultural products of the republic are identified. Changes in the structure of the republic's rice export to the states of the Eurasian Economic Union, the Commonwealth of Independent States and other countries of the world are described. The main countries were identified, which occupy large shares in terms of purchases in the structure of the country's rice export. The main rice producers in the world are considered. The largest countries consuming rice have been identified. The trade turnover in the global rice market is analyzed.

Measures to improve rice production in consumer countries are considered and proposed.

Key words: rice, export, yield, Commonwealth of Independent States, Eurasian economic Union, acreage, agricultural enterprise, farm.

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Introduction. In rating of food production, rice is only on the third line, despite the fact that consumption is a leader. It should be noted that rice is in the main food category for half of the world's population. And the demand for this cereal will be stably high, since in many Asian countries rice is 85% as a staple food. There is no alternative to rice yet.

The average annual consumption of rice per person in the world is 57,5 kg. In Europe, this agricultural product is consumed at the level of 2-3 kg per person. In Russia, there are 5 kg of rice per year per inhabitant. This is ten times less than in Asia. Thus, a resident of Myanmar eats rice 45.5 times more than the average Russian, Vietnam - almost 43 times, China - 24 times [1].

The main area of use of rice is cooking. However, through industrial processing of rice, in addition to cereals, flour, starch and a drink, rice powder is also used, which is used in cosmetics. Waste after processing rice is used in the preparation of alcohol, beer. Rice bran and straw are fed as livestock feed. Rice straw is used to make tissue paper, cardboard, ropes, ropes, bags, and various wicker work.

There are more than 20 varieties on the market for this cereal, depending on the variety and degree of processing. A characteristic feature of rice is its color. The darker the color, the product is closer to the natural one and the more useful substances are stored in it [2].

Material and research methods. In order to conduct research on the topic of this article, general scientific methods were used, such as comparison, analysis of development indicators, and a systematic approach.

To study foreign experience, general scientific and special research methods were used, such as a review of the legal framework, the analytical method, economic and mathematical

calculations.

Well-known analytical, economic and statistical methods were applied in the context of the provisions of fundamental and applied research in the field of agricultural economics of both Kazakhstan and foreign scientists.

Research results and discussion. In 2018, turnover in the world rice market was estimated at $ 20,2 billion. The main exporters were such countries as: - India (35% or $ 7,05 billion US dollars), - Thailand (15% or $ 3 billion US dollars), - Vietnam (8,7% or $ 1,75 billion US dollars), - (8,2% or $ 1,65 billion US dollars), - Pakistan (8% or $ 1,63 billion US dollars). The largest importers of rice were China (8,5% or $ 1,72 billion US dollars); Saudi Arabia (4,6% ($ 0,933 billion US dollars), Iran (4,4% or $ 0,891 billion US dollars), United Arab Emirates (3,5% or $ 0,706 billion US dollars), the United States (3,4% or $ 0,686 billion US dollars) [3].

The leading rice producers are China, India and Indonesia. Also in the top 10 of rice producers there are Bangladesh, Vietnam, Thailand, Myanmar, the Philippines, Nigeria, Brazil, Pakistan and the United States. In 2017, rice production in China reached 211,1 mln. tons, in India 163,7 mln. tons and Indonesia 79,4 mln. tons [4].

The most rice consuming countries in the world are China, India, Indonesia, Bangladesh, and Vietnam. Over 4 mln. tons of rice are bought by the Chinese every year. The country produces this cereal crop the most in the world, but rice is still not enough, because it is the main food of all segments of the population [5].

In Kazakhstan, rice production is self-sufficient. The security of the domestic market with this type of agricultural product is 192% [6].

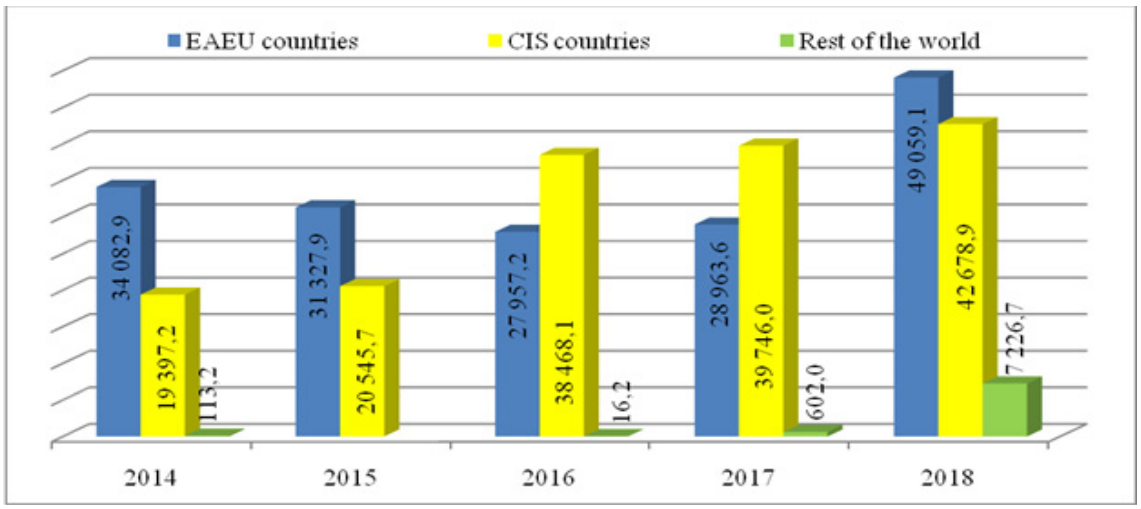
In 2018, rice export from Kazakhstan amounted to 98,9 thousand tons (hereinafter - thou. tons), which is 18,2% (29,6 thou.tons) more than in 2017. Over 2 years, the volume of exports increased by 48,9% (by 32,5 thou.tons), over three years - by 90.5% (by 47 thou.tons).

The value of exports in 2018 amounted to 22,1 mln. US dollars. Over the year, it increased by 56,1% (by 5,6 mln. US dollars), in two years it decreased by 28.9% (by 8,9 mln. US dollars), in three years - by 3,2% (by 0,7 mln. US dollars).

The key direction of rice export from Kazakhstan in 2018 is Russia. It accounts for 48,1% of all supplies of domestic rice (47,6 thou.tons). In second place is Tajikistan – 24,7 thou.tons (25%), the third line is Ukraine – 12,9 thou. tons (13,1%).

According to the results of 2018, the TOP-5 countries-buyers of domestic rice also included Afghanistan – 4576,4 thou.tons (4,6%), Mongolia – 2606,3 thou. tons (2,6%), Turkmenistan – 2563,9 thou.tons (2,6%), Azerbaijan – 2167,5 thou. tons (2,2%) [7].

In the rice export structure, the largest share falls on the EAEU countries. However, their share has declined in recent years. For 5 years, the share of the EAEU countries decreased from 63,6% in 2014 to 49,6% in 2018. In 2015, their share in exports amounted to 60,4%. For 5 years, exports to the CIS countries grew from 36,2% in 2014 to 43,1% in 2018. For 2 years, exports decreased from 57,8% in 2016 and 57,3% in 2017. The share of other countries in rice exports over the past 2 years has grown from 0,9% in 2017 to 7,3% in 2018.



Note. Compiled by the authors [lk. 7]

Figure 1 – Rice exports by countries of the world, thou.tons

However, in value terms, the share of the EAEU countries in the structure of rice exports amounted to 33,3% (or 7,3 mln. US dollars) in 2018, while in 2014 it was 48% (or 9,9 mln. US dollars). In 2015, rice exports to the EAEU countries amounted to 47,8% (or 10,2 mln. US dollars) of total exports, in 2016 it decreased to 28,7% (or 8,9 mln. US dollars). It should be noted that the share of CIS countries in the export of rice in 2014 was 51,8% (or 10,7 mln. US dollars), in 2015 increased to 52,2% (or 11,1 mln. US dollars), in 2016 to 71, 3% (or 22,1 mln. US dollars), in 2017 decreased to 66,8% (or 10,9 mln. US dollars) and in 2018 to 53,7% (or 11,8 mln. US dollars). This decrease is associated with an increase in the share of the rest of the world from 1,1% in 2017 to 13% in 2018.

The growth share of rest countries in the world was ensured by increasing the volume of rice export to Afghanistan from 399 tons in 2017 to 4576,4 tons in 2018, as well as in Mongolia from 195,7 tons to 2606,3 tons for the same period. Among foreign countries, rice is supplied to the USA, China, the United Arab Emirates, Turkey, Germany and Iraq [7].

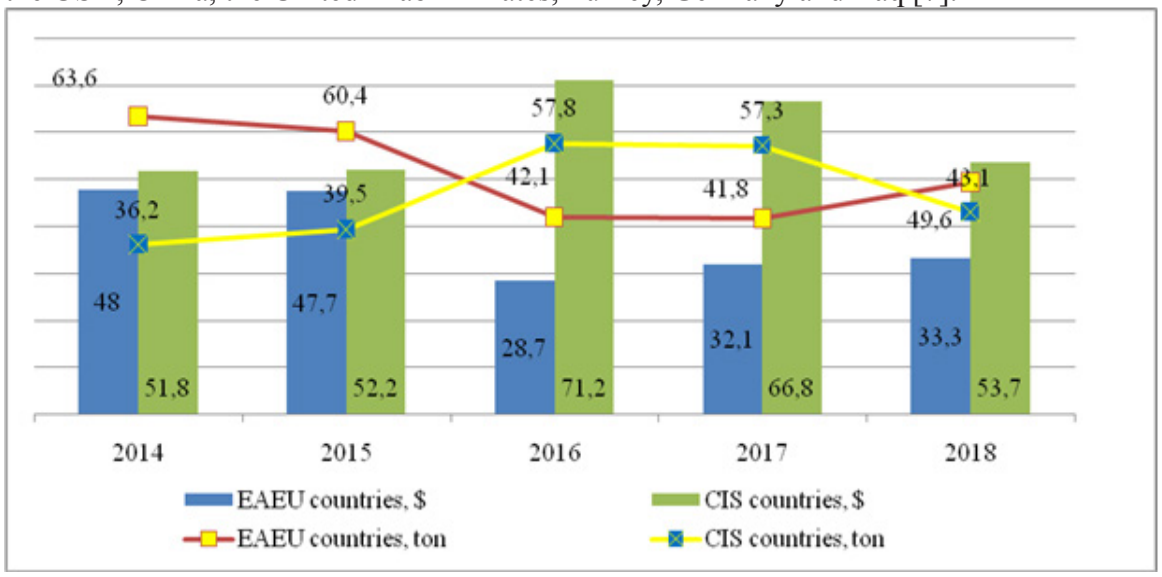


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Figure 2 – The share of EAEU and CIS countries in the total export of rice, %

The rice export share to other countries of the world, along with an increase in the volume of deliveries, increased revenue from sales. So, in 2018, the share in the volume of rice deliveries abroad increased from 0,9% (2017) to 7,3%. Accordingly, the share in revenue increased from 1,1% (2017) to 13%.

It should be noted that with a decrease in the volume of rice supplies for export to the EAEU countries by -8,1% in 2015, the volume of revenue from the supply increased by 2,1%. However, in 2017 the situation looked different. So, with an increase in supply by 3,6%, the volume of revenue from this operation decreased by – 40,8%. A similar situation is observed in rice exports to the CIS countries. An increase in export volume by 3,3% is accompanied by a decrease in revenue by 50,4% over a given period of time. In addition, an increase in rice supplies to the EAEU countries in 2018 by 69,4% contributed to an increase in revenue by only 39,2%. The opposite situation is observed in exports to the CIS countries in 2016. An increase in supply by 87,2% leads to an increase in revenue by 98,6%.

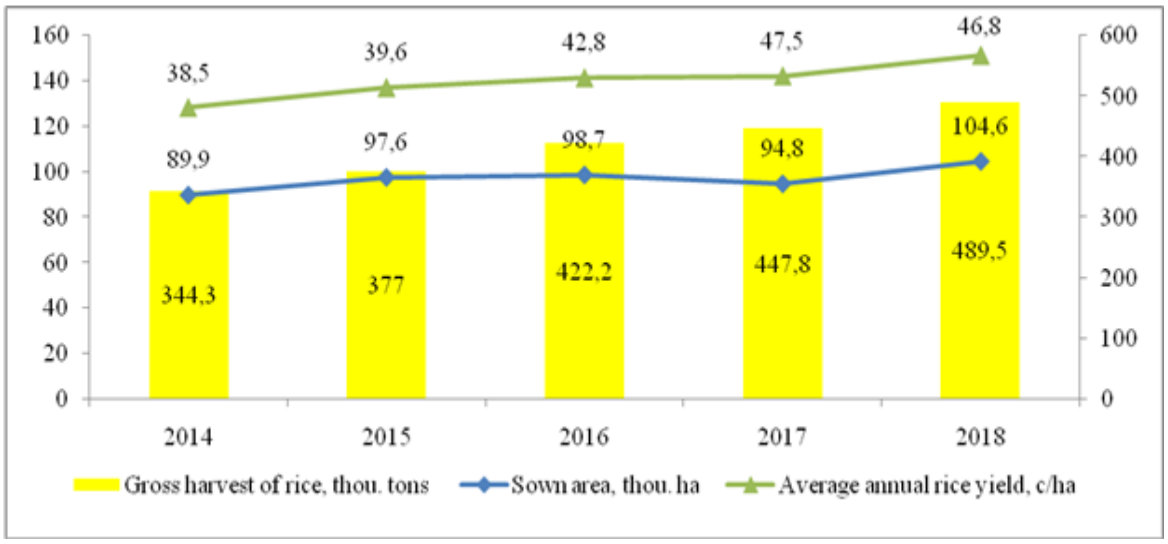

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Figure 3 – Key indicators of rice production in Kazakhstan

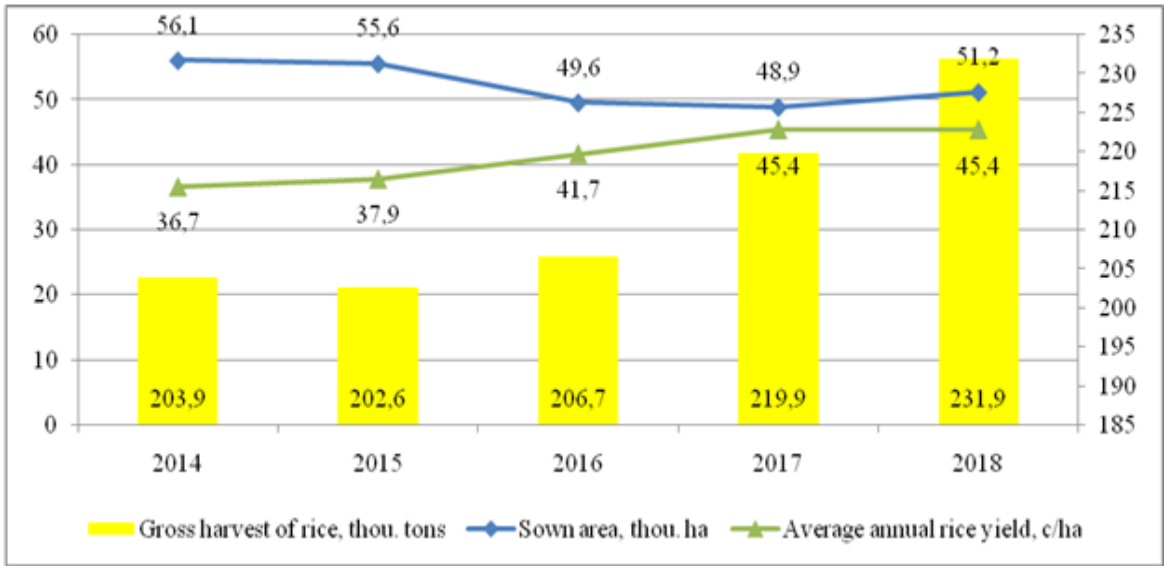
According to the statistics committee, rice cultivated areas in Kazakhstan in 2018 amounted to 104,6 thou.ha in farms of all categories, which is 10,3% (9,8 thou.ha) more than sown in 2017. Over 5 years, there was an increase in indicators by 16,4% (by 14,7 thou.ha) in comparison with 2014, over 10 years, the area increased by 38,2% (by 28,9 thou.ha) compared to 2009. In relation to 2000, the area under crops increased by 34,8 % (by 27 thou.ha) [9, 10].

The cultivation area over the past 5 years has been ensured by increasing the cultivated area of peasants and farms in the country. In 2017, individual entrepreneurs and peasant or farm households sowed 33,8 thou.ha, while in 2018 already 53,5 thou.ha.

However, there has been a decrease in sown area by agricultural enterprises in recent years. In 2014, 56,1 thou.ha were sown by agricultural enterprises, 55,6 thou.ha in 2014, and 51,2 thou. ha in 2018 (Figure 4).

Among the regions, Kyzylorda region is the leader in the harvested rice area. In 2018, 90,8 thou.ha of rice were sown (86,9% in total crops). Over the year, the area increased by 13,1% (by 10,5 thou.ha). Over the past 5 years, the harvested area of rice in the region increased by an average of 5,4%. Whereas, in the Almaty region decreased by -3,3%. On average, over 5 years, the Kyzylorda region accounts for 84,5% of the total cleaned area, Almaty region 12,8%, and South Kazakhstan region 2,7%.

In 2018 production of rice in Kazakhstan was at the level of 489,5 thou.tons. Over the year, fees increased by 9,3% (by 41,7 thou.tons), over 5 years - by 42,2% (by 145,2 thou.tons) compared with 2014, over 10 years - by 92, 2% (by 234,8 thou.tons) compared with 2009, over 17 years (by 2000) - by 228,8% (by 275,5 thou.tons) [9, 10, 11].



Note. Compiled by the authors [lk. 8]

Figure 4 – Rice production by agricultural enterprises of the Republic

An increase of rice harvest took place both in agricultural enterprises and in individual entrepreneurs and peasant or farm enterprises. So, in 2014, agricultural enterprises collected 203,9 thou.tons, in 2017 - 219,9 thou.tons and in 2018 - 231,9 thou.tons. A similar situation is observed in individual entrepreneurs and peasant or farm enterprises. In 2014, this category of producers collected 140,4 thou.tons, then in 2016 - 215,5 thousand tons and in 2018 257,6 thou.tons (Figure 5).

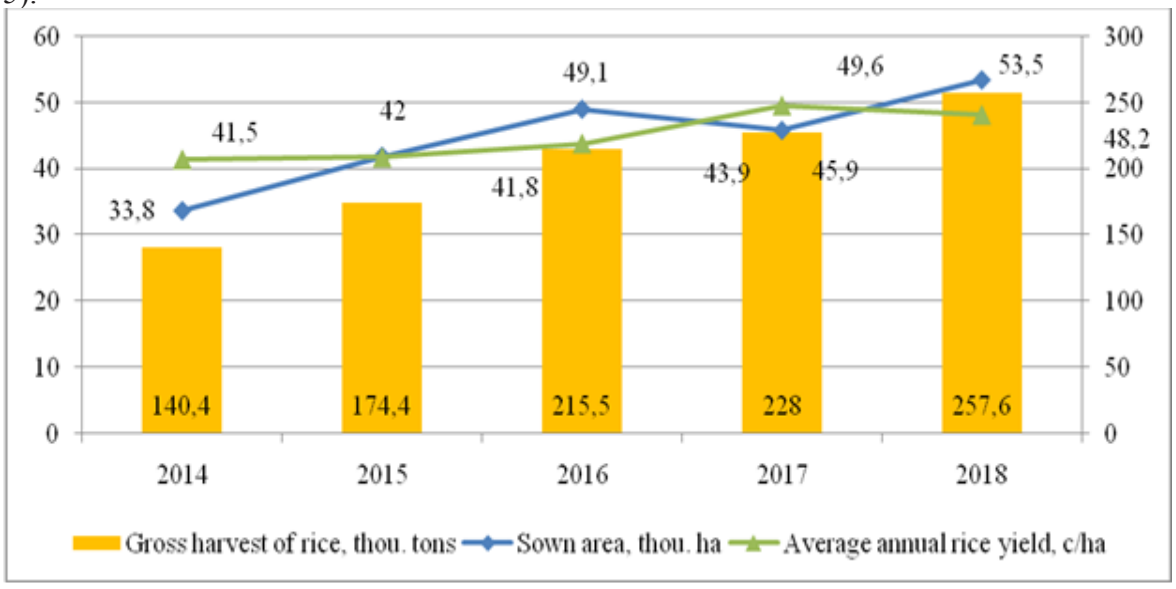


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Figure 5 – Production of rice by peasant or farm enterprises of the Republic

There is a steady increase in gross rice harvest by individual entrepreneurs and peasant or farm enterprises. Over 5 years, the growth of gross rice harvest by individual entrepreneurs and peasant or farm enterprises averaged 16,6%, while for agricultural enterprises this indicator was 3,3%. As a result, the share of agricultural enterprises in the gross rice harvest in the country decreased from 59,2% in 2014 to 47,4% in 2018.

Among the regions in the rice harvest took, the Kyzylorda region is on the leader place. The region's share in the total rice production in the country at the end of 2018 amounted to 89,2% (436,8 thou.tons). In relation to 2017, fees increased by 10.9% (by 43 thou.tons). The area shows a steady increase in collection. So, in 2015, fees increased by 9,7% or 84% of the total republican indicator, in 2016 by 14,9% or 86,2%, respectively. The reduction is observed in the Almaty region. In 2014, the region collected 45,5 thou.tons, which amounted to 13,2% of the total collection in the republic. In 2018, 38,8 thou.tons were collected, or 14.7% less than in 2014. Thus, reducing the share of the region in the republic to 7,9%. However, in 2017, rice harvest growth reached 6,6% and 4% in 2016. In the South Kazakhstan region, rice harvest for 3 years decreased. In 2018, the decrease was -21% compared to the previous year, in 2017 by -24,1%, respectively. However, in 2016, rice harvest growth was 68,1%, and in 2015 36,6%.

Rice productivity in Kazakhstan in 2018 was at record levels, at least since 2000, and reached 46,8 centners per hectare (hereinafter - c/ha). Over the year, it decreased by 1,5% (by 0,7 c/ha), over 5 years, on the contrary, increased by 21,6% (by 8.3 c/ha) compared with 2014, over 10 years it increased by 38,9% (by 13,1 c/ ha) compared with 2009. Compared to 2001, the yield growth amounted to 57,6% (17,1 c/ha) [8, 9, 10].

The analysis of average annual indicators over a long period allows to largely exclude the influence of climatic factors and determine the contribution of the use of advanced technologies to the change in rice productivity in the country.

Rice productivity is the highest not in leading countries, but in such countries as Australia (102 c/ha), Egypt (95 c/ha), USA (86 kc/ ha), Turkey (81 c/ha) [12].

The agricultural productivity of rice in agricultural enterprises in 2014 amounted to 36,7 c/ ha, in 2016 41.7 c/ha, in 2018 reached 45,4 c/ha. The rice productivity of individual entrepreneurs and peasant or farm enterprises in 2014 was at 41,5 c/ha, in 2016 increased to 43,9 c/ha and in 2018 48,2 c/ha.

Rice productivity in the context of some regions is higher than the national average with the exception of the Almaty region. The highest rate of rice yield per hectare in the South Kazakhstan region. Over 5 years, the yield per hectare increased by 8,6% or 5,1 c/ha, reaching 64,7 c/ha. In 2018, yield growth was 12,5%, or 7,2 c/ha compared to 2017. It should be noted that the average annual rice yield in the republic grew until 2017. Over 5 years, rice productivity increased by 5,1%. Whereas in the Kyzylorda region by 5,5%. The lowest growth rate of rice yield is observed in the Almaty region. The average yield is 0,4%. In the South Kazakhstan region, this indicator is at the level of 2,3%. In Kyzylorda oblast, the yield indicator is higher than in the republic. In 2014, the yield was 39 c/ha, in 2016, 43,2 c/ ha, in 2018, 48,1 c/ha.

Over 5 years, the average annual yield was 60,1 c/ha in the South Kazakhstan region, 43,9 c/ha in the Kyzylorda region and 33,1 c/ha in the Almaty region [8, 9].

Conclusion. So, world rice production is growing every year. The rice production volume in recent years has reached half a billion tons. This situation was promoted by the maximum indicators of rice productivity and the expansion of sown areas in the largest producing countries. Along with this, rice consumption in the world is growing. The high demand for this culture from Asia and the countries of Sub-Saharan Africa due to the increase in the population contributes to maintaining this indicator at a stable high level [2]. Based on the foregoing, rice production remains one of the most profitable agricultural crops.

In the republic, the production of this type of agricultural product has a future. The total

sown area of rice has increased. Rice harvesting in the country annually shows steady growth. What contributes to the high average annual rice yield per hectare. Also, domestic rice producers annually increase the supply of this crop abroad. The country's potential in this direction is available. A favorable pricing environment, coupled with an increase in state support, as well as with an increase in the investment attractiveness of the sector (more and more farmers are engaged in rice), contributes to the growth of domestic production. The use of new technologies such as drip irrigation of fields, which is relevant when there is a lack of water, would increase the yield of rice per hectare. In addition, the use of the latest agricultural techniques would in the long term reduce the impact on soil fertility.

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А.У. Мухаммедов[1], А.Б. Тасмаганбетов[2], А.М. Бакирбекова[3]
[1]Халықаралық Бизнес Университеті, Алматы, Қазақстан
[2]Қ.Жұбанов атындағы Ақтөбе өңірлік мемлекеттік университеті, Ақтөбе, Қазақстан
[3]Л.Н.Гумилев атындағы Еуразия ұлттық университеті, Нұр-Сұлтан, Қазақстан

Қазақстан Республикасында күріш өндірісінің қазіргі жағдайы

Аңдатпа. Мақалада шет елдердегі күріш өндірісінің қазіргі жағдайына талдау жүргізілген, яғни, соңғы бес жылдағы күрішпен қамтамасыз ету индикаторының динамикасына статистикалық шолу жасалды. Күріш өндірісі көлемінің келесі индикаторлары: жалпы егіс алқабы, жалпы өнім, шаруашылықтардың санаттары бойынша әр гектардан центнерден өнім алу және экспортқа шығарылатын өнімнің үлесі қарастырылған.

Республиканың аймақтарындағы өнімділік көресткіші талданды. Бір гектарға шаққандағы күріш өнімділігінің ең жоғары және төмен көрсеткіштерін көрсеткен негізгі аудандар анықталды. Сондай-ақ, соңғы жылдардағы олардың өзгеру динамикасы. Негізгі сауда серіктестері, республиканың осы ауылшаруашылық өнімдерін импорттаушылар анықталды. Еуразиялық экономикалық одақ, Тәуелсіз Мемлекеттер Достастығы және әлемнің басқа да елдеріне күріштің республикалық экспорты құрылымындағы өзгерістер сипатталған. Елдің күріш экспорты құрылымында сатып алу бойынша үлкен үлесті алатын негізгі елдер анықталды.

Әлемдегі негізгі күріш өндірушілері қарастырылды. Күрішті тұтынатын ірі елдер анықталды. Әлемдік күріш нарығындағы сауда айналымы талдалды.

Мақалада шет елдердегі күріш өндірісінің қазіргі жағдайына талдау жүргізілген, яғни, соңғы бес жылдағы күрішпен қамтамасыз ету индикаторының динамикасына статистикалық шолу жасалды. Күріш өндірісі көлемінің келесі индикаторлары: жалпы егіс алқабы, жалпы өнім, шаруашылықтардың санаттары бойынша әр гектардың центнерінен өнім алу және экспортқа шығарылатын өнімнің үлесі қарастырылған

Республиканың аймақтарындағы өнімділік көресткіші талданды. Бір гектарға шаққандағы күріш өнімділігінің ең жоғары және төмен көрсеткіштерін көрсеткен негізгі аудандары, аондай-ақ, соңғы жылдардағы олардың өзгеру динамикасы анықталды. Негізгі сауда серіктестері, республиканың осы ауылшаруашылық өнімдерін импорттаушылар анықталды. Еуразиялық экономикалық одақ, Тәуелсіз Мемлекеттер Достастығы және әлемнің басқа да елдеріне күріштің республикалық экспорты құрылымындағы өзгерістер сипатталған. Елдің күріш экспорты құрылымында сатып алу бойынша үлкен үлесті алатын негізгі елдер, әлемдегі негізгі күріш өндірушілері қарастырылды. Күрішті тұтынатын ірі елдер анықталды. Әлемдік күріш нарығындағы сауда айналымы талдалды.

Тұтынушы-елдерге күрішті өндіруді жетілдіру бойынша шаралар ұсынылды.

Түйінді сөздер: күріш, экспорт, өнімділік, Тәуелсіз мемлекеттер достастығы, Еуразиялық экономикалық одақ, егіс алаңы, ауыл шаруашылығы кәсіпорыны, шаруа (фермерлік) қожалығы.

А.У. Мухаммедов[1], А.Б. Тасмаганбетов[2], А.М. Бакирбекова[3]
[1]Университет Международного Бизнеса, Алматы, Казахстан
[2]Актюбинский региональный государственный университет имени К.Жубанова, Актобе, Казахстан
[3]Евразийский национальный университет имени Л.Н.Гумилева, Нур-Султан, Казахстан

Современное состояние производства риса в Республике Казахстан

Аннотация. В статье проведен анализ современного состояния экспорта риса в зарубежные страны, т.е. статистический обзор динамики показателя поставок риса за последние пять лет. Рассмотрены показатели объема производства риса: общая посевная площадь, валовое производство,

урожайность из расчета «центнер на гектар» по категориям хозяйств и доля произведенной продукции, направленная на экспорт.

Проанализирована урожайность в разрезе областей республики. Выявлены области с наивысшими и наименьшими показателями урожайности риса с одного гектара, динамика их изменений за последние годы. Определены основные торговые партнеры и импортеры данной продукции сельского хозяйства нашей республики. Описаны изменения в структуре экспорта риса в государства Евразийского экономического союза, Содружества независимых государств и остальные страны мира. Указаны основные производители риса в мире. Выявлены крупнейшие страны-потребители риса. Проанализирован торговый оборот на мировом рынке риса. Также рассмотрены и предложены мероприятия по совершенствованию производства риса в странах-потребителях.

Ключевые слова: рис, экспорт, урожайность, Содружество независимых государств, Евразийский экономический союз, посевная площадь, сельскохозяйственное предприятие, крестьянское (фермерское) хозяйство.

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Information about authors:

Muhammedov A.U. – d.econ.sci., professor, University of International Business, Almaty, Kazakhstan.

Tasmaganbetov A.B. - c.econ.sci., associate professor, K. Zhubanov Aktobe Regional State University, Aktobe, Kazakhstan.

Bakirbekova A.M. - c.econ.sci., associate professor, L.N.Gumilyov Eurasian National University, Nur Sultan, Kazakhstan.

Мухаммедов А.У. – экономика ғылымдарының докторы, профессор, Халықаралық Бизнес Университеті, Алматы, Қазақстан.

Тасмаганбетов А.Б. - экономика ғылымдарының кандидаты, доцент, Қ.Жұбанов атындағы Ақтөбе өңірлік мемлекеттік университеті, Ақтөбе, Қазақстан.

Бакирбекова А.М. - экономика ғылымдарының кандидаты, доцент, Л.Н.Гумилев атындағы Еуразия ұлттық университеті, Нұр-Сұлтан, Қазақстан.