

THE CURRENT STATE OF DEVELOPMENT OF HORTICULTURE IN UKRAINE

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Introduction. Horticultural production is a considerable part of food balance of Ukraine and natural-economic potential of the country facilitates the formation of high yields of orchard crops. Taking into account these peculiarities Ukraine has the opportunity to satisfy not only its own needs for horticultural production but also to export. However, the efficiency of fruit production in the country considerably decreased. Sharp decline of volumes of production and consumption of orchard crops, considerable decrease of productive areas of perennial plantations, regular decrease of the share of young orchards, lack of necessary financial support by the state led to unprofitableness of fruit production in most farm enterprises. With a low level of fruit production, great difficulties with its marketing arise due to the imperfection of marketing infrastructure, storing and processing of fruits, losing external sales markets. This predetermines the necessity of a complex research of theoretical and practical aspects of increasing the efficiency of orchard crop production.

Analysis of the latest researches. Some aspects of the development and functioning of horticultural branch are elucidated in the research works of such well-known researchers-economists as V. Yurchyshyn [1968], O. Shestopal [2010], O. Yermakov [2001], V. Ruliev [2004] and others. At the same time the issues of increasing the efficiency of fruit production at the regional level need further research.

Brief summary of the research. Horticulture – is a traditional branch of agriculture in Ukraine which has a rich many-century history. The significance of the branch lies in the fact that it produces exceptionally valuable food products which also have useful therapeutic qualities. Fruits and berries are important not only as essential food products but have high healing qualities. A kilogram of fruit and berries contains in the average 440 kcal. Due to its content of easily digested carbohydrates, organic acids and vitamins the quality of human nutrition improves considerably with the optimal consumption of fruit and berries and products.

Potentially, fruit and berry production of Ukraine is able to provide domestic needs and to produce horticultural products for export. However the modern state of fruit and berry production in Ukraine is rather low comparing with the countries with highly developed fruit production despite the fact that the country has favorable conditions for its development. Even in the years of the highest gross yield of horticultural production per capita comprised about 80 kg, while in the USA it was 100 kg, in Austria – 134 and in Holland it was 149 kg. In recent years fruit and berry production reduced even more and in 2011 it was 41kg per capita which is on 27% less than in 1990, though according to the information of the Institute of Food the optimal rate of consumption of fruit and berries in Ukraine is supposed to be 92 kg

per capita. Such a low rate of consumption of fruit and berries can be explained by both the decrease of production and sharp decline of solvent demand for them.

The comparison of the dynamics of pomes crops (apples, pears) production in Ukraine and other countries of the world is too expressive. Their share is about 75% of all horticultural gross yield in the world. From 1990-1991 to 2000-2001 fruit production in foreign countries increased by 62% and in Ukraine it decreased by 56%.

On the basis of generalization of the published works by Ukrainian researchers, such peculiarities of fruit and berry plantations as the main element of means of production in horticultural sector were established and concretized:

- fruit and berry plantations on the contrary to other means of production are produced directly at agricultural enterprises, they have clearly determined single production orientation and do not pass the marketing stage. This promotes the creation of such plantations which would correspond to natural-economic conditions of a particular farm;
- fruits and berries crops, their varieties differ considerably not only by their consumption characteristics but by a complex of organizational, economic and technological factors which influence the economic efficiency of production. Different terms of supply of the commodities for their sale, different periods of most labor intensive work connected with care for plantations and peculiarities of storing fruit and berries can be mentioned among such factors. Due to these facts it is obvious that the crucial role in rational commodity production is played by substantiation of variety composition of the plantations;
- sustainability of fruit and berry production can be reached only under the conditions of systematic reproduction in accordance with standard periods, their creation and efficient use;
- fruit and berries crops and their cultivars differ considerably by both the length of creation of plantations and periods of their productive use. Optimization of the age structure of plantations, namely keeping the normative specific weight of young plantations to their total area is of great importance;
- high capital and fund intensity of fruit production. There is a great gap in time between investing money into the creation of plantations and receiving effect which is caused by the nature of varieties and cultivars;
- most fruits varieties deteriorate fast and are difficult to transport, so they should be sold out quickly or should be processed and canned quickly. This requires comprehensive integration of production spheres, industrial processing, storing and selling fruits and berries which is an objective prerequisite for the efficient organization and functioning of the branch;
- the conjuncture of the horticultural production market changes constantly. That is why the technology of production should be flexible which can be realized through reduction of the duration of general rotation of plantations and acceleration of the variety renewal of plantations;
- the production of horticultural commodities is risky due to unfavorable weather conditions. Due to this fact, monoculture in every horticultural farm is more an exception than a rule. This also explains the importance of plantations insurance

and creation of financial reserves on the farms;

- Due to the nature of fruit and berries crops belongs to highly intensive branches of agricultural production. The creation of new and improvement of existing means of production namely, development of new varieties of fruit and berries, and their selection on the basis of varieties studying, introduction, creation of more efficient types of plantations, selection of variety-rootstock combinations etc., which will ensure high production results are dominant ways of intensification of horticulture [Shestopalov 2010].

The present state of horticulture in Ukraine is characterized by a very low level of productivity of plantations especially at the agricultural enterprises. During the years of reforming of the agrarian sector, industrial horticulture became unprofitable at most agricultural enterprises and gradually disappear as a branch of agriculture. The area of fruit plantations during the period of 1990-2011 decreased nearly by 3 times (tab.1).

1. Dynamics of fruit and berries production in Ukraine according to categories of farms

Year	All categories of farms	Including					
		agricultural enterprises		individual farms		farms	
		total	% of total amount	total	% of total amount	total	% of total amount
Area of fructiferous plantations, th.ha.							
1991	669,20	325,80	48,68	343,30	51,30	0,00	0,00
2000	378,00	240,10	63,52	134,50	35,58	3,40	0,90
2005	265,50	124,80	47,01	140,60	52,96	6,20	2,34
2010	223,20	75,10	33,65	148,10	66,35	7,40	3,32
2011	223,40	73,10	32,72	150,30	67,28	7,90	3,54
Yield, hundredweight from 1 ha.							
1991	22,90	13,50	58,95	32,00	139,31	4,40	19,16
2000	38,40	10,90	28,39	88,30	229,71	11,50	29,92
2005	63,70	16,00	25,12	105,90	166,25	17,30	27,16
2010	78,20	38,20	48,85	98,50	125,96	49,70	63,55
2011	84,90	41,00	48,29	106,20	125,09	48,50	57,13
Croppage, th., hundredweight							
1991	15371,50	4398,30	28,61	10985,60	71,47	0,00	0,00
2000	14530,30	2617,10	18,01	11876,40	81,73	39,10	0,27
2005	16899,00	2001,00	11,84	14898,10	88,16	108,30	0,64
2010	17464,50	2867,90	16,42	14596,60	83,58	370,10	2,12
2011	18963,30	2998,00	15,81	15965,30	84,19	385,40	2,03

In Ukraine the main fruit and berry producers were individual country farms – 84,1% without taking into account the fact that they occupied only 67,28% of all the area of productive plantations. The share of horticultural farms is only 2,03% of the produced products. It is necessary to underline the tendency to increase of role of individual horticultural farms during the years of the research. The lowest results in fruit and berries production were shown by agricultural enterprises. In horticultural farms of Ukraine, the yield level of fruiting crops are gradually increasing, which is connected firstly with the application of new technologies in fruit and berries production, and higher level of intensification.

In spite of the development of individual country farms and farming, the specialized horticultural agroindustrial enterprises which will have optimal area of fruit productive plantations, their own base of storing products and processing.

Besides changes in the structure of horticultural production by categories of farms, it is necessary to mention the changes in the species structure of production during the period of research (table 2). If in 1990 horticultural production was mainly represented by pome crops which occupied 75,5% of the total supply of fruit at the market, in 2010 their supply reduced to 62,3%. However, apple production still has the highest amount of production.

2. Species structure of horticultural production in Ukraine (%)

Production	1990	1995	2000	2005	2010
Fruit and berries – total	100	100	100	100	100
pome fruits	75,5	68,4	56,0	53,6	62,3
apples	66,5	55,1	44,6	42,6	52,7
pears	8,6	13,0	10,7	10,5	9,0
quince	0,4	0,2	0,5	0,5	0,5
Stone fruits	20,0	25,2	34,9	34,5	25,3
plums	8,5	8,0	8,5	9,8	8,4
sour cherries	5,6	8,1	10,7	10,8	7,2
sweet cherries	1,5	2,5	5,2	5,9	3,3
apricots	2,2	5,1	7,0	5,6	4,6
peaches	2,1	1,3	2,4	1,9	1,2
nuts	1,5	4,0	3,4	5,4	5,3
walnuts	1,4	4,0	3,4	5,4	5,2
berries	3,1	2,4	5,7	6,5	7,1
strawberries	1,7	0,9	2,2	2,7	3,6
raspberries	0,3	0,4	1,4	1,7	1,5
black currant	0,7	0,8	1,4	1,5	1,4
gooseberries	0,3	0,2	0,6	0,5	0,4

During the research years the share of stone fruits increased from 20 to 25,2%, nuts – from 1,5 to 5,3% and berries from 3,1 to 7,1%. Speaking about stone fruits, in 2010 the share of sour cherries, sweet cherries and apricots supply increased considerably by 1,6, 1,8, and 2,4 respectively. Considering berries, the production of all kinds also increased.

The supply of horticultural production is formed by agricultural enterprises and farms of the population of all regions of Ukraine. However, in 2010 the biggest share of fruit and berries was made in Vinnytsya (13,2%), Khmelnytsky (10,8%), Poltava (7,2%), Dnipropetrovsk (6,7%), Donetsk (6,0%), Zakarpattia (5,8%), Lviv (5,6%) and Chernivtsi (5,4%) regions.

It is also necessary to mention the exceptionally important role of such factor as the reduction of areas under productive plantations which also negatively influences fruit and berries production in Ukraine. This decrease occurs gradually with the removal of old plantations and in 2011 the areas under perennial productive plantations were 223,4 thousand hectares which is in 2,1 times less than in 1986-1990. The biggest reduction of the areas was observed in 1997-1998.

The increase of fruit tree plantations areas occurred till 1981. It was achieved by a rapid pace of their creation in the specialized horticultural farms of Ukraine. In separate years the orchards of 40-50 thousand hectares were formed. Such approach to the development of the horticultural branch did not meet the requirements of that time and was eliminated by practice. All the following years were characterized by a stable reduction of planting areas, especially in the farms of public sector. Thus, in 2011 compared to 1991 the area of fruit plantings reduced by 6,62%.

A very low pace of renewal of orchards can also be mentioned as one of the negative factors which influence the development of fruit production. It is a known fact that a systematic renewal of fruit plantations is one of the most important factors of intensification of fruit production, the latest achievements of scientific and technical progress are introduced, the assortment is enriched, new resistant varieties are developed. The problem of renewal and creation of new orchards and berry fields is one of the most urgent in Ukrainian fruit production nowadays. The areas of old plantations which should be removed are much bigger than the areas of new orchards.

All these factors lead to aging of plantations. According to the data of the latest census of orchards in the farms of Ukraine 85001,2 ha or 31,4% of the total area of productive fruit plantations were used during much longer terms than they were supposed to.

In addition to production, the import of fruits from other countries is a part of fruit and berry supply on the Ukrainian market (fig.1). According to the balance of fruits, berries and grapes (including canned and dried commodities in recalculation to fresh produce), the increase of import of horticultural produce by 178,43 thousand tons is observed in Ukraine annually.

According to the research of the Analytical-consulting center of the Blue Ribbon the main reasons for increasing the import of fruits and berries are:

- 1) tendencies to the long-term increase of fresh fruit consumption which is proved by the last 10 years: more requirements to the quality and assortment of the produce; changes in the consumer's preferences which is based on the desire for a healthy way of life; better availability of fruits which are not grown in Ukraine due to

its natural and climate conditions; factors which are the result of reducing the import duty rates after Ukraine's joining the WTO.

2) Active development of big trade chains (METRO, Auchan, Billa, Fozzy Group and others): interest in wholesale supply of high quality and certified produce; demand for the external appearance of commodities and packing; need for the diversity of commodities; seasonal factor of growing fruits in Ukraine; cultivation of the traditional for Ukraine varieties; low demand for storage facilities; reduction of import duty rates which is the result of Ukraine's joining the WTO [Zhyhadlo 2010].

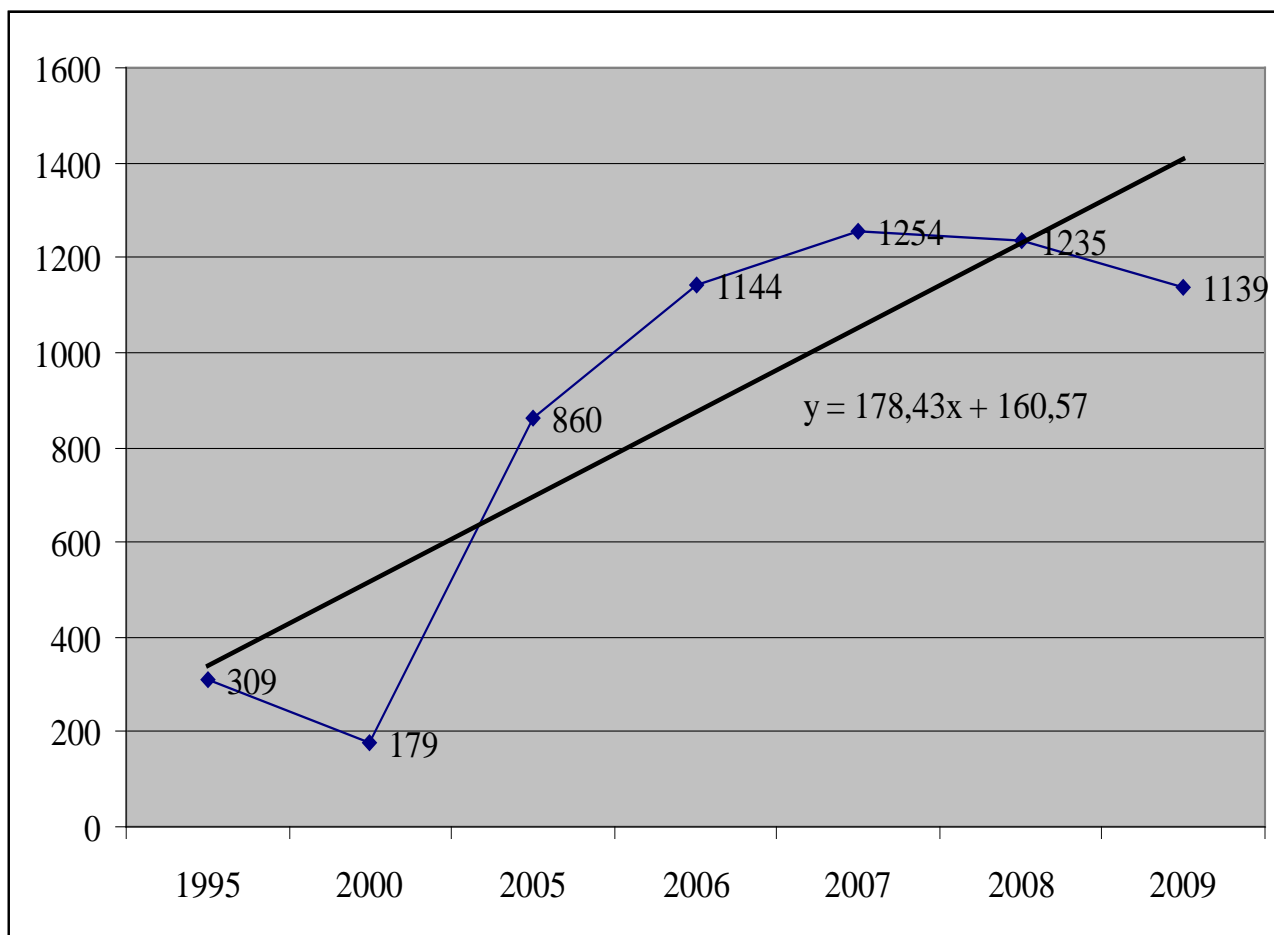


Fig.1. Dynamics of import of horticultural produce of Ukraine, thousand tons

In 2009 the share of import in the structure of fruit and berry supply was 36,8% while in 1995 it was only 12%. The most popular imported commodities traditionally are citrus fruits – 37% and bananas – 21%, i.e. fruits which are not cultivated in Ukraine due to its nature and climate conditions and can not be substituted by national products by their flavor and taste qualities, at the same time they have reasonable consumer prices. Ukraine's joining the WTO has also played its role in availability of the fruits as the import customs tariff for citrus fruits and bananas before this was 3% and after joining the WTO it became 0%. The import of apples increased by 56%, 93% of which was provided by supplies from Poland: by price indices, Polish apples are at the same level with the Ukrainian apples and in winter-spring period they are even less expensive, thus, in 2009 the average price of imported apples from Poland comprised 2,9-3,0 hrn/kg.

The main countries-importers of horticultural produce to Ukraine are Turkey, Poland, Egypt, Spain, Ecuador, Georgia etc.

Under the conditions of market economy the main goal of commercial fruit production is making a profit by selling it at the market. It can be reached through the intensification, the main point of which lies in the optimal correlation of “expenses – output” or “effect – expenses”. New technological elements, plantation types, cultivars could be good methods of increasing the efficiency of production only if it ensures reduction of the cost price of the produce and increase of its quality.

In 2011 the level of profitability became 17,9% which proves the revival of the branch (tab. 3).

3. Economic efficiency of fruit and berries production in Ukraine in 2011

Index	Agro-climatic zone			
	Polissia	Carpathians	Forest-Steppe	Steppe
Area of productive plantations, th.ha.	19,4	47,1	83	60,6
Croppage, th.hundredweight	1745,5	3508	6973,9	5738,8
Yield from 1 ha., hdrw	334,2	288,9	670,1	636,7
Amount of the produce sold, th.tons	0,9	10,7	136,2	55,1
Total cost price of the produce sold, th.hrn.*	1456,6	34443,5	224011,4	180367,4
Net income (receipts), th.hrn.*	1604,8	26515,5	273275,3	213031,4
Profit (loss), th.hrn.*	148,2	-7928	49263,9	32664
Total cost price of 1 hdwt. of fruits, hrn. *	161,84	321,90	164,47	327,35
Selling price of 1 hdwt. of fruits, hrn. *	178,31	247,81	200,64	386,63
Profit (loss) per 1 ha, hrn. *	16,47	-74,09	36,17	59,28
Level of profitability (unprofitableness), %	10,17	-23,02	21,99	18,11

The National Program of the Development of Fruit Production, which was approved by the Decree №220 of the Cabinet of Ministers of Ukraine dated 4th April, 1994, plays a very important role in the development of fruit production. In accordance with it, the amounts of gross production were calculated with the help of scientifically grounded norms of consumption of fresh produce and needs of the processing industry for raw materials [The program..]

The increase of fruit production will be reached through improving the profitability of plantations on the basis of further intensification of the branch, namely, creation of the plantations of new type, extension of areas under grapes especially of industrial varieties, development and introduction of highly productive varieties of high quality with higher resistance to frosts, diseases and pests.

To achieve the desired volumes of production it is necessary to ensure the development and strengthening of plants producing basis. In the process of reforming the branch and privatization of nursery farms this sphere lost its organization, unity and guaranteed selling of the grown young trees. The lack of the state support in the creation of new plantations influenced negatively on the development of nursery industry during a long period of time. Reduction of production of planting stock of fruit crops during the last decade in twice and soft fruits by 3,5 times resulted in its partial import, inter-regional exchanges, lower requirements for the quality and purity of varieties, infestation with pests and diseases. The main directions of work in nursery industry are supplying the consumers with planting stock of high quality, improving its variety and variety stock structure, growing of improved healthy young plants including early ripened varieties.

The important factors of intensification of horticulture and viticulture are the improvement of the system of protection of plantations from pests and diseases where a significant role is played by integrated method that is highly precise in forecasting of pests appearing with further application of microbiological preparations, less toxic and able to quick decompose in the environment insecticides.

It is also supposed to extend the areas of irrigation of perennial plantations with the help of modern irrigation systems, introduction of progressive methods of irrigation, namely, drip irrigation, under top and overhead irrigation.

To restore commercial fruit production, the intensive types of orchards, which together with high profitability will ensure rapid capital turnover and considerably shorter investment period, should be more widely used.

It is also necessary to take into consideration natural investment characteristics of a number of fruit and berry crops and pomological varieties which facilitates fast transformation of investments into acting main means of production and high returns of investments.

The extension of holding capacities of domestic market and the use of the branch's export potential play an important role in the increase of the efficiency of commercial fruit production. According to calculations of Ukrainian researchers the annual amount of the Ukrainian export of fruits and berries can be 250-300 th.tons, that is why it is important to develop a mechanism of the state protectionism and to protect the national producer from expansion from other countries of those kinds of horticultural produce which can be produced in our country.

To overcome the negative trends in the formation of the fruit and vegetable market of Ukraine it is necessary first of all to direct the production to the market for the fullest satisfaction of the consumer demand and gaining a maximum profit. It should be kept in mind that absence of buyers makes the existence of production impossible. The main principles of functioning of market relations should be economy, competition, protection of consumers and producers. Protection of farm producers from import and monopoly in processing and selling should be carried out by uniting producers, creating their own processing and selling cooperatives.

The most urgent problem in commercial fruit production is a problem of investments which requires the search for their effective sources. The investments should be first used for the introduction of up-to-date technologies of growing fruits

and berries, their processing and storing, reconstruction of processing enterprises, development of infrastructure of fruit and berries market and marketing system at enterprises.

Under the conditions of the modern economic crisis the branch needs target crediting (for the term of no less than 5 years), increase of budgetary appropriations, 1% charges from the amounts of money received from selling alcohol drinks and beer for the development of fruit, vine and hop production, attracting foreign investors.

The competitiveness of farms increases with the increase of volumes of storing and processing of produce in the places where it is grown and with the organization of enterprises' own trade. The location of storage facilities on the farms will ensure the reduction of the highest workloads on transport, expenses due to transporting commodities of highest quality, better employment of rural residents in the off season. As for participation of farms directly in trading activities it is good only during the transition period to market economy. During other periods it is unreasonable to distract part of funds for organization of trade, it is better to invest the money into the improvement of production. This leads to more productive work and higher amounts of returns on investments.

The researches proved high efficiency of specialization of fruit production and agro-industrial integration of the branch. It is important that a horticultural farm should sell not the intermediate but a final product which will give a higher final result.

Efficient fruit production is a complex system of producing, processing, storing and distributing commodities in accordance with the necessity of full satisfaction of consumer needs supplying them with the produce of high quality. It includes the sphere of production of fruits and berries in different categories of farms, the sphere of processing fresh fruits and berries at the canneries of different production capacities and at canning plants of lower production capacity in individual farms, as well as the sphere of procurement, procurement-distribution and trade-purchase enterprises and the trade system of fruit production output.

Efficient functioning of fruit production predetermines the necessity of creating the economic conditions for the functioning of specialized farms of different organizational-legal forms, development of producers' cooperation and integration and improvement of the economic mechanism of relationships with processing and trade enterprises which guarantee selling the produced commodities. Economic relations can be grounded on the principles of mutually advantageous cooperation or creation of integrated systems. The development of infrastructure of fruit and berry market should ensure the creation of wholesale markets, auctions, trading-distributing and production-trading associations, trade firms and houses, trading-purchasing enterprises etc. Regular supply of fruits and berries for customer consumption during a year is expected.

Conclusion. Thus, the development of commercial fruit production needs the consolidation of organizational-economic factors with technical and technological ones. The main directions of drastic changes in economic situation in fruit production are the improvement of the use of available resources of farms and bio-climatic potential of the regions by means of the introduction of intensive, resource saving

technologies of growing fruits and berries, expansion of the network of enterprises specialized in the production of fruits and berries, improvement of location of orchards, improvement of structure of variety composition of plantations, increase of processing and storing the produce in the places where it was grown, study of measures to increase the efficiency of perspective forms of farming.

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Современное состояние развития садоводства в Украине

Садоводство — традиционная отрасль сельского хозяйства Украины, которая имеет многовековую историю. Потенциально плодоягодное производство Украины в состоянии обеспечить как внутренние потребности, так и производить садоводческое производство на экспорт. Но современный уровень производства плодов и ягод в Украине очень низкий по сравнению со странами развитого садоводства.

Теоретической и методологической основой исследований стали диалектический метод познания и системный подход при изучении научных трудов отечественных и зарубежных ученых.

Промышленное садоводство в годы реформирования аграрного сектора в большинстве сельскохозяйственных предприятий стало убыточным и постепенно ликвидируется как отрасль. В Украине основными производителями плодов и ягод в 2011 году были личные крестьянские хозяйства — 84,19%. За исследуемый период наблюдается изменение видовой структуры производства: если в 1990 году продукция садоводства была представлена в основном семечковыми культурами, которые в общем объеме предложения занимали 75,5%, то в 2010г. — объемы предложения этих культур сократились до 62,3%.

Начиная с 1996 года в целом в общественных хозяйствах страны садоводство стало убыточным. В 1999 году уровень убыточности этой отрасли составил 30,7%, объем убытка — 22,1 млн грн. Однако, в 2011 году уровень рентабельности составил 17,9%, что свидетельствует о возрождении отрасли.

Итак, отрасль находится в условиях кризиса и для ее преодоления необходимо осуществить ряд организационно-экономических преобразований. А именно: внедрение интенсивных ресурсосберегающих технологий выращивания, расширение сети предприятий специализирующихся на производстве плодов и ягод, совершенствование размещения садов, улучшение структуры породного и сортового состава насаждений, расширение переработки и хранения продукции в местах ее выращивания, разработка мероприятий по повышению эффективности перспективных форм хозяйствования и т.д.

Ключевые слова: отрасль садоводства, кризис, перспективы развития, плодоягодная продукция.

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The current state of development of horticulture in Ukraine

Gardening — the traditional agricultural sector of Ukraine, which has a centuries-old history. Potential production of fruits and berries in Ukraine is able to provide both domestic needs and to produce horticultural products for export. But the current level of production of fruits and berries in Ukraine is very low compared to developed countries gardening.

Theoretical and methodological basis of research are dialectical method of cognition and systematic approach in the study of scientific publications of domestic and foreign scholars.

Industrial gardening during the reform of the agricultural sector in most farms became unprofitable and gradually eliminated as a branch. In Ukraine, the main producers of fruits and berries in 2011 were private households — 84.19%. Over the period there was a change of species structure of production: in 1990 gardening products was represented mainly by granular cultures, which in total supply occupied 75.5%, in 2010 — the volume of supply of these crops decreased to 62.3%. Since 1996, in general in the public farms of the country the horticulture became unprofitable. In 1999, the industry loss ratio was 30.7%, the amount of loss — 22.1 million. However, in 2011 the rate of return was 17.9%, which indicates a revival of the industry.

Consequently, the industry is in crisis and to overcome it should be made a number of organizational and economic transformations. Namely, the introduction of resource-intensive production technologies, expansion of enterprises specialized in the production of fruits and berries, improving the allocation of gardens, improving the structure and species composition of varietal plantations, expansion of processing and storage of production in its cultivation areas, development measures to increase the efficiency of promising forms of economic management, etc.

Key words: horticulture industry, crisis, prospects, fruits and berries products.