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GLOBAL TRANSFORMATIONS OF INTERNATIONAL ORGANIC AGROFOOD MARKETS

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Globalization of the international economy has a significant impact on the agricultural market. The article reveals the economic and social prerequisites of global transformations and market changes in international markets for organic agricultural food. The aim of this paper is the theoretical and practical study of determinants for globalized development of global and domestic organic food market and justification of priorities in the implementation of national interests in this field. The peculiarities of the market development of organic agricultural food are identified and its structure is investigated. Given the processes taking place in the world markets, the imperfections of institutional support of the Ukrainian market is highlighted. On the basis of scientific and special methods of economic research, the methodological approach to the definition of complex instruments stimulating the market development of organic agricultural products in Ukraine was proposed and justified and the proposals for harmonization of methods of its state and market regulation through the introduction of a system of measures, which include regulatory, financial and communication tools, was made. The conclusions regarding the importance of creating conditions for operation of agricultural markets integrated into international ones in Ukraine were drawn.

Keywords: global transformation, market conditions, organic agricultural production, organic agri-food product market, supply and demand.
JEL Codes: Q01, Q55, M14.

1. Introduction

The consequence of the world economics globalization is an integrated, functionally and institutionally structured multi-level system, the typical sign of which is an asymmetric development of its elements conditioned by the difference of evident and latent potentials. The main task in these conditions is now an optimal adaptation to the global economy with the maximal saving of national interests and minimization of financial and economic, social and demographic, political and environmental risks. The leading integrating link of the global economical system is the world market and its structural branch elements Globalization of agrofood markets and impact of external competitive environment become determinant for national business entities, and global interdependency and complementarity of all sectors of national economics

transforms social and political, organizational and economical, information and technological, ecological and resource conditions of countries development. The main success determinants in the conditions of global development are represented by structural reorganization of external economic potential with strategic orientation at competitive products export. An important potential item of the national agricultural sector export potential is represented by organic agrofood products of crop production and animal husbandry. These features conditioned the choice of the research subject.

The works of such scientists as U. Bek (2001), O. Bilorus (2001), V. Vlasov (2004), D. Lukianenko (2010), S. Maistro (2009), I. Pakhomov (1997), P. Sabluk (2008), S. Sokolenko (2002, 2004), D. Held (1993) et al. are dedicated to the issues of establishing of the global development model, impact of economics globalization on structuring and transformation of market relations, determination, perspectives and ways for adapting Ukraine to these processes. The works of such scientists as S. Antonets (2010) and A. Podolynskyi (1994) are dedicated to many-sided research of the issue of organic agricultural production method spreading. The issues of economical efficiency of economical activities in the sphere of organic farming are reported in scientific works of O. Dudar (2012), O. Khodakovska (2011), B. Shuvar (2012) et al. The aspects of organic agrofood market formation were considered by E. Boyko (2011), O. Kozlova (2011), A. Mazurova (2009), O. Rudnytska (2007) et al.

The goal of study is the theoretical and practical study of globalization determinants of global and domestic organic agrofood market development and explanation of priority approaches of implementing the national strategy in this sphere. *The object of study* is the process of functioning of global and domestic organic agrofood market entities and adaptation of national agricultural goods manufacturers to the conditions of globalized world economics. *The subject of study* is the totality of theoretical, methodological and practical aspects of forming and development of the organic agrofood market and development of business entities' mechanisms of adaptation to global economy conditions.

2. Research Methodology

Methodological support for the research is based on the principle of theory and practice unity and the system and synergetic approach. It considers the development of the agricultural sector branches development from the perspective of the holistic paradigm and within the concept of its multi-functional development while taking into account the close interconnection of economic and organizational, social and political, ecological and natural factors and priorities. Due to this approach, the main branch issues considered from the perspective of integrity and continuity of the object, the subject and the environment, objectives, methods and controlling means, were identified. The systematic approach methodology allowed identifying the problematic aspects of the branch functioning and the agrofood market forming components at all levels: functional, empirical, methodological and institutional at the certain abstraction level. The comparison method was applied in determining the peculi-

arities of activities of countries – organic food manufacturers. By the means of economical and statistical method, there was processed an array of statistical data which were collected on the basis of sociological polls, including peer reviews, at determining peculiarities of supply and demand formation in the sphere of organic agricultural production; matrix methods, in particular, PESTLE analysis for determination of positive and negative factors of the branch development were also used. Table and graphic methods were used at performing the graphic reflection of contemporary state and development tendencies of the domestic organic food market.

3. Findings

The organic food manufacture is carried out almost in all countries of the world. The leading manufacturers are Australia, Argentina, the USA, Italy, and Spain. As of 01.01.2012, 39.04 mln. ha, or 0,9% of agricultural lands in the world are used for organic food production. The most widely spread agricultural organic cultures are coffee (0,54 mln. ha), olives (0,49 mln. ha), cocoa (0,26 mln. ha), nuts (0,2 mln. ha) and grapes (0,19 mln. ha) (Organic …, 2011, The World …, 2011). Such land distribution is conditioned by and reflects the structure of global demand to organic food. The volume of the global organic food market is 59.1 bln. USD in 2011, and as of 2012 this parameter increased to 62.9 bln. USD. The countries with the largest volume of organic food market are the USA, Germany and France. However, the high consumption level can be observed in Denmark, Switzerland and Austria (Schaack Diana, 2012, The World …, 2011). The organic food industry sector also grows very fast. In such countries as Denmark, Austria and Switzerland, organic food consumption is from 4,5 to 5,5% in the general consumer goods basket (Vision for …, 2008).

The forecasted volume of the global organic food market in 2014 will increase in comparison with 2011 by more than 22%, and the number of organic food manufacturers in the world will increase for the same period by more than 37% (Helga Willer, 2012). The main volume of organic food production is provided by the countries of North America (33%), Europe (27%) and South America (23%). At this, organic agricultural production spreads the most fast in European countries which is confirmed by the growth of area of agricultural lands involved in this sphere, almost twice for the period under consideration (The Organic …, 2011, Developing …, 2011). The other regions, such as Asia, South America and Australia, are the important organic food manufacturers and exporters. Consumer demand to these products is concentrated in North America and Europe. Total share of these two regions in the volume of the global organic food market is 97 % (The World …, 2011). (Table 1).

Table 1. Forecast of organic agricultural production spreading in the world and in Ukraine

Parameter	Year									Fore-cast	2014 to 2010, %
	2005	2006	2007	2008	2009	2010	2011*	2012*	2013*	2014	
Volume of the global organic food market, mln. USD	33200	38600	40200	46100	50900	54900	59110	62900	67760	72080	131,3
Number of organic products manufacturers in the world, mln. manufacturers	0.61	0.72	1.22	1.4	1.8	1.97	2.31	2.6	2.89	3.18	161.7
Number of agricultural lands under organic production in the world, mln. ha	28.97	30.08	32.31	35.23	37.09	37.04	39.89	41.72	43.56	45.4	122.6
including	-	-	-	-	-	-	-	-	-	-	-
Africa	0.49	0.68	0.86	0.86	1.03	1.08	1.23	1.34	1.45	1.57	145.6
Asia	2.68	3	2.89	3.35	3.57	2.78	3.31	3.38	3.46	3.54	127.3
Europe	6.76	7.27	7.77	8.27	9.2	10	10.46	11.11	11.75	12.39	123.9
South America	5.06	4.95	6.42	8.07	8.49	8.39	9.79	10.62	11.45	12.27	146.3
North America	11.76	12.38	12.07	12.11	12.15	12.14	12.23	12.27	12.3	12.34	101.6
Australia and Oceania	2.22	1.79	2.29	2.58	2.65	2.65	2.87	3.01	3.16	3.3	124.4
Volume of the Ukrainian organic food market, mln. USD	0.156	0.313	0.392	0.47	0.941	1.882	1.748	2.054	2.352	2.658	141.3
Number of agricultural lands under organic production in Ukraine, ths. ha	241.9	242	249.8	269.9	270.1	270.2	270.32	289.0	296	303.03	112.1

* The International statistical data base for the relevant years is not yet formed or is formed partially.

In Ukraine, the organic food market is at the initial development stage but availability of fertile soils, location in favourable climactic zones and advantageous geo-economic location are the evidence of a large potential for its further development. Ukraine has a considerable potential to increase the organic land areas. This market is rather attractive for manufacturers because demand to organic products increases gradually (Lupenko, 2013). Organic agrofood products can become an important item of the national agricultural sector export potential. In the domestic organic food production structure, crop production prevails, in which the largest unit weight belongs to cereals production. The value of crop capacity received by the en-

terprises under consideration - organic food manufacturers – approaches to average indices throughout Ukraine, and in some cases even exceeds them. During 2010–2012, production of animal husbandry organic food, economic efficiency of which production is lower, in distinction from crop production, recovered. The pricing policy adjustment mechanism in the sphere of organic agricultural production is not set up in Ukraine. The price difference between organic and common products, on the level of wholesale trade, is negligible. The highest profit at the organic food market is received by distribution networks or food manufacturers who sell their products independently.

With the purpose to determine features of demand forming, two expert sociological polls (Yatsenko, 2010) were carried out. In 2012: poll of managers and specialists of factory-farm enterprises – organic food manufacturers (33 managers) and poll of managers and specialists of factory-farm enterprises (47 managers). According to the study results, 34% of respondents are fully satisfied and 63 % are partially satisfied with the results of their business activities in the sphere of organic farming. Such a considerable percentage of experts having the certain doubts concerning justification of expectations from organic entrepreneurship is, in the first turn, conditioned by primitive institutional environment and the line of different factors. On the other part, it is an obvious fact that this sphere is attractive and the majority of manufacturers who began their activities in it will keep trying to hold their positions. Among the reasons that made them conduct business activities in the sphere of organic farming, organic products manufacturers mark out, in the first turn, moral satisfaction from these activities (33%), obtaining the additional income (44% of respondents), obtaining competitive advantages (22% – for organic products manufacturers, 21% – for common agricultural products manufacturers). At this, the respondents operating in the sphere of organic farming, determine the goods quality (28%) and the company reputation (21%) as the most important distinctive features of their enterprises

In spite of the optimistic assessment of their own activity results, the majority (50%) of the organic products manufacturers who took part in this poll answered the question ‘Do you think that favourable conditions for organic farming development were created?’ with the variants ‘no’ and ‘partially’ – 44%. Among the main factors stimulating the organic agrofood market, 20 % of the respondents mark out the provision of state financial support to manufacturers, along with the line of benefits and preferences, research and education development, provision of consultative and information services to manufacturers, growth of demand to organic food. At this, at characterizing the potential customer by classification criteria, the organic food manufacturers noted that in terms of sensibility to the products quality they are too sensitive and sensitive by family status and family life status cycle stage – family couples with children, by solvency – people of moderate means and means over moderate; from the point of view of adaptation to new goods they are innovators and moderate conservators.

Concerning factors of organic agrofood market suppression, opinions of the first and the second study members differ. For example, if directors of enterprises op-

erating according to the principles of organic entrepreneurship mark out, in the first turn, lack of state support (22%), domestic statutory and regulatory basis in the sphere of organic agricultural production which is not yet formed (21%) and low purchasing capacity of the population (16%), manufacturers of the traditional agricultural products mark out low purchasing capacity of the population (26%), low awareness of consumers about organic products (23%) and competition from the side of imported goods (20%). The relevant development tendencies for the domestic organic agrofood market can also be determined through PESTLE analysis (Table 2).

With regard of the existing transformation processes in the sphere under consideration, the following three variant scenarios can be forecasted: optimistic (high growth rates of supply and demand, wide range of goods, advantage of the organic products export to import, market gain rate over 15%, etc.); realistic (temperate increase of supply and demand, undeveloped range of goods, market gain rate 10–15 %); pessimistic (diminution in supply and demand, diminution in range of goods, worsening of the goods quality indicators, etc.). The realistic scenario of the branch development (Kozlova, 2011) is the most possible. In such conditions, development of a branch with growth strategies, namely, diversification, market development (Green markets…, 2013) and deep global markets penetration is the most reasonable.

The important value at studying the organic food market regulation methods belongs, on the one part, to investigation of the leading world experience which can be adapted to realia, and, on the other part, strict following the WTO rules (Tsygankova, 2003). The first governmental plans for support of organic products manufacturers were introduced in 80-ies of the last century in Denmark and Sweden (Policy for organic farming, 2011). In 2004, the first all-European program of the regional organic sector development for the period to 2008 under the name ‘European organic food agriculture development plan – development of criteria and procedures for assessment of EU action plan in the sphere of organic farming’ was adopted. During the last decade, 26 European counties adopted organic action development programs (Organic …, 2012).

Table 2. PESTLE analysis of development tendencies for the domestic organic agrofood market

Factors	Characteristics		Impact +,–
	Positive	*Negative*	
Social	- Availability of qualified and competent human resources potential; - High level of the world market customer loyalty to the products; - Positive attitude of the certain segment of Ukrainian consumers	- Low level of solvency of the population majority; - Low level of environmental awareness; - Insufficient level of consumer confidence in the quality of organic food of domestic manufacture; - Worsening of the demographic situation in the country	+,–
Political	- Political will of the state leadership reflected in the relevant legal acts	- Political and financial and economic instability in the state; - Lack of state support of organic food branch manufacturers; - Lack of efficient political and organization and economical mechanisms; - Lack of state support for scinetific research; - Low awareness of consumers about organic products	–
Legal	- Initial stage of forming statutory and regulatory basis on regularization of relationships at the organic food market	- Incomplete compliance with European and international standards for quality, safety and technical requirements of the whole range of goods; - Imperfection of the accompanying statutory and regulatory basis of market regulation and agrofood production; - Lack of national certifying organizations and laboratories	–
Economical	- High level of organic products differentiation; - Profitable export-oriented production; - Favourable economic conditions and pricing policy at the international market; - Not enough satisfied demand to ecologically clean products at the international market	- The undeveloped organic food market; - Lack of efficient economical motivations for food manufacturers at the domestic market; - Low business activity and ineffective marketing policy of food manufacturers; - Low level of financial resources; - Low level of profitability at the domestic market; - Lack of official statistical data base; - High inflation level; - Low investment attractiveness; - Inefficient pricing policy in this segment;	+,–
Technological	- Initial stage of forming the relevant equipment and technological basis	- Lack of national manufacturers of competitive and ecologically safe equipment and technologies	–
Natural and climactic	- Sufficient and good resource potential; - Possibility to produce the organic food in the most regions of the country; - Availability of ecological network lands; - Advantageous geographical and geo-economic location of Ukraine	- Presence of lands polluted with radiation	+

Note: the «+» symbol means the principally positive factor impact; «+, -» - fragmentary impact; «-» - no impact.

An initiative for educational issues in the sphere of organic farming is worth special attention. With this purpose, Coordination of European Transnational Research in Organic Food and Farming, CORE Organic was implemented in 2004. 11 countries took part in this project: Austria, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Sweden, Switzerland, and the United Kingdom. The project was completed in 2007. As the result, the leading countries – organic food manufacturers be-

came those countries which took part in CORE Organic (Vision …; 2008). Thus, following the state policy aimed at organic farming distribution served as one of stimulating factors for development of this kind of activity. The instruments used at this are rather variable: financial support, information support, legislation basis creation, etc. that is, in order to achieve the maximal level of efficient stimulating the national organic agronomic production branch, the use of state support including at least three groups of instruments: financial, statutory, and communication, is necessary.

Thus, summarizing all above-mentioned information, the following conclusion can be made.

The organic agricultural method meets the established requirements, which leads to its popularity growth and, as the result, to increase of volume of both global and domestic organic food market. Within the market development strategy, an important issue is development of sales infrastructure of the stated products, namely, market outlets both all over Ukraine and in its regions. Demand for organic food increases from year to year. For example, those groups of goods (like wheat, flour) at which domestic production can satisfy consumption requirements practically in a full volume are exported due to undeveloped sales system at the domestic market and the unsettled pricing mechanism. And here occurs the need of opening specialized markets on which the organic agriculture products will be sold by farm enterprises and the other enterprises. In order to overcome barriers of the further organic farming implementation into the economic practice, it is, without any doubt, necessary to provide state assistance to organic entrepreneurship. Governments of many countries all over the world pay the considerable attention to the organic sector support. At this, the stated assistance is of versatile and mostly complex nature, which ensures the continuous development of the mentioned sector. The result of such assistance is the tendency to conquer the leading positions at the global organic food market by those countries which provide the considerable state support to the organic products. Organic farming plays the important role in providing food security and agricultural development due to distribution of ecologically safe farming systems. The importance and topicality of the stated production is confirmed by the considerable attention given to it by governments of the numerous countries around the world. In particular, the EU countries within the general agricultural policy stress the importance of the organic agriculture development. With the purpose to develop the organic food market, a system of measures including regulatory, financial and communication tools, is being implemented in most of these countries.

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GLOBALINIAI POKYČIAI TARPTAUTINĖSE EKOLOGINĖS MAISTO PRODUKTŲ RINKOSE

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Santrauka

Tarptautinės ekonomikos globalizacija reikšmingai veikia žemės ūkio produktų rinkas. Straipsnyje nagrinėjamos ekonominės ir socialinės globalių transformacijų tarptautinėse ekologinių žemės ūkio ir maisto produktų rinkose sąlygos. Tyrimo tikslas – teoriškai ir empiriškai įvertinti globalius pokyčiuos tarptautinėse ir vietinėse ekologiško maisto rinkose bei pagrįsti nacionalinių interesų įgyvendinimo prioritetus šioje srityje. Aptariami ekologiško maisto rinkų vystymosi bruožai ir struktūra. Atsižvelgiant į pasaulio rinkose vykstančius procesus, nurodomi institucinės paramos iškraipymai Ukrainos rinkoje. Atsižvelgiant į tyrimo rezultatus pasiūlytas priemonių kompleksas, skirtas skatinti ekologiškų žemės ūkio produktų rinkos plėtra Ukrainoje. Pasiūlytos priemonės apima reguliavimo, finansinius ir komunikacijos instrumentus. Apibūdinama integracijos į tarptautines rinkas svarba.

Reikšminiai žodžiai: globalios transformacijos, rinkos sąlygos, ekologinė žemės ūkio produkcija, ekologinių žemės ūkio ir maisto produktų rinka, paklausa ir pasiūla.
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