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Consideration of world trends towards hop and hop products market as a component of management mechanism of branch development

Scientific problem. The export and import policy of the state, being effective control mechanism of hop growing industry functioning, is a powerful factor that influences efficiency of hop cultivation.

Under the conditions of globalization, the trends towards hopyard areas reduction and simultaneous growth of their productivity and bulk yield have been observed around the world [15]. It is achieved by means of introduction of the newest scientific and technical developments, cultivation of prospective sorts with high contents of alpha acid. The vivid example of this, in particular, is hop production in Germany, which has been constantly increasing its part in global hop production in recent years [1, p. 137].

Integration processes of hop cultivation in the world influence the planted areas, bulk yields, and especially quality and cost of the product. There is a further concentration of production of the main component of hop (alpha acids) in the leading countries of the world. The current state in the industry is characterised by the trend of hop material volumes production growth and increase of productivity in relation to the cost of final product [2, p. 154-155].

According to the World Bank, the leading countries spend up to 100 bln dollars on agricultural industry development. Hop growing in all developed states, first of all in the USA, the EU countries, China, Australia and others, is under the system of state support measures, introduced, in particular, by creating barriers for import of products (by means of customs fees, non-tariff restrictions, import taxes, etc.), as well as direct support by grants, preferential financing and other forms of support. Decrease of domestic hop material market protection level under the conditions of Ukrainian membership in the WTO (reduction of the state support of hop growing industry) can be compensated by increase of production efficiency [3, p. 231-232, 235].

This requires a well-balanced approach concerning realisation of all requirements of the WTO, introduction of methods and mechanisms of hop growing support, theoretical substantiation that would protect economic interests of our state in the development of this industry [4, p. 236].

Integration processes in the world in the sphere of hop and hop materials production during recent 10-15 years have taken place according to the requirements of brewery industry which was accompanied by reduction of hop planted areas and decrease in use of alpha acids per beer unit. Beer production in the world is based on use of processed hop material – pellets and extracts – which guaranties minimum raw material storage losses [5, p. 356-357].

Considering the fact that development of the hop growing industry is largely influenced by export and import policy of the state as well as by world integration processes of hop and hop materials production, evaluation of efficiency and productivity of these processes is topical for the research.

Analysis of recent researches and publications. The study of world integration processes in the course of hop and hop materials production and their influence on the development of the hop growing industry as well as concentration of production trends have been analysed in the works of such researchers as O. M. Shatylo [1,2], T. Yu. Sitnikova [3],

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T. S. Muliar [4], A. S. Malynovskyi [5], V. M. Deboi [6], T. M. Ratoshniuk [7] and others.

The research of integration processes in the world market of hop and hop materials production and their use, as well as their influence on the state and development of the hop growing industry and the hop market in Ukraine require further study and analysis.

The objective of the article is evaluation of integration processes in the world in production of hop and hop materials at the present stage of hop growing development, analysis of the state export and import policy efficiency in the market of hop products.

Statement of the main results of the study. During 2006-2012 the area of hopyards was constantly decreasing. The reasons of such situation were increase of hopyards productivity by introduction of more efficient sorts of hop and low prices on hop which did not satisfy the producers [8, p. 6].

The USA, Germany, China, the Czech Republic and Poland were the largest producers of hop in the world for nine years (2002-2012). Herewith, all the countries reduced the hopyard areas (except the USA, where 1.4 times growth of hopyard areas was observed until 2009). At the same time, the hop growing areas around the world increased during the specified period of time in Germany and the USA by 3.9 and 6.4 per cent accordingly, while all the other countries observed the reduction of such percentage.

So, in 2002-2012 the part of the abovementioned two countries made up 75 % of the world cultivated production volumes as well as the largest part of hop cultivation areas. Due to this fact these two countries determine the situation on the world hop market. The highest productivity of hop in 2012 was observed in China – 25.5 tons per hectare, the USA – 21.5 tons per hectare, Australia – 24.4 tons per hectare, Germany – 20.1 tons per hectare, Southern Africa – 21.9 tons per hectare, the lowest productivity was in Ukraine – 9.8 tons per hectare, Poland – 12.0 tons per hectare, the Czech Republic – 9.9 tons per hectare. It is necessary to notice that during the specified period of time the hopyards area in Ukraine reduced almost in 2.7 times (by 771 hectares), the bulk yield in 2012 (454 tons) was the lowest among the countries since 2002, however, productivity increased in 2 times.

During recent years Ukraine has lost its positions in the list of the countries with developed hop growing industry in terms of planted areas. The gradual upward trend of hop cones bulk yield, observed for 7 years, was followed by attenuation of the industry development rate. It has moved Ukraine from the 7th to the 9th place in the general list of the countries with the largest hop planted areas, to the 13th place by the bulk yield of hop, and to the 16th place by the bulk yield of alpha acids. Besides, Ukraine occupies the18th place in the world by hopyards productivity [9].

The reason of losing the rating positions by Ukraine concerning the areas of hop plantings and bulk yield in the world testifies about the inefficiency of the state support, control and management of hop growing development during the last years, in particular regarding the export and import operations.

One of the reasons to decrease the areas of planting was the increase of content level of α – acids in hop cones owing to the cultivation of more productive sorts; there are cultivated by the world leaders of hop growing as well as in such countries as Spain, Australia, the Republic of South Africa, New Zealand, and Ukraine.

According to the scientist O. M. Shatylo [2, p. 151, 154-155] the dynamics of the planting area, bulk yield, and, especially, the quality of hop as a specific component of beer were affected by the integration processes in the world. Highly developed export oriented brewing industry of Ukraine which is quickly increasing during last decade requires the constant volume gain of qualitative hop production.

Thus, the scientist A. S. Malynovskyi [5, p. 136] underlines that the world beer production is basically based on the use of hop processing goods – granules and extracts, thus the world hop market is mainly based on the previous contracts between commodity producers and processing companies and product providers.

Sharing the idea of the previous authors the scientist V. M. Deboi [6, p. 307, 310-311] also considers that the basis for market conditions at hop cultivation in the world is the stability of goods market which is supported by the previous contracts between commodity producers and processing and hop realization companies, in particular, the preliminary prices for products of hop which determine the sort content, quality, and the stable price.

So, the world integration processes at production of hop and hop products are basically connected with the requirements of the brewery industry [16]. The market saturation of hop and hop products, great possibilities of choice as well as the entering of Ukraine into the WTO and opening of borders underlines the urgency of export and import operations, the state customs policy on functioning of hop growing industry.

So, the conducted analysis of volume dynamics of world production of beer during last 12 years (2000-2012) testified that such volumes increased almost by 40 %. The volume dynamics of world production of beer in 2000-2012 is shown in Table 1.

1. Volume dynamics of world production of beer (million gal)

Year	Europe	Including Ukraine	America	Africa	Australia / Oceania	Asia	**In total in the world**
2000	481.3	10.4	480.8	61.7	21.1	350.5	**1395.4**
2001	492.3	13.1	474.8	63.4	21.0	369.2	**1420.7**
2002	504.9	14.9	479.0	63.2	21.6	375.7	**1444.3**
2003	514.6	16.6	479.6	66.2	21.4	396.6	**1478.5**
2004	529.7	17.3	490.0	70.7	20.9	440.7	**1552.1**
2005	543.3	23.7	502.9	74.2	21.1	456.5	**1598.1**
2006	568.6	26.7	519.6	79.7	22.0	506.5	**1696.4**
2007	591.8	31.6	533.2	85.1	21.8	555.6	**1787.4**
2008	585.8	32.0	544.1	91.5	21.6	578.2	**1819.2**
2009	553.6	30.5	544.9	99.6	21.6	597.9	**1817.6**
2010	541.7	31.0	544.2	106.8	21.6	632.0	**1846.4**
2011	549.5	30.5	565.4	112.3	21.7	679.9	**1928.8**
2012	545.2	30.1	571.2	125.1	21.6	688.2	**1951.3**
2012 in % till 2000	113.3	289.4	118.8	202.8	102.4	196.3	**139.8**
Market specific weight, in 2012, %	27.9	1.5	29.3	6.4	1.1	35.3	**100**

Source: data calculated according to the reports of Joh. Barth and Sohn Company [9].

According to Table 1 in 2012 over one third of the world production of beer referred to the Asian market, whereas the European and American market occupied 27.9% and 29.3% accordingly. Despite the fact that the Ukrainian market in general world volumes occupies only 1.5% (2012), its essential growth almost in three times was marked (during 2000-2012). The gain of brewing products almost in twice was observed in the specified period in the countries of the African continent and the Asian countries; thus the European and American markets remained quite stable (the gain made 11.3 % and 18.8 % accordingly).

Since 2004 till 2007 the brewing industry increased the production volumes (by 5.2% annually) as its needs in hop increased gradually. At the same time the adverse weather conditions in 2006 caused the reduction of bulk yield of hop in the world by 8800 tons (or 9.3%), α-acids – by 910 tons (or 11.5%), and the available deficit reached 1585 tons in comparison with the previous year. Thereafter brewers had to economize and it resulted in considerable quantity reduction of adding hop to beer. Nowadays the average quantity of α-acids makes 3.4-4.1 g/gal (it is about 1 g of dry hop per a liter of beer with base contents of α-acids of 3.5 %) [8, p. 6-7].

The researches by the group of scientists of the Polissia Institute of Agriculture, National Academy of Agrarian Sciences of Ukraine under the direction of R. I. Rudyk [10, p. 103-104] stated that after long term deficit of hop products in the world market (1996-2006), in order to satisfy the increasing demand the hop producers expanded the world areas of hop planting according to the modern requirements of the brewery industry. However, the correction of the situation with deficit quickly turned into the considerable excess production (thereafter in 2009-2011 the transitive stocks of hop constituted about 45% of the world annual requirement). Such a situation forced hop producers in the world to get to fast market balancing which led to volume reduction of hop production. Ukraine also was not an exception concerning the negative consequences of excess hop production in the world.

Volumes of export and import of goods appreciably depend on the situation in the brewing industry and in the hop market [17]. Ukraine imports hop products from the countries of Europe whereas the export of the Ukrainian hop is mainly carried out to the CIS countries (in particular, during 2007-2011 the main consumers of the Ukrainian hop were Russia, Belarus, Moldova which share in the export structure made up on the average about 70 percent).

At the same time, due to the absence of long-term contracts domestic producers have no stable foreign market outlets. Considering the fact that the greatest manufacturers of hop in the world are such countries as Germany, the Czech Republic, China and the USA, they play the dominant role in formation of import and export operations. Thus, in the light of integration processes in Europe due to no adaptation of the Ukrainian standards on hop raw products, domestic producers found themselves in difficult conditions. As the result the procedure of confirmation of conformity of products according to the international standards, technical norms (regulations) requires unjustified additional costs from domestic producers which reduces their competitiveness.

According to the researchers one of the reasons for reduction in demand for domestic hop there is also the uncontrolled introduction of isomerized preparations in beer production by brewing companies which are based on substances of unnatural character. The State Sanitary and Epidemiological Service of Ukraine points to the absence of scientific researches concerning the hazard level of these chemical substances for the health of people [10, p. 106-107].

On the other hand, the leading European countries such as Germany, the Czech Republic on the contrary strictly stick to the national traditions in beer production being guided by the famous acting food law on cleanliness of beer which was adopted in 1516. According to the law adopted by the Bavarian duke Wilhelm IV it is required to brew beer only of barley, hop and water; it is a kind of a «cleanliness testament» [11]. As a consequence only cones of hop and granules are used in beer production in these countries.

Sharing the ideas of the think tank of the Polissia Institute the export and import operations in the market of hop production according to the official statistical reports by the State Customs Service of Ukraine were analyzed within the research.

So, during 2004-2012 Germany, Slovenia, the USA, the Czech Republic were the main importers of hop and hop products in Ukraine which part in total import makes over 98 percent. The volume dynamics of foreign trade of Ukraine concerning the import of hop and hop products in 2004-2012 is shown in table 2.

According to the data in the table the greatest specific weight in the import structure of hop and hop products in 2004-2012 is occupied by Germany and the USA; these countries imported products worth 35287 and 7872 thousand USD or 65.9 percent and 14.7 percent accordingly of total amount within the specified period. Thus in specific weight of the imported values the largest specific weight is occupied by Germany and the Czech Republic; they imported 2654 tons and 3671 tons accordingly, or 34.5 percent and 47.7 percent of total amount. It is necessary to notice that the USA lost the positions in the specified period (import volumes of hop products decreased from 307 tons (52 percent) in 2005 to 80 tons (19.7 percent) in 2012).

2. Volume dynamics of foreign trade of Ukraine concerning import of hop and hop products in 2004-2012

thousand USD/tons

Country	Unit of measurement	Period (years)									
		2004	2005	2006	2007	2008	2009	2010	2011	2012	Total/percent
Germany	ths. USD	1639	1193	1629	3285	13221	3779	3751	4155	2635	**35287/65.9**
	ton	170	193	288	358	1155	285	327	362	253	**2654/34.5**
Slovenia	ths. USD	0	0	0	0	1155	1775	619	270	135	**3955/7.4**
	ton	0	0	0	0	31	127	83	49	22	**312/4.1**
The USA	ths. USD	30	1383	1362	1140	1096	470	85	517	1789	**7872/14.7**
	ton	9	307	210	149	109	41	6	24	80	**935/12.2**

Продовження табл. 2

The Czech Republic	ths. USD	133	555	379	445	3385	73	74	34	348	**5426/10.1**
	ton	23	90	62	45	113	6	6	4	50	**3671/47.7**
Other countries	ths. USD	0	0	113	0	738	88	35	14	20	**1008/1.9**
	ton	0	0	23	0	79	7	3	3	2	**117/1.5**
In total	ths. USD	1802	3131	3483	4870	19595	6185	4564	4990	4928	**53548/100**
	ton	202	590	583	552	750	466	425	442	407	**7689/100**

Source: own researches according to reports of the State Customs Service of Ukraine – «Foreign trade of Ukraine with noting main countries – counterparts» and «Total volume of import and export in the countries on commodity positions according to codes Ukrainian Commodity Classification for Foreign Economic Activity (UCCFEA) (thousand US dollars)» for 2004-2012 [12-13]. According to a commodity code behind the Ukrainian Commodity Classification 1210 «Hop cones, fresh or dry, broken or non-broken, ground or granulated, lupulon».

Since 2008 the considerable part of imported hop products has been supplied from Slovenia. The largest quantity of hop production and hop products was imported to Ukraine from abroad in 2008 which was the consequence of previous lack of raw products; thus during 2008-2012 import volumes decreased in 1.8 times (or by 343 tons).

In 2004-2012 hop and hop products were exported by Ukraine both to the CIS countries and the European Union. The volume dynamics of foreign trade of Ukraine concerning the export of hop and hop products in 2004-2012 is shown in Table 3.

3. Dynamics of the volumes of foreign trade of Ukraine concerning the export of hop and hop products in 2004-2012

thous. USD/tons

Country	Unit	Period (years)									
		2004	2005	2006	2007	2008	2009	2010	2011	2012	Total/per cent
Belarus	thous. dollars	0	10	10	80	221	111	42	53	45	**572/12.1**
	tons	0	5	5	11	13	24	16	16	19	**109/11.7**
Moldova	thous. dollars	38	112	0	106	497	163	48	82	57	**1103/23.3**
	tons	8	25	0	13	13	16	8	17	13	**113/12.1**
Poland	thous. dollars	53	0	0	462	0	0	0	0	44	**559/11.8**
	tons	19	0	0	32	0	0	0	0	14	**65/7.0**
Russia	thous. dollars	0	0	3	196	0	98	59	42	31	**429/9.1**
	tons	0	0	5	14	0	88	73	45	40	**265/28.5**
Czech Republic	thous. dollars	0	0	752	0	0	167	284	0	0	**1203/25.4**
	tons	0	0	144	0	0	24	63	0	0	**231/24.8**
Other countries	thous. dollars	80	7	0	122	132	54	133	169	167	**864/18.3**
	tons	4	2	0	11	11	6	25	51	38	**148/15.9**
Total	thous. dollars	1802	3131	3483	4870	19595	6185	4564	4990	4928	**4730/100**
	tons	202	590	583	552	750	466	425	442	407	**931/100**

Source: in-house researches according to the reports of the State Customs Service of Ukraine – «Foreign trade of Ukraine indicating the basic countries – contractors» and «Total volumes of import and export over the countries by the commodity items according to UCCFEA codes (thousand US dollars)» during 2004-2012 period [123-124]. As specified in the goods code according to the Ukrainian qualifier of the foreign trade activities goods 1210 «Cones of hop, both fresh and dry, broken and not broken, ground and granulated, lupulon».

According to the data provided in the table Germany takes almost quarter in the structure of the hop and hop products export in Ukraine in 2004-2012. At the same time the export of hop and hop products to such CIS countries as Russia, Belarus, Moldova during the specified period totaled 487 tons worth 2104 thousand USD that makes accordingly 52.3 per cent and 44.5 per cent to the total amount and cost of the exported products.

Throughout almost 10 years the price of the imported hop and hop products exceeded the price of the exported, except 2007 when the export price of one tone of hop and hop products 1.4 times exceeded the import price (equivalent to 3.1 thousand USD).

In 2005-2008 the price for import had advantages within 12-26 per cent and since 2009 this price differential has considerably increased. In particular in 2012 the average realization price for the purchased hop and hop products constituted 12.1 thousand USD per ton whereas the realization price of the exported products made 2.8 thousand USD per ton, i.e. 4.3 times (or 9.3 thousand USD) cheaper. The specified fact has negatively affected the balance of the export and import trading operations in the hop market.

So, the conducted analysis shows that throughout the last almost 10 years period the balance of the export and import trading operations is characterized by the constant negative value which creates risks for the industry development restraint and the existence of such tendencies is the catalyst of negative and crisis phenomena in the activity of the industry. In general throughout 2004-2012 period the total negative value of the export and import trading operations balance in the hop market exceeded 48 mln USD.

The situation when the brewing enterprises disregard the domestic hop products due to their low quality, the purchases of the hop products mainly abroad using "shadow" schemes creates the risks for formation of social pressure and creation of disbalance in the labor market, in particular in the hop growing regions of Ukraine.

So, according to the information provided by the Association of Hop Producers of Ukraine during the last years there exists the limited use of the domestic hop products as the big brewing companies with the foreign capital undertake the agreed anticompetitive activities and purchases of the hop products with affiliation of tender committees which perform their activity exclusively abroad and that's why the national manufacturers of hop are displaced from the market of its realization. During the last years, under the conditions of the absence of economically stipulated factors, we can observe the sharp reduction of the realization price for the hop products in Ukraine. In particular, the realization price for a ton of aromatic sorts of hop decreased in 2010, in comparison with 2008, more than 10 times and constituted 12-15 thousand UAH. (157.4 thousand UAH in 2008 and 31.2 thousand UAH in 2009). Herewith, the annual requirement in the hop products by the domestic brewing companies is over 5 thousand tons a year [14, p. 26-27].

The researches conducted by the laboratory of the department of hop and beer biochemistry of the Polissia Institute of Agriculture, National Academy of Agrarian Sciences of Ukraine which is certified for the quality determination of the hop products using international methods, ascertained that domestically produced hop of 2009-2011 crop met the national standards. Herewith, the existing Ukrainian standards are higher than the Regulations of the EU countries. Therefore the Ukrainian hop, if it completely conforms to the national standards, entirely satisfies the European quality level [10, p. 107].

Besides, the absence of the appropriate effective state customs policy concerning the protection of the domestic hop producers gives the possibility to import hop and hop products paying customs duties on the assumption of the customs value and quantity of the imported goods while the brewing companies during their pricing for raw products take into account the contents of alpha-acids in a product unit which several times exceeds the similar contents in the domestically grown hop, and as consequence the price disparity of the imported and domestically grown raw products and failure to compete in the domestic market.

The Ministry of Revenue and Duties of Ukraine in its letter (of August 15, 2013 № 10/77/5/99-24-02-04-16) addressed to the Ministry of Agrarian Policy and Food of Ukraine expresses its concern as to the risks of probable reduction of the customs value and volumes of the hop and hop products imported to the customs territory of Ukraine.

So, during this period the conducted research established that in 2012 the balance of hop and hop products made 713 tons (the domestic hop producers manufactured – 430 tons (including 14 exported tons), herewith 407 imported tons) that is non-compatible with the quantity the raw products annually used by the brewing companies (over 5000 tons every year) and creates the risks of artificial raw products usage (in particular isomerizated tetra and hexahydroisoextracts) which are imported to the country according to other qualifiers of the goods of the foreign trade activities.

So, we can see the signs of unfair competition, abuse by the domestic brewing companies of almost monopoly position in the market of the hop consumption in Ukraine which actually destabilizes the activity of the domestic hop producers, creates unpredictable situation in the internal agricultural market. All specified facts create the risks concerning the acceleration of unemployment rates growth especially in the rural regions in Polissia region of Ukraine, in particular in Zhytomyr oblast.

Conclusions. The USA, Germany, China, the Czech Republic and Poland are the biggest hop manufacturers in the world for the last nine years (2002-2012), herewith we can observe the reduction of areas for hop cultivation in all countries.

The world integration processes of hop and hop products production are basically connected with the requirements of the brewery industry. The saturation of the hop and hop products markets, great choice possibilities, and also accession of Ukraine to the WTO and opening of the borders emphasize the urgency of the export and import operations, the state customs policy upon the functioning of the hop growing industry.

The CIS countries (Russia, Belarus, Moldova) took the biggest part in the structure of the hop and hop products export in Ukraine in 2004-2012, herewith the import structure during the specified period was occupied for more than 80 % by Germany and the USA.

We can see the signs of unfair competition, abuse by the domestic brewing companies of almost monopoly position in the market of the hop consumption in Ukraine which actually destabilizes the activity of the domestic hop producers, creates unpredictable situation in the internal agricultural market. All specified facts create the risks concerning the acceleration of unemployment rates growth especially in the rural regions in Polissia region of Ukraine, in particular in Zhytomyr oblast.

The absence of the appropriate state export and import policy and support of the hop growing industry have not provided its promotion as a competitive direction in the agrarian sector of the economy of Ukraine which could be capable of providing not only the brewing industry of the state with the raw products, but also could create conditions for the budget increase of all levels.

Besides the inefficient customs policy, under the conditions of anticompetitive activity on the part of the brewing companies (which are mainly based on the foreign capital), increases the disbalance of the imported and domestic hop products, limits the access of the latter in the domestic hop market and creates the risks of the artificial raw hop products in the brewing industry. So, during almost 10 years period the price of the imported hop and hop products exceeded the price of the exported hop and that’s why during 2004-2012 period the general negative balance of the export and import operations in the hop market has reached over 48 mln USD.

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Новини АПК

Виробництво та експорт молокопродуктів

За січень–квітень 2014 року виробництво молока порівняно з аналогічним періодом 2013 року зросло на 1,7% (або на 50,9 тис. т) і становило 3051,3 тис. т. Зокрема, в сільськогосподарських підприємствах збільшилося на 5,2% (або на 41 тис. т) і досягло 835,9 тис. т, у господарствах населення – на 0,4% (або на 9,9 тис. т) і становило 2215,4 тис. т.

За 4 місяці поточного року зросли обсяги промислового виробництва масла вершкового – на 30,2%, молока обробленого рідкого – на 11,1%, але зменшились обсяги виробництва сирів жирних – на 15,5%, молока сухого – на 8,9%, продуктів кисломолочних – на 5,9%, сирів кисломолочних та неферментованих – на 4,1%.

Експорт молочних продуктів у січні–квітні 2014 року становив 34,8 тис. т на загальну суму 127,2 млн дол. США, що на 9% менше (або 3,2 тис. т) ніж у січні–квітні 2013 року. Найбільшу частку експорту молокопродуктів складали сири – 33% (або 11,4 тис. т), молочна сироватка – 27% (9,5 тис. т), молоко згущене – 22% (7,5 тис. т). Вітчизняними переробними підприємствами експортовано 1,98 тис. т масла вершкового, що в 6,5 раза більше, ніж за відповідний період минулого року.

Слід зазначити, що зменшення експорту молочних продуктів пов'язано з встановленням обмежень Російською Федерацією в поточному році на імпорт української молочної продукції, зокрема сиру твердого. У січні–квітні 2014 року експорт сирів твердих зменшився на 36%, або на 6,3 тис. т.

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