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The potential of the grain market in Ukraine: problems and prospects

Scientific problem. During recent years, Ukraine has achieved the considerable progress in the crops production. Since 2008, the domestic producers three times (2008, 2011, 2013) increased the maximum level of productivity that had been achieved in 1990 (51 mln tons). In particular, in 2013 the croppage reached 63 mln. tons, the top volume in the history of domestic grain production. The export of grain had increased annually and in 2013 it made 27.1 mln tons (9 times more if compared to 1990). At the current stage of Ukraine's development the increase of grain export is extremely important. It provides the efficiency of agricultural production and foreign currency earnings of Ukraine (in 2013 they totaled 6.2 billion USD). However, this forced and somewhat one-sided approach was based on the lack of proper capacity of the domestic grain market, low levels of the livestock production and the low spending capacity of the population. Under these conditions, the loss of added value within the country is observed. In order to keep the added value the grain market should be optimized. We share the opinion that it is irrational to export large volumes of grain as the feed for the livestock farming production that

Ukraine imports losing the added value and jobs.

Analysis of recent researches and publications. The studies of the world and domestic grain markets have been reflected in the publications of the economists as follows: V.G. Andreychuk [1], V.R. Boyiv, M.O. Borhunov [2], P. I. Haidutskiy, V.M. Heyts [3], O.V. Zakharchuk, S.M. Kvasha [4], I.V. Kobuta, M.G. Lobas, I.I. Lukinov [5], V.V. Myloserdov, Z.P. Nikolaeva, B.I. Paskhaver [6], V.Y. Protasov, P.T. Sabluk, V.F. Saiko, V.P.Sytnyk, A.A. Storozhuk, O.M. Shpychak [7], and others [13-15]. However, in current conditions of the significant increase in grain export volumes it is important to perform the thorough research necessary for optimizing the directions on utilization of domestic corn taking into account the benefits for Ukraine.

The objective of the article is to offer the optimal and wide range approach on grain usage which provides the supply of the own food needs at the level of food consumption standards, especially in bread and bakery products; live-stock origin products which require the utilization of grain; the needs in bioethanol (in the conditions of the Ukraine volatility) and increase of export potential of livestock production which require grain as feedstock. This will

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increase the efficiency of using grain by way of increasing the added value within Ukraine, as well as the creating more jobs which will increase the competitiveness of Ukraine in the variable world market conditions.

Statement of the main results of the study.
The top volumes of grain crops during recent years have been achieved due to the significant increase of corn production (Figure 1).

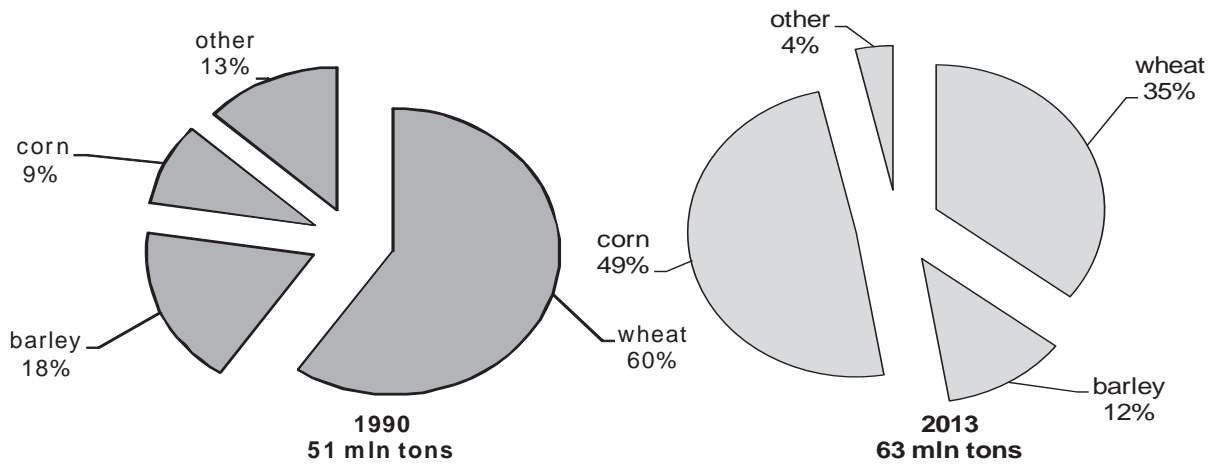


Figure 1. Production of certain types of cereal crops in Ukraine. Structure and dynamics

Source: The State Statistics Service of Ukraine.

In 2013 the gross grain yield of this cereal crop increased up to 31 million tons, which is 6,6 times more than in 1990. The corn takes 49% share in grains structure, whereas in 1990 this figure was 9%. However, during the above indicated period, for other types of cereals (except rice) decrease in production as well in productivity were observed, especially in cereals and legumes, which had critical indicators.

Their gross yield reduced in more than three times. Hence, there had been significant structural changes in the grain production. If the harvesting crops area during this period increased in only 9% (from 14.5 million hectares - to 15.8 million) the area of corn – increased 4 times, i.e., from 1.2 million hectares – to 4.8 million (Figure 2).

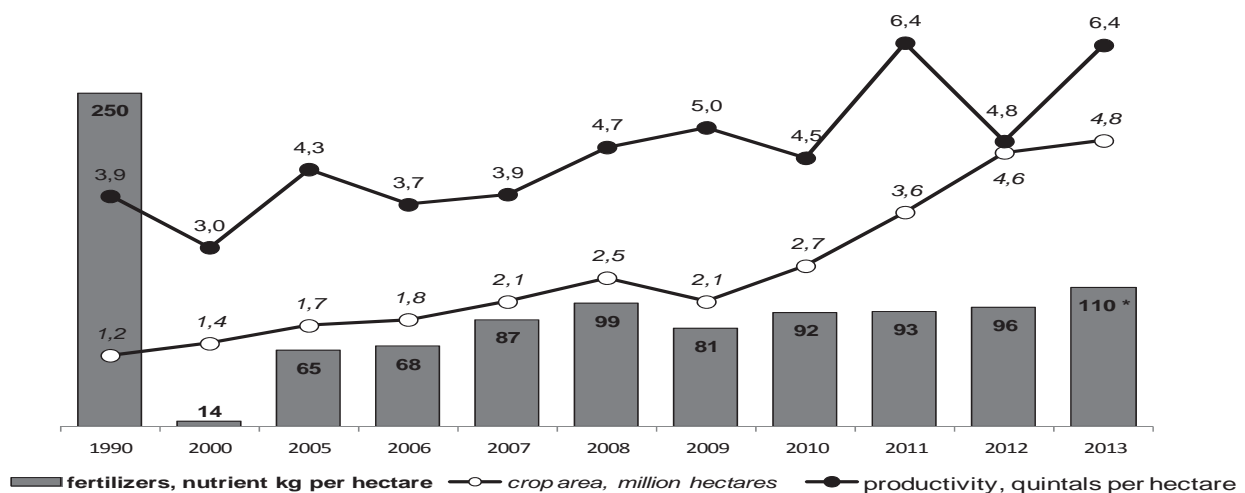


Figure 2. Acreage and usage of fertilizers for corn crop in Ukraine. Dynamics

* Preliminary data

Source: The State Statistics Service of Ukraine.

Several factors influenced upon this situation. First, the achievements in plants selection (creating early maturing corn hybrids with high moisture exchange) and climatic changes taking place in Ukraine and worldwide as well. These factors made it favorable to expand the range of corn cultivation in the northern regions of Ukraine. Thus, during 1990-2013 in the Polissia region the crop area of corn increased tenfold. Also, the development of plants selection has made it possible to implement the new hybrids with high yield potential. [8] During recent years, there have been significant scientific advances in corn growing technology using leaf-feeding with micronutrients to provide higher ratio in utilizing the nutrients [9]. The average corn productivity level by 2013 had increased to 64 quintals per 1 hectare, which is 1.6 times higher if compared to 1990. The researches prove that during this period the

usage of fertilizers was decreased. Thus, according to the State Statistics Service of Ukraine [10] (for the period of 1990-2012) this indicator decreased in 2.3 times.

Such significant advance in the production of corn has formed a huge export potential. In particular, the volume of corn export in 2013 totaled 16.7 million tons and the revenues totaled USD 3.8 billion. This resulted in the position of Ukraine as one of the three leading grain suppliers in the world [11]. However, such large export flows of corn (the main cereal crop for the livestock feeding branch) are formed on the background of the live-stock production import and the consumption of meat (meat production) and milk 34.5 and 43.4%, respectively, lower than stipulated by the consumption standards and in connection with the low spending capacity of the population (Table 1).

1. Consumption of basic foods in Ukraine per capita (kg per year).

ITEM	Rational consumption Standards	Minimum consumption Standards*	2012	2012 (in %)	
				to Consumption Standard	to Minimum Consumption Standard
Meat and meat products	83	50	54,4	65,5	108,8
Milk and dairy products	380	331	214,9	56,6	64,9
Eggs (quantity)	290	224	307	105,9	137,1
Bread and bakery products	101	94	109,4	108,3	116,4
Potatoes	124	99	140,2	113,1	141,6
Vegetables, melons and gourds	161	105	163,4	101,5	155,6
Fruits, berries and grapes	90	66	53,3	59,2	80,8
Fish and fish products	20	12	13,6	68,0	113,3
Sugar	38	26	37,6	98,9	144,6
Oil	13	7	13,0	100,0	185,7

*Calculations based on the Regulation by the Cabinet of Ministers of Ukraine dd. April 14, 2000 # 656 "Basic foods and nonfood products standard sets and lists of services for major social and demographic groups of population" based on population structure in 2012.

Source: The author calculations based on The State Statistics Service of Ukraine data.

In particular, as of November 2013 the wages in the developed countries of the world if compared to Ukraine were several times higher. Thus, in France, the U.S. and the Czech Republic with the respective monthly salary

(retail prices) one could buy milk 8 times more, pork 11 times, beef - 8, poultry – up to 4.8, fuel – 11.6 times more if compared with Ukraine. The wages in Ukraine was higher only in comparison to Moldova (Table 2).

2. The level of monthly salary and comparison of spending capacity of population in certain countries (November 2013)

Country	Average salary level		Milk	Beef	Pork	Poultry (carcass)	Diesel fuel, (litres)
	USD a month	in % to Ukraine					
Ukraine, kg.	408,0	100	438,7	60,7	70,3	154,6	334,4
Quantity of production which can be bought with the salary level in selected countries (in % to Ukraine)							
Belarus	598,4	146,7	303,1	221,0	223,9	132,2	180,7
Kazakhstan	691,0	169,4	154,4	148,0	155,2	125,6	308,4

Moldova	295,2	72,4	79,2	90,0	83,9	59,7	69,0
Russia	898,7	220,3	179,7	197,6	195,1	177,3	274,2
Germany	3402,0	833,8	583,1	572,9	744,0	433,3	535,4
France	2682,0	657,4	804,4	374,4	516,6	390,0	407,1
Czech Republic	1262,0	309,3	306,0	251,6	351,1	278,7	214,4
USA *	4400,0	1078,4	407,7	806,1	1113,0	483,4	1164,3

Note:

- Average consumer prices in Ukraine are based on prices monitoring of the most important goods. The monitoring is carried out by the the State Statistics Service on ten-day interval;
- The average salary in Ukraine in September 2013 (source: website of the State Statistics Service of Ukraine);
- Average retail prices and wages in other countries, provided via e-mail by the Embassies of Ukraine in these countries;
- Average exchange rate of the National Bank of Ukraine as for Nov.11, 2013 amounted 7.9930 UAH for 1 USD (source - the official website of the National Bank of Ukraine).

* Information concerning the New York city.

Source: The author independent research.

Studying the experience of the United States, Canada and France as well shows the necessity in diversifying the usage of grains produced in Ukraine. The world's largest producers and exporters of these products (Table 3) with the full support of domestic demand for grain and livestock products, they export not only crops, and also supply the world market

with dairy, meat products, bioethanol. For all these production the grain is used and it occupies the share in the global labor distribution. It meets the demands of a successful business principle "Never keep all your eggs in one basket" and provides a higher competitiveness of the Ukraine in the changeable world market conditions.

3. Production and usage of grain and livestock products (kg*) per capita in selected countries

Indicators	USA **	France **	Ukraine
Crops			
Production	1305	1094	1013
Consumption	108	120	146
Used for live-stock feeding	466	376	354
Export	282	557	610
Other	449	41	97
Meat			
Production	137	93	49
Consumption	120	87	54
Export	20	24	3
Milk			
Production	284	388	249
Consumption	256	247	212
Export	26	165	18

* USA, France – 2010 Ukraine - 2012

** The consumption of meat and meat products (except animal fats), milk and dairy products (except oil).

Source: Compiled by the author according to the FAO and the State Statistics Service of Ukraine.

For example, France produces 1094 kg. of grain per capita, which is 21 % lower than the best domestic (Ukraine) indicators (in 2013 – 63 million tonnes, 1385 kg. per capita), the share of grain export in production area is 51 %. The consumption of meat in France has reached 87 kg., which is 61 % higher than in Ukraine. Meanwhile, France exports livestock products - 24 kg. of meat and 165 kg. of milk per capita, 8 and 9 times respectively more than Ukraine. The U.S. grain production per capita is 1305 kg. with only

22% of export abroad. In this case, the consumption of meat and milk is provided at 120 and 256 kg. per capita respectively, while export of meat makes 20 kg. per capita which is 6.7 times more than in Ukraine.

It should be noted that Ukraine used to keep the similar positions. In particular, in 1990 – 981 kg. of grain per capita was produced and its export volume totaled only 3 million tons (58 kg. per capita), while the volume of feed stock - 28 million tonnes (538 kg. per capita). With the

consumption levels – 68 kg. of meat and 373 kg. of milk on domestic market their export totaled 5.2 and 2.2 times more if compared to 2012.

354 kg. of grain per capita was spent for feeding the livestock sector of Ukraine in 2012. In the United States and France the figures are 466 and 376 kg. As we can see, the difference between them is less if compared to the difference in the

consumption and export of livestock products. One of the reasons is the different structure of meat consumption (Table 4). In the developed countries this structure is more balanced, more beef production is consumed with lower costs for concentrated feeds. Also, in our viewpoint, Ukraine experiences some problems with the statistics monitoring when determining the amount of feed stock.

4. The structure of meat consumption in certain countries (kg. per capita*)

	USA		France		Ukraine			
	kg.	%	kg.	%	Rational consumption standard		2012	
					kg.	%	kg.	%
Meat, total	120,2	100	86,7	100	83	100	54,4	100
Beef	39,8	33	25,5	30	33,2	40	8,7	16
Pork	30,1	25	31	36	29,1	35	21,1	38,8
Poultry	49	41	22,3	25	16,6	20	23,7	43,6
Other	1,3	1	7,9	9	4,1	5	0,9	1,6

* USA, France – 2010. Ukraine – 2012.

Source: Compiled by the author according to the data of The FAO and the State Statistics Service of Ukraine.

Optimization of the grain market will help to reduce the import of low-quality livestock products to Ukraine. The volume of imported milk and meat in 2012 were respectively 382 and 431 thousand tons with 63 % of imported pork in the total volume of meat and the main component in the ration of pigs breeding is a coarse grain, which Ukraine exports.

It should be noted that 795 million USD were spent for purchasing the livestock origin products from the world market in 2012, and it totaled 20% of foreign currency earnings obtained from exporting corn.

Note, that the imported products often have poor quality. The proof of this is the fact that they are delivered to Ukraine from places miles away from our country and are sold 25-30% cheaper than domestic raw products. Such products are distributed due to the low spending capacity of population which greatly impairs the competitiveness of Ukrainian producers with higher quality livestock production as well as it's not healthy for consumers of such products.

We believe that along with the increase of spending capacity is necessary to expand the usage of grain: the satisfaction of own demands on consumption standards level, including livestock products, export of grain and livestock production, using grain for processing into bio-ethanol which will result in obtaining products with much higher added value.

Ukraine has already been making use of positive experience in reorienting the export of feedstock supplies, particularly sunflower seeds, sunflower oil, products with higher added value. Such approach made it possible to obtain USD 3.3 billion of foreign currency earnings in 2013. In addition, more investments were involved into fat-and-oil industry and the number of jobs was increased.

We have made a comparison of generating the value-added options at different calculation points, including direct export of grain which is already in stock and at the condition of its processing into pork or milk. The generating of gross added value which includes the process of grain production and its further way to export or use in the livestock industry were also studied.

To make the calculations easy for understanding the 100 thousand tons of grain were taken as an example. The correlation between types of cereals (wheat, barley, corn) was taken at the level of actual export structure of these types of grains.

The study has determined that the added value in export of already produced grain according to the accepted structure makes USD 24.5 million, which is 15 % of the exported grain value (at a rate of 100 thousand tons).

The calculation of the added value while using grain in livestock industries (provided that grain for feeding was harvested) has been car-

ried out in two ways: separately, in milk and pork production.

The first direction. By using 100 thousand tons of grain, we can produce 260 thousand tons of milk (taking into account the proportion of concentrated food which is actually formed in rations) and get UAH 132.8 million of added value which is 5.4 times more if compared to the cost of this grain when exporting. In addition, it will help to create 930 additional jobs under the conditions of production processes at specialized dairy processing facilities.

The second direction. Using 100 thousand tons of grain makes it possible to produce 18 thousand tons of pork (and taking into account the proportion of concentrated feed which is actually formed in the rations) and get UAH 163.4 million in added value that 6.7 times more if compared to the cost of this grain exporting. 440 additional jobs will be created in this case. Of course, it's possible at the condi-

tion of production at high technology fattening facilities. If we take into account the private households the number of jobs can be significantly increased.

According to our calculations the further processing of meat and milk in the food industry can be increased (in value added within Ukraine) and make 9.4 times in meat production, 8.8 times in milk if compared to the export of grain.

Additionally, we have made calculations of the gross added value to provide a calculation point starting from grain production. The research has determined that the gross added value generated when producing grain and processing it into milk or meat (based on the actual structure of livestock farming by category) 2.2 times (in milk) and 2.5 times (in meat) exceeds the gross added value which is created during the production of grain and its export. In general, the results of the comparative analysis of added value are shown in Figure 3.

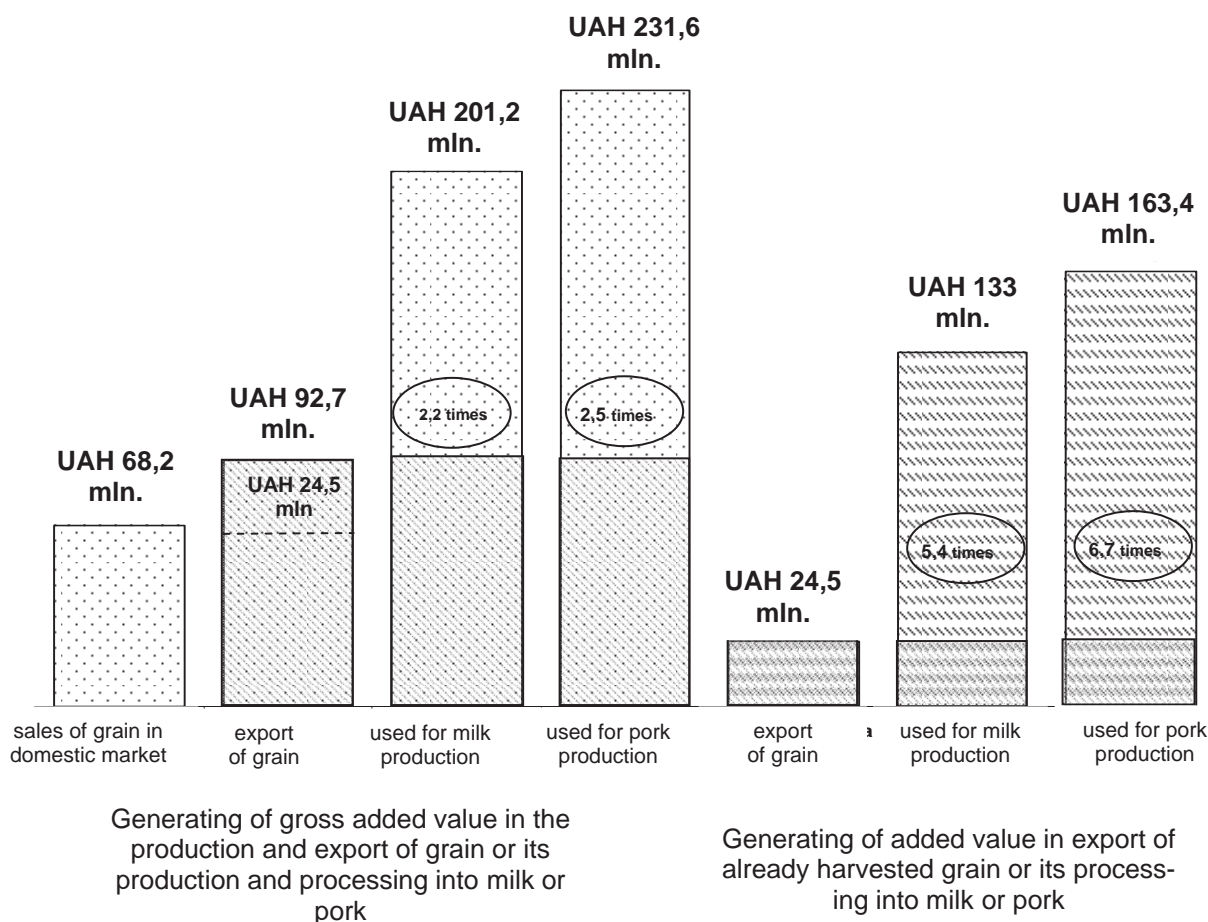


Figure 3. The comparative analysis of generating gross added value when producing and exporting 100 thousand tons of grain and processing it into milk or pork as of period of 2012 (including the production in all categories of farming)

Source: The author independent research.

Another direction of grains usage within the country (especially under conditions of Ukraine's volatility) is their processing into bioethanol. For example, in the U.S., which is the largest producer of bioethanol in the world (54%) more than USD 30 billion are saved annually on importing of petroleum products. However, we believe that the implementation of this strategic direction in grain usage should be considered as the priority to ensure national demands in food. We have developed the methods to determine the threshold values for economic feasibility of processing cereals and corn into bioethanol in Ukraine [12, p. 309 - 337]. The proposed algorithm for calculation involves comparison of the effectiveness when using grain for export or processing it into

ethanol. The price of 1 ton of conventional gasoline A-95 type (at petrol stations in Ukraine), 1 barrel of crude oil (on the world markets), the price of ethanol (taking into account the use of by-products) has been taken as the threshold criteria.

Fig. 4. Shows the optimal and wide spectrum distribution of grain produced in 2013 to provide Ukraine's own needs in food, particularly, in bread and bakery products, live-stock products which require grain for their production process, to supply needs in bioethanol at the conditions of the Ukraine volatility and to increase the export potential of Ukraine in live-stock products which utilize grain as a feed-stock source.

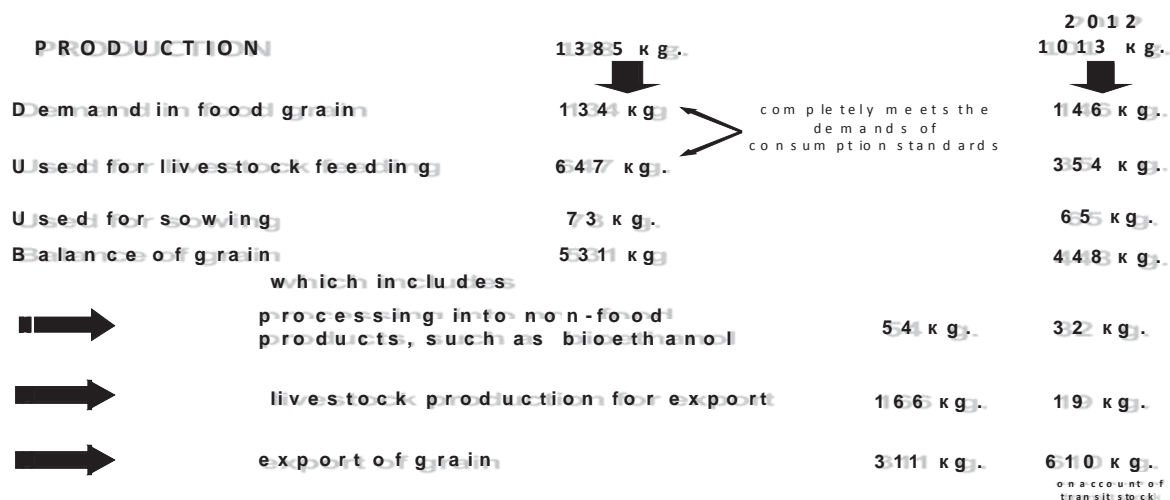


Figure 4. Prospective directions of grain usage under the conditions of production volumes in 2013 (kg., per capita)

Sources: The author research, the data of the State Statistics Service of Ukraine.

This approach will improve the efficiency of grain usage by increasing the added value within Ukraine, creating more jobs and competitiveness of the country under the variable conditions of the world market.

Conclusions. The significant increase of corn production has been reflected in high yields of grain during recent years. The main factors contributing to this are the scientific achievements of the selectionists to create highly productive and early maturing corn hybrids with high moisture exchange along with the climatic changes which were favourable for the productivity and expanded the range of corn cultivation. In addition, there have been significant scientific ad-

vances in technologies of mineral fertilizers usage, including application of foliar sheet feeding plants, which provides higher utilization of nutrients.

Huge export flows of corn, which is the main cereal forage crops for the livestock production sector in the current environment is a necessary measure and these flows are being formed in the background of importing livestock products along with the less consumption of meat and milk than is specified by the consumption standards for the population in Ukraine.

Besides, the raw material export influences on the loss of a significant part of the added value. It has been determined that at the calculation point

of already harvested grain in milk producing process the resulting sum of added value is 5.4 times higher if compared to its export. If case when grain is used for pork production the increase makes 6.7 times, respectively). Also, it will create the additional 930 and 440 jobs. In further processing at the food industry facilities the increase in added value will make 8.8 times (milk) and 9.4 times (pork).

Additionally, the gross added value, which provides a calculation point from grain production to its further processing into milk or meat (taking into account the actual structures of livestock farming by category) exceeds the same indicator from growing wheat to its export in 2.2 and 2.5 times in milk and meat, respectively. At the same time, we have to import large quantities of low-quality live-stock products in which corn exported from Ukraine is used. Unfortunately, currently the building of necessary new livestock farms for expanding the livestock production is problematic due to the lack of adequate financial investments and it's time consuming process as well.

Under such circumstances it would be reasonable to use the existing livestock facilities and human resources of private households where the bulk of pork and milk is produced. At the same time, they should be provided with the required quantity of forage and young stock as the commodity loan. The settlement of payments can be performed with live weight of fat stock. There's no doubt it is a temporary measure, but currently this is the only way we can efficiently achieve objectives as follows: to avoid import-

ing of low-quality meat production, to reduce the unemployment in rural areas, to increase the income of countrymen, to increase the domestic quality livestock production and increase the added value which is decreasing.

It should be noted that under conditions of "malnutrition" Ukraine has a definite advantage over the countries with the highest level of food consumption due to the fact that in Ukraine, along with the adequate spending capacity the domestic distribution area will also be ensured. Additional production outputs will be directed to supply the internal needs in achieving sustainable nutrition standards in Ukraine.

The further studies are required to determine the volume of the added value in the export of live-stock products. The specifics of these calculations will be defined by the assortment, quality and the range of dairy and meat products processing.

The convincing proof of effectiveness in exporting advanced processing products over feedstock supplies is the fact that Ukraine refused to export sunflower seeds and focused on sunflower oil and achieving the leading position in the world in trading volumes of these products.

In addition, to explore the possibilities of resolving the issue of Ukraine's volatility the efficiency of exporting grain or its processing into bioethanol should be compared.

The application of the proposed optimization approach will enable the domestic grain market to achieve the successful business principle "Never keep all your eggs in one basket".

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The article has been received 02.06.2014

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Новини АПК

Оперативна інформація Мінагрополітики: хід польових робіт

Станом на 27.06.2014 р.

I. Хід польових робіт

У 11 областях країни розпочато збирання ранніх зернових та зернобобових. Зібрано 557 тис. га при врожайності 27,9 ц/га (у 2013 р. – 24,9 ц/га), намолочено 1556 тис. т зерна нового врожаю, у тому числі:

- ячменю обмолочено 497 тис. га, при врожайності 28,4 ц/га та намолочено – 1411 тис. т;
- пшениці обмолочено 59 тис. га, при врожайності 24,3 ц/га, намолочено – 142 тис. т;
- гороху обмолочено 1 тис. га, при врожайності 21,61 ц/га, намолочено – 2 тис. т.

Крім того, ріпаку обмолочено 41 тис. га, при врожайності 16,2 ц/га, намолочено – 66 тис. т.

II. Стан посівів сільськогосподарських культур

Зернові культури (озима пшениця, озимий ячмінь), а також озимий ріпак знаходяться у фазі дозрівання.

Кукурудза залежно від строків сівби знаходиться у різних фазах листоутворення.

Цукрові буряки. На ранніх посівах триває ріст кореня та розпочалося змикання рослин у рядках, на пізніх посівах триває листоутворення.

Соняшник. На більшості площ посівів цієї культури утворюються суцвіття, на пізніх посівах триває листоутворення.

У цілому стан і розвиток сільськогосподарських культур проходить задовільно.

III. Структура посівних площ

За прогнозними даними, посівна площа сільськогосподарських культур під урожай 2014 року очікується на рівні 26,9 млн га, що на рівні минулого року, в тому числі: ярих зернових – 7,9 млн га, технічних – 7,5 млн га, з них цукрових буряків 333 тис. га, що на 13% більше проти минулого року.

Ситуація на ринку зерна

Стан експорту зерна на 27.06.2014 р.:

Фактичні обсяги експорту становлять 32122 тис. т, з яких: пшениці – 9265 тис. т; кукурудзи – 20061 тис. т; ячменю – 2444 тис. т та інших зернових – 350 тис. т.

Крім того, знаходиться у припортових елеваторах 769 тис. т зернових культур (пшениці – 266 тис. т, ячменю – 455, кукурудзи – 284 тис. т), завантажено на кораблі – 157 тис. т.

Таким чином, обсяги експортованих та підготовлених до експорту зернових становлять 33,2 млн т (пшениці – 9,5 млн т, ячменю – 2,8 млн т, кукурудзи – 20,4 млн т).

Цінова ситуація на внутрішньому ринку зерна:

Ціни попиту на зерно врожаю 2013/2014 МР в даний час коливаються залежно від регіону: на пшеницю 3-го класу – від 1790 до 2700 грн/т, на фуражну пшеницю 6-го класу – від 1659 до 2650 грн за 1 т.

У даний час ціни на продовольчу та фуражну пшеницю сформувалися такі: на пшеницю 3-го класу – 2297 грн/т, на фуражну – 2162 грн/т.

Середні ціни на ячмінь становлять 1950 грн/т, на кукурудзу – 2053 грн/т.

Прес-служба Мінагрополітики України