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Analysis Of The Current State And Prospects For The Development Of Agriculture In The Stavropol Territory.

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ABSTRACT

The article analyzes the state of agriculture in the Stavropol Territory in the long-term and short-term retrospective. The factors constraining the accelerated progressive development of the industry are identified. Proposed state support measures aimed at improving the structure, stabilization of agricultural production, restoration of the livestock industry in the region.

Keywords: agriculture, government support, investment climate, concessional lending.

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INTRODUCTION

Stavropol Territory is one of the leading producers of agricultural products in Russia, plays an important role in ensuring the country's food security. Its share in the production of the all-Russian gross grain harvest is 8.5%, sunflower 4.9%, sugar beet 5.1%, livestock and poultry in slaughter weight 3.5%. The industry largely determines the state of the entire economy of the region, forming about 18% of the gross regional product, 21% of its own budget revenues and providing employment for 17% of the regional labor force.

Over the past 15 years, significant positive changes have taken place in the agrarian sector of the economy of Stavropol. Compared to 2013, grain production increased by 44%, reaching 10.2 million tons in 2017, the gross harvest of sunflower increased by 39% during this period, sugar beet - by 1.5 times, greenhouse vegetables - by 3, 3 times, meat - by 30%. The level of the average monthly wage of agricultural workers in the Stavropol Territory increased during this period by 1.7 times and in 2017 amounted to 27.5 thousand rubles, exceeding the average Russian level by 12.7%. The profitability of the industry in 2017 was equal to 20.5%, against 13.4% in 2013

At the same time, a retrospective analysis of the industrial and economic results of the industry revealed their instability. There are a number of factors constraining the accelerated progressive development of agriculture in the region.

RESULTS AND DISCUSSION

The agrarian economy of the region is not sufficiently diversified. Established in the Strategy for the Development of the AIC of the Stavropol Territory [1], the optimum from the agrotechnical, economic and social positions, the ratio of crop and livestock industries 60/40 is not maintained. Crop production forms 72% of gross agricultural output, and only 28% comes from animal husbandry, and this disproportion increases every year (Figure 1).

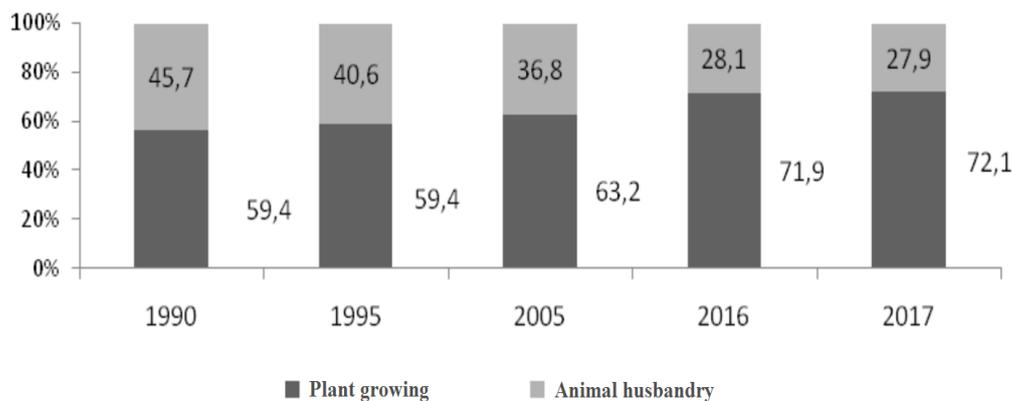


Figure 1: Structure of gross agricultural output in the Stavropol Territory for all categories of farms, %

Table 1: Dynamics of the structure of sown areas in all categories of farms of the Stavropol Territory

Indicators	Sown area, thousand hectares		The structure of acreage, %	
	1990	2017	1990	2017
Total crops	3436,2	3115,0	100	100
including: cereals with corn	1792,2	2403,0	52,2	77,1
of which winter wheat	1260,0	1724,0	36,7	55,5
industrial crops	267,7	521,1	7,8	16,7
potatoes, vegetables, melon field	83,8	53,4	7,8	16,7
feed crops	1292,5	137,5	37,6	4,4

In the structure of sown areas, the proportion of forage crops, which are factors for increasing soil fertility, is steadily decreasing, and the proportion of cereals is increasing. In 2017, the grain wedge reached 77% of the acreage, while the share of forage crops was only 4.4%, that is, 9 times less than in 1990 (table 1).

Meanwhile, perennial cereal leguminous grass mixtures protect the soil from erosion and deflation, accumulate organic matter, improve the physical properties of the soil, enrich the soil with biological nitrogen and thus create favorable conditions for subsequent crops [2]. Decrease in acreage of annual and perennial grasses accelerates the pace of development of degradation processes, worsens the phytosanitary situation, leads to hypertrophied dependence on crop production and, above all, grain, instability of production and economic results.

The structure of crops in the region does not meet modern requirements from the point of view of improving the structure and stabilizing agricultural production and preserving soil fertility, and from the standpoint of restoring and developing the livestock industry in the region.

In 2017, the production of livestock and poultry for slaughter (live weight) in farms of all categories amounted to 1.1 million tons, an increase compared with the previous year by 7.4%. However, the restoration of the potential of the livestock industry is carried out at the expense of poultry meat and pig breeding. Production of milk, meat of cattle, sheep products is reduced.

The dairy cattle industry is in a particularly difficult situation. According to the results of 2017, the Stavropol Territory is the leader among the Russian regions that have allowed a decrease in milk production, whose production volumes for the year decreased by 49.7 thousand tons. The number of cows during this period decreased by 15, 7 thousand heads. The main discharge of livestock occurred in peasant farms - by 7.6 thousand heads; in agricultural organizations - by 3.2 thousand heads, in private farms by 5 thousand heads. As compared with 1990, the livestock of dairy cows in all categories of farms decreased from 349.7 thousand heads to 204.2 thousand heads, that is, by 58.4%.

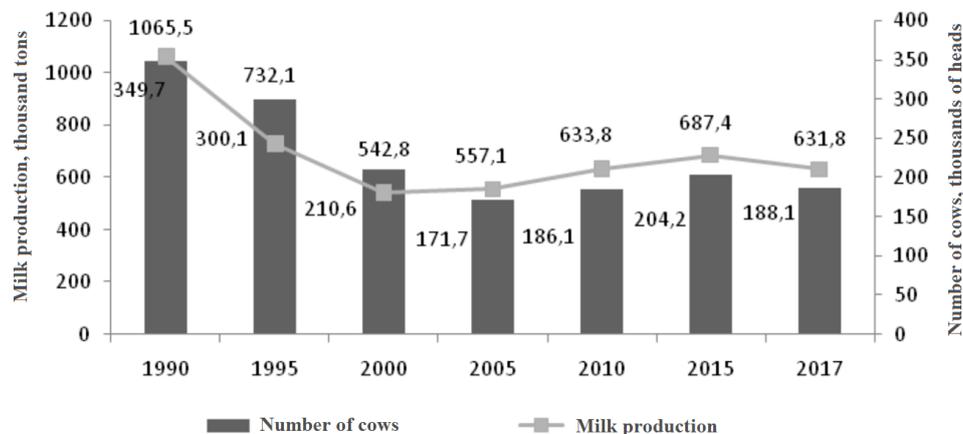


Figure 2: The number of cows and milk production in all categories of farms in the Stavropol Territory.

The productivity of animals is at a low level and on average in the region in 2017 amounted to 4470 kg / head., in agricultural organizations - 6512 kg / head (Figure 3).

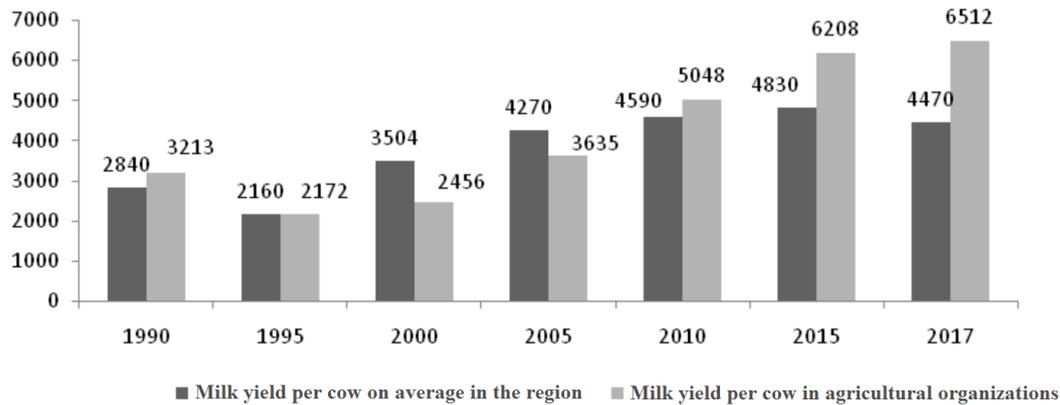


Figure 3: Milk productivity of cows in the Stavropol region, kg / head

The main part of the dairy herd is currently concentrated in households and peasant (farmer) farms, where primitive technologies are used, and the movement of livestock is poorly controlled. Agricultural organizations contain 21% of the livestock of cows, and in nine districts of the region (Aleksandrovsky, Andropovsky, Blagodarnensky, Izbilnensky, Kursky, Neftekumsky, Turkmensky, Arzgirsky, Apanasenkovsky) there are no dairy farms at all. Low productivity and reduction in the number of livestock cause a shortage of milk as a raw material. At the same time, milk consumption per capita in the region does not meet medical standards and is 212.1 kg per year, or 65.3% of the medical norm (the norm is 325 kg / person). This is lower than the average in Russia (233.1 kg / person) by 9%.

The reasons for this situation are in the weak development of the forage and breeding base, the low level of technology and equipment used by most milk producers [3]. Dairy cattle breeding is a capital-intensive industry with long periods of financing and return on investment. It requires special measures of state support in order to make milk production economically attractive for agricultural producers [4].

However, for the years 2014-2016 the amount of state aid to milk producers decreased from 306.2 million rubles. to 251.7 million rubles, or 21.7%, including by the Federal budget by 18.9%, and from the budget of the Stavropol Territory by 10.7%. Currently, government support for the industry in the province is lower than the scale of state assistance to farmers in neighboring regions. Based on one cow in 2016, 1,232.6 rubles of state support was received, which is 4 times less than in the Krasnodar Territory, where it amounted to 5333.8 rubles per head.

An important factor in the development of agriculture in the region is investment activity [5]. A favorable investment climate has been created in the region. Over the past five years, about 50 large investment projects worth a total of 49 billion rubles have been implemented: a powerful greenhouse complex, fruit and vegetable stores, pig and poultry complexes, and the material and technical base of agricultural organizations has been updated. However, the Stavropol region is lagging behind in the amount of investment in fixed assets per 1 hectare of agricultural land and per one employed in the industry from the leading agricultural producers in the country - Belgorod region and Krasnodar region (Figures 4, 5).

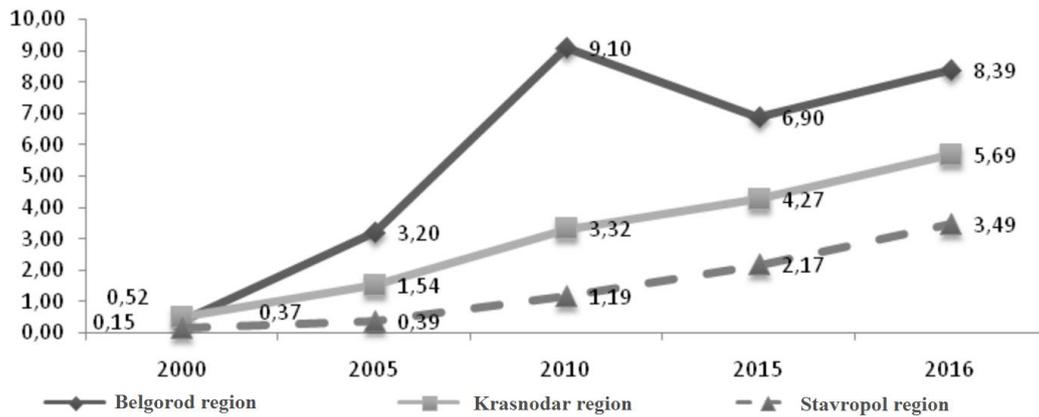


Figure 4: Investments in fixed capital per 1 hectare of agricultural land, thousand rubles.

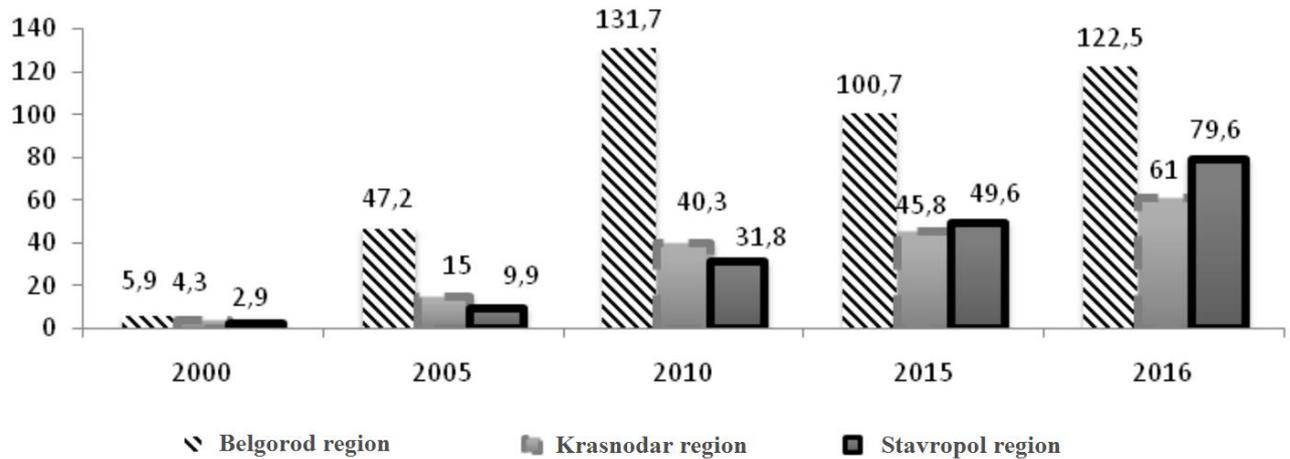


Figure 5: Investments in fixed capital per 1 employed in agriculture, thousand rubles.

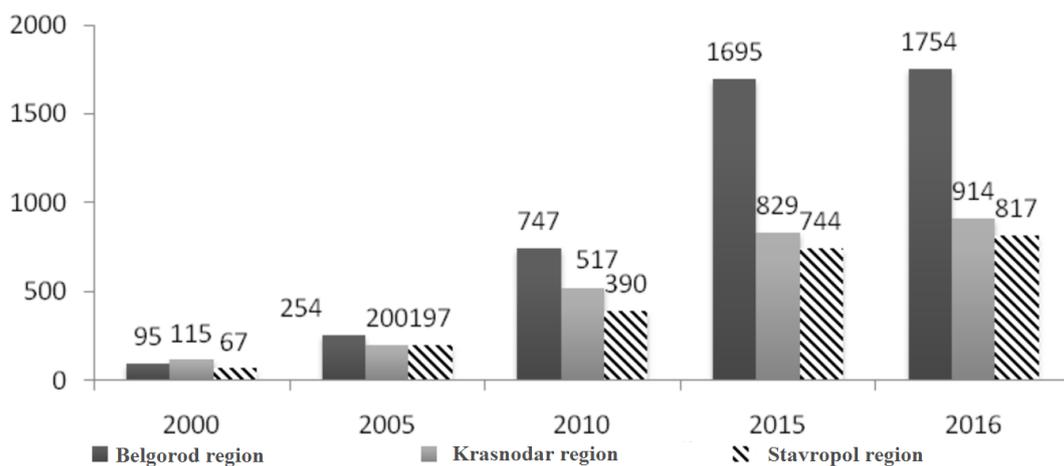


Figure 6: Labor productivity of one employed in agriculture, thousand rubles / person.

The amount of investment per 1 hectare of agricultural land in the Stavropol region is 2.4 times less than in the Belgorod region and 1.6 times less than in the Krasnodar region.

The result is a lag in labor productivity (Figure 6). The gross output per person employed in agriculture in the Belgorod region is 2 times higher than in the Stavropol region.

It is obvious that the allocation of additional budgetary resources to support investment lending would significantly expand the possibilities of agricultural producers in the implementation of investment projects. Currently, there is an unmet demand for borrowed funds with state support [6].

In the structure of bank lending to the agrarian sector of the economy of the Stavropol Territory in 2017, only 45% are concessional loans. Many agricultural producers are forced to attract borrowed funds at commercial rates significantly exceeding the preferential 5% per annum.

Of the total amount of preferential loans allocated to agricultural producers in 2017, 8.9 billion rubles. - short-term, necessary to meet the needs of farmers in additional financing of current activities. 23% of them accounted for small forms of management.

The amount of long-term concessional loans amounted to 17.6 billion rubles, 80.2% of this amount was directed to the development of the crop industry, only 19.5% to livestock, including 4.6% dairy cattle breeding, 0.3 % - investments in the processing of crop production. This structure of investment loans indicates the persistence of an imbalance in the development of the crop and livestock industries, as well as existing imbalances between the raw material base and the processing facilities of the Stavropol region.

This does not correspond to the strategic directions of development of the region both from the point of view of preserving soil fertility, improving the structure, stabilizing agricultural production, and from the standpoint of restoring and developing the livestock industry.

CONCLUSION

In this regard, it is advisable to introduce additional measures of state support for livestock, primarily dairy cattle. To increase the investment attractiveness of the industry, we offer:

- subsidizing loans and own investment funds aimed at building and equipping dairy farms and complexes that meet the requirements of modern production technologies - in the amount of 50%; for the modernization of existing production facilities - at a rate of 35%, as well as the purchase of modern forage harvesting equipment at a rate of 60% of the cost of domestically produced equipment and 40% of the cost of imported equipment;
- reimbursement of 20% of the cost of purchasing high-quality feed; feed additives; premixes; Milk replacer, providing balanced feeding of highly productive livestock, with a milk productivity of at least 5500 l of milk;
- subsidizing loans and own investment funds used for the purchase of breeding stock. The amounts of subsidies must be paid in two stages: 50% - on the basis of a contract for the purchase of breeding animals and 50% - in a year on the basis of documents confirming receipt of offspring from breeding cows.

The implementation of these measures will help ensure the accelerated development of the agro-industrial complex of the Stavropol region on the basis of diversification of agricultural production, increasing the productivity of basic sectors of agriculture and increasing the competitiveness of the industry.

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