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ВИЗНАЧЕННЯ ЗОВНІШНЬОЕКОНОМІЧНОГО ПОТЕНЦІАЛУ ВИНОРОБНОЇ ПРОМИСЛОВОСТІ УКРАЇНИ НА СВІТОВОМУ РИНКУ

Актуальність. *Експортна стратегія України 2017-2021 рр. визначає харчову промисловість однією із ключових елементів зовнішньоекономічного потенціалу країни. Незважаючи на другорядне значення продукції виноробства у задоволенні основних життєвих потреб людини, виноробна промисловість відіграє важливу роль у наповненні бюджету країни, забезпеченні соціально-економічного розвитку регіонів. Виноробна галузь є перспективним напрямком розвитку економіки України, складовою її зовнішньоекономічного потенціалу, що обумовлено сприятливими ґрунтово-кліматичними умовами і достатньою забезпеченістю трудовими та іншими ресурсами.*

Мета та завдання. *Метою статті є визначення зовнішньоекономічного потенціалу виноробної промисловості України на світовому ринку. Для реалізації визначеної мети було поставлено і вирішено такі завдання: визначення виробничого потенціалу виноробної промисловості України; оцінка споживчого потенціалу ринку вин України; вивчення тенденцій експортно-імпортної діяльності операторів ринку (обсягів експорту, імпорту, зовнішньоторговельного обороту, сальдо експортно-імпортних операцій, географічної структури експорту та імпорту).*

Результати. *За результатами проведеного дослідження функціонування виноробної промисловості України у 2014-2018 рр. встановлено, що виробничий потенціал українського ринку вина знижується. Це можна пояснити зменшенням площ виноградних насаджень у плодоносному віці, спадною динамікою індексу промислової продукції, зростанням ступеня зносу основних фондів, зниженням середньооблікової чисельності штатних працівників, а також зниженням споживчого потенціалу ринку (через зменшення чисельності цільового сегменту споживачів; зниження частки витрат населення на алкогольна напої та тютюнові вироби; зростання середніх споживчих цін на продукцію; заборону рекламування продукції виноробства тощо.)*

За показниками експортно-імпортної діяльності у грошовому вираженні Україна є нетто-імпортером виноградних вин. Проте у натуральному вираженні обсяги експорту виноробної продукції переважають над імпортом. Таку суперечливість даних у натуральних та грошових одиницях можна пояснити низькою вартістю українського експорту. Середня ціна 1 літра експортованого українського вина у 2018 році в 3,5 рази нижча за вартість 1 літра імпортного. Географічна структура попиту на українські вина змінюється протягом досліджуваного періоду: знижується частка країн СНД та Європи та зростає частка азійських країн. Найбільшими покупцями українського вина є Російська Федерація, Грузія, Азербайджан, Казахстан, Китай. Географія імпорту виноградних вин має протилежну структуру: значну зростаючу частку займають країни Європи, найменшу – «нові винні регіони»: Америка, Африка і Австралія та Океанія.

Висновки. *Аналіз показників функціонування виноробної промисловості України свідчить про те, що на даний час вона не може претендувати на позицію впливового гравця ринку. Наявний вагомий природно-кліматичний потенціал, проте є і низка проблем, які гальмують розвиток зовнішньоторговельного потенціалу. Серед них: проблеми, пов'язані з політико-правовим середовищем; проблеми виробничого потенціалу; проблеми споживчого потенціалу; зовнішньоторговельні проблеми; збутові проблеми.*

Ключові слова*: зовнішньоекономічний потенціал, експортно-імпортні операції, експорт, імпорт, виноробна промисловість, ринок вина.*

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DETERMINATION OF THE FOREIGN ECONOMIC POTENTIAL OF UKRAINIAN WINE INDUSTRY IN THE WORLD MARKET

Topicality. *Ukrainian export strategy for 2017-2021 determines food industry as one of the key elements of the country's foreign economic potential. Despite the secondary importance of wine in meeting the basic human needs, wine industry plays an important role in filling the budget of the country, ensuring the socio-economic development of regions. The wine sector is a perspective direction for the development of Ukrainian economy, an integral part of its foreign economic potential because of favourable natural and climatic conditions and existence of labour and other resources of high quality.*

Aim and tasks. *The purpose of the article is to determine the foreign economic potential of Ukrainian wine industry in the world market. To achieve the goal, following tasks have been set and solved: definition of production potential of Ukrainian wine industry; assessment of consumer potential of Ukrainian wine market; study of trends of export-import activity of market operators (volumes of export, import, foreign trade turnover, balance of export and import operations, geographic structure of export and import).*

Research results. *According to the research results of Ukrainian wine industry in 2014-2018, it is established that the production potential of Ukrainian wine market is decreasing. This can be explained by the decrease in the area of grape plantations in the fructiferous age, the declining dynamics of the index of industrial products, the growth of depreciation, the decrease in the average number of staff members, as well as the decline in consumer market potential (due to a decrease in the number of target consumer segment, in the share of spending on alcoholic beverages and tobacco products, the growth of average consumer prices, the prohibition of the promotion of wine etc.).*

According to the export-import activity in monetary terms Ukraine is a net importer of grape wines. However, in terms of volume, the volumes of wine exports are dominated by imports. Such contradictions in data in both physical and monetary terms can be explained by the low cost of Ukrainian exports. The average price of 1 litre of exported Ukrainian wine in 2018 is 3.5 times lower than the cost of 1 litre of imported one. The geographic structure of demand for Ukrainian wines varies: the share of CIS countries and Europe is decreasing and the share of Asian countries is increasing. The largest buyers of Ukrainian wine are: Russian Federation, Georgia, Azerbaijan, Kazakhstan, and China. The geography of the import of grape wines has the opposite structure: a significant proportion is being taken by the European countries, the smallest – by the "new wine regions": America, Africa and Australia and Oceania.

Conclusion. *The analysis of the indicators of functioning of Ukrainian wine industry shows that at present, it can not claim the position of an influential player in the market. There is a significant natural and climatic potential, but there is a number of problems that hinder the development of foreign economic potential. These problems are: problems related to the political and legal environment; problems of production potential; problems of consumer potential; foreign trade problems; retail problems.*

Keywords: *foreign economic potential, export-import operations, export, import, winemaking industry, wine market.*

Problem statement and its connection with important scientific and practical tasks. Competition is an integral part of a market economy and a powerful engine of economic development. Today, the globalization tendencies of the world economy and the openness of national commodity markets cause the intensification of competition on all levels: between states, their coalitions, regions, industries, enterprises and certain goods. Increase of competitive pressure on market actors necessitates a comprehensive analysis of their potential, the identification of problems of its formation and the need to find possible ways to strengthen their positions. The wine industry as part of the food complex is one of the prior components of the export potential of Ukraine within the framework of its modern export strategy.

Analysis of recent publications on the problem. The theoretical and practical aspects of foreign economic potential of the country in general and of the wine industry, in particular, are studied in the works of many economists, namely: Yakymchuk T.V., Volvach I.Yu. [1], Pliaskina A.I., Savchuk O.A. [2], Fomishina V.M. [3], Plyushik I.A., Ogorodnik R.P. [4] Yablonska N.V., Krupina S.V. [10] and others.

Allocation of previously unsolved parts of the general problem. The growing dynamism of domestic and foreign wine markets necessitate continuous monitoring of the main trends, the identification of existing problems, as well as the potential for the development and expansion of domestic producers in the world wine market.

Formulation of research objectives (problem statement). The aim of the study is to analyze the foreign economic potential of Ukrainian wine industry and identify problems and prospects for its integration into the world market.

An outline of the main results and their justification. There is no single interpretation of the term "foreign economic potential" in modern scientific literature. However, the majority of authors, in particular [1, 2; 3], understands it as a combination of production factors that provide an opportunity for an effective exit of an enterprise into the foreign market. Consequently, the study of foreign economic potential of Ukrainian wine market implies an assessment of its production potential, as well as consumer potential and key trends in the export and import activities of market operators (volumes of exports, imports, foreign trade turnover, balance of export-import operations, geographic structure of exports and imports, etc.) [4].

The dynamics of the production and consumer potential of Ukrainian wine market is presented in the table. 1

Table 1

The main indicators of production and consumer potential of Ukrainian wine market in 2013-2018, thsd. dal.

Year	Actual volume of domestic consumption (D_i)	Volume of domestic production (P_i)	Volume of import (I_i)	Volume of export (E_i)	Stocks (St_i) (+/-)	Market capacity ($MC=P_i+I_i-D_i-E_i \pm St_{i-1}$)
2014	8376,6	14289,8	2733,9	4541,0	+4103,1	5121,1
2015	7002,2	14519,4	2333,8	6123,4	+3727,6	3954,3
2016	7279,0	17151,3	4317,0	3150,6	+11038,7	14766,3
2017	6649,3	6668,5	3203,4	4198,4	-975,8	10062,9
2018	7032,2	6770,0	4048,14	4870,07	-1084,13	-2059,93

*constructed by the author according to the data [5].

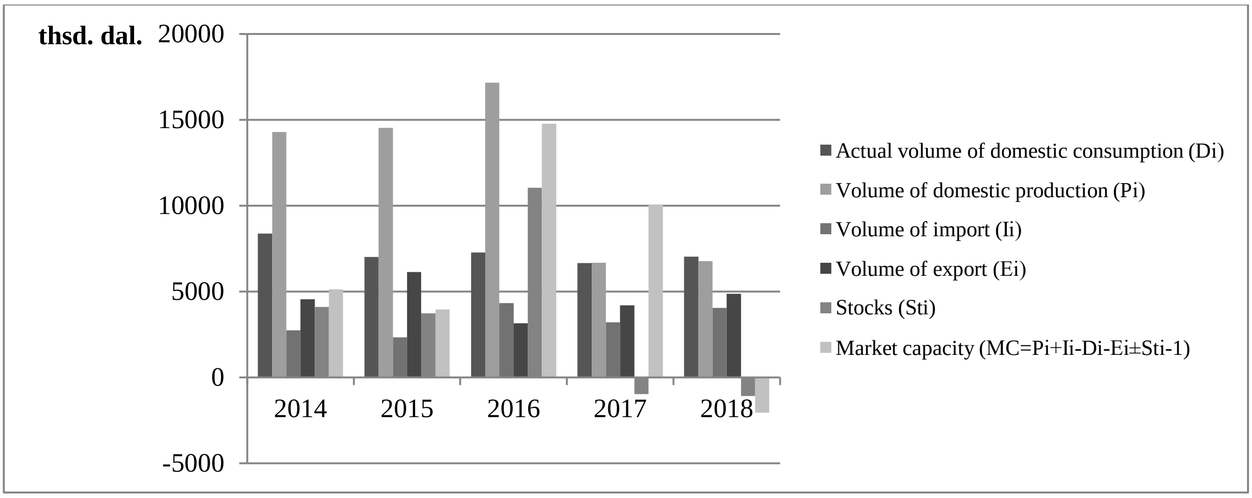


Fig. 1. Comparison of the dynamics of the main indicators of production and consumer potential of Ukrainian wine market in 2011-2018, thsd. dal.

*constructed by the author according to the data [5].

According to the State Statistics Service of Ukraine, the production potential of Ukrainian wine market is decreasing, in 2018 it is only 47,4% of the 2014 figure (excluding the Autonomous Republic of Crimea). The negative dynamics is explained by the decrease in the area of grape plantations in the fructiferous age, the declining dynamics of the index of industrial products, the growth of depreciation, the decrease in the average number of staff members, as well as the decline in consumer market potential (due to a decrease in the number of target consumer segment, in the share of spending on alcoholic beverages and tobacco products, the growth of average consumer prices, the prohibition of the promotion of wine etc.).

Decreasing in domestic production volumes leads to an increase in imports of wine into the country. According to experts, the share of sales of imported wines is 25-30% of the total volume of Ukrainian wine market [6]. However, as the result of calculations carried out according to [5], the share of imported wine is larger and ranges from 32,2% in 2014 to 37,0% in 2017 (table 2).

The dynamics of volumes of imported wine consumption in Ukraine has a steady increasing tendency. At the same time, the range of imported wines is constantly expanding in large retail chains, hotels, restaurants and cafes, and the assortment of Ukrainian wines in domestic shops, according to experts in 2018, declined by a quarter [7], indicating an increase in competitive pressure from imported goods .

Table 2

The structure of wine consumption in Ukraine in terms of: domestic wine and imported wine in 2014-2017*

Year	Total wine consumption, thsd. dal.	Volume of wine consumption			
		Volume of domestic wine consumption		Volume of imported wine consumption	
		thsd. dal.	%	thsd. dal.	%
2014	8376,6	5679,33	67,8	2697,27	32,2
2015	7002,2	4551,43	65,0	2450,77	35,0
2016	7279,0	4658,56	64,0	2620,44	36,0
2017	6649,3	4189,06	63,0	2460,24	37,0

*constructed by the author according to the data [5].

The main indicators of the dynamics of foreign trade in Ukrainian wine industry in 2014-2018 are presented in table 3.

Table 3

Indicators of export-import activity of Ukrainian wine industry in 2014-2018*

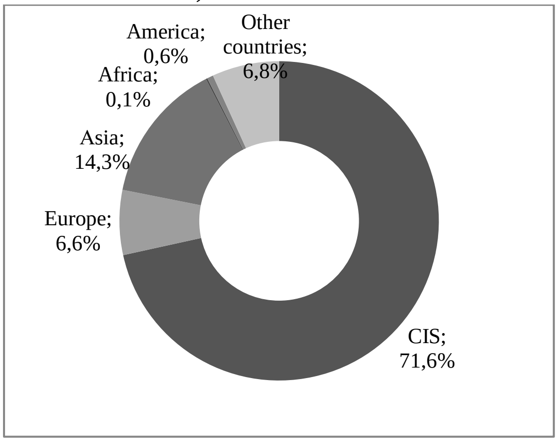
Indicators	Years					Change during the period 2018/2014	
	2014	2015	2016	2017	2018	Absolute growth (+/-)	Growth rate, %
Volume of export:							
MM USD	35,10	38,14	24,66	32,52	38,00	2,90	+8,26
thsd. dal.	4540,95	6123,39	3150,58	4198,34	4870,07	329,12	+7,25
Volume of import:							
MM USD	95,61	56,36	85,28	89,81	113,50	17,89	+18,71
thsd. dal.	2733,92	2333,81	4317,02	3203,40	4048,14	1314,22	+48,07
Foreign trade turnover:							
MM USD	130,71	94,50	109,94	122,33	151,50	20,79	+15,91
thsd. dal.	7274,87	8457,2	7467,6	7401,74	8918,21	1643,34	+22,59
Balance of export-import operations:							
MM USD	-60,51	-18,22	-60,62	-57,29	-75,50	14,99	+24,77
thsd. dal.	1807,03	3789,58	-1166,44	994,94	821,93	-985,1	-54,51

*constructed by the author according to the data [5; 8].

According to the table. 3 it can be concluded that Ukraine is a net importer of wine (the balance of export-import operations shows the predominance of import volumes over exports in monetary terms). However, in terms of volume, the volume of wine exports is dominated by imports (except 2016), although absolute surplus is negative for the investigated period (-985,1 thsd. dal.). The volume of wine import is increasing (an increase of $ 17,89 MM or 18,71 %). However, in the investigated period, the volume of wine export has grown by 8,26 % ($ 2,9 MM), that demonstrates the positive dynamics of the development of this market. Growth of the volume of foreign trade turnover by $ 20,79 MM (+15,91 % in 2018/2014) shows a tendency of the foreign economic activity intensification of wine market operators. This contradiction in data in both physical and monetary terms can be explained by the low cost of Ukrainian export. The average price of 1 litre of exported Ukrainian wine in 2018 is $ 0,78. The price for imported wine is $ 2,8/litre.

The geographical structure of demand for Ukrainian wine varies during the investigated period. The share of Ukrainian wine consumption by region is presented in Fig. 2

The political situation in Ukraine has affected the geography of the wine sales: the share of CIS countries is gradually decreasing from 71,6 % in 2014 to 59,0 % in 2018, in particular due to the restriction of the certain operations between Ukraine and the Russian Federation. Despite the European vector of political and economic development of Ukraine, the share of wine export to European countries declined from 6,6 % in 2014 to 1,4 % in 2018.

2.1) 

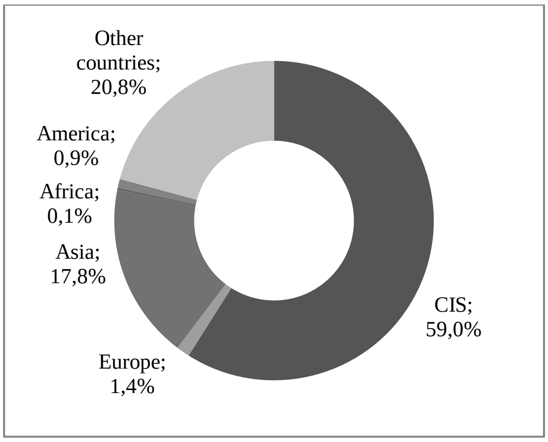
2.2) 

Fig. 2. Geographical structure of Ukrainian wine export in 2014 (2.1) and 2018 (2.2)*

*constructed by the author according to the data [5].

This can be partly explained by the saturation of the domestic European market with local trademarks, reduction of wine consumption in some European countries (France, Germany, Austria, Croatia, Denmark, Serbia, etc.) [9] and lack of consumer awareness about Ukrainian wines, absence of a competitive brand of Ukraine as wine country. The largest buyers of Ukrainian wine are: the Russian Federation, Georgia, Azerbaijan, Kazakhstan, and China.

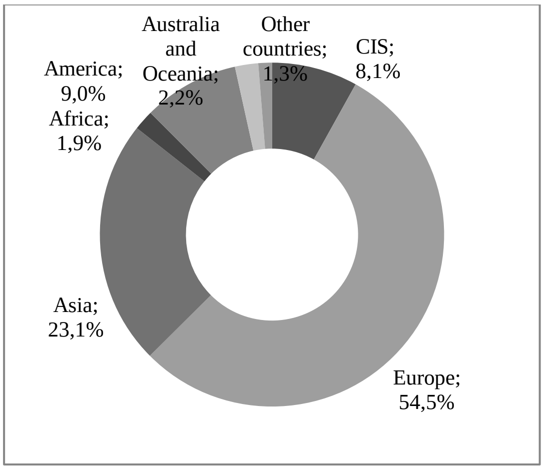
Growth in the export of wine occurred in the countries of American and Asian region from 0,6 % and 14,3 % in 2014 to 0,9 % and 17,8 % in 2018, respectively. A positive vector for the development of this trend is confirmed by the report of the International Organization of Vine and Wine (OIV) for 2018. According to data, presented in the report, the United States ranks first in terms of wine consumption in the world, and China is the fifth, wine consumption here has increased by 15% in 2017/2014.

The geography of wine import has the opposite structure: Europe has a significant growing share, while the “new wine regions”, such as America, Africa and Australia and Oceania, have the smallest ones (figure 3).

The largest importers of wine to Ukrainian market are the top three European countries (Italy, France and Germany), which are the world's largest wine exporters according to the OIV. The share of this region in the investigated period rises from 54,5 % to 62,6 % in 2018. Also, the share of imports from CIS countries (Armenia and Moldova) and Australia and Oceania (Australia and New Zealand, which also occupy a leading place among world wine exporters) are increasing from 8,1 % and 2,2 % in 2014 to 10,3 % and 3,3% in 2018, respectively.

Analysis of the indicators of Ukrainian wine industry (the volume of production is about 1% of the world's total and consumption of 3–5 litres per person versus 40 liters in European countries) suggests that at the present time it can not claim the position of an influential player in the market, although it has significant natural and climatic potential. Today, representatives of the profile association of winemakers in Ukraine see the prospects of the industry in creating the brand "Ukrainian wine" and promoting it in the world.

According to the investigation of the peculiarities of the current situation in the world wine market, the following conclusions can be made [9]:

3.1) 

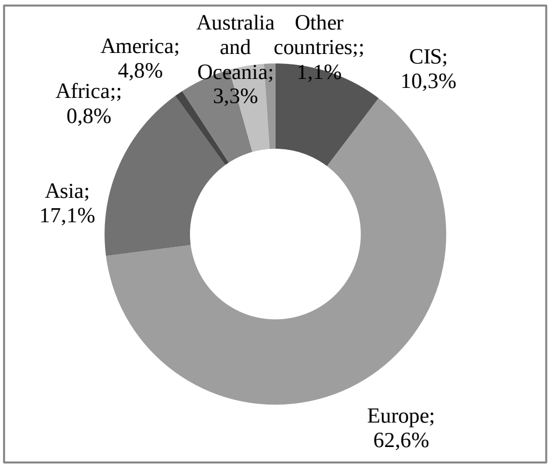
3.2) 

Fig. 3. Geographical structure of Ukrainian wine import in 2014 (3.1) and 2018 (3.2) *
*constructed by the author according to the data [5].

– natural and climatic conditions are the key factors in the cultivation of high quality grapes that can be used in the wine production. That is why the geographic location of the country is the determining factor that gives the country an international specialization as a wine country;

– all wine producing countries can be classified by three types: the “traditional” wine countries of the Old World (France, Spain, Italy, etc.), the countries of the New Wine World (Chile, South Africa, New Zealand, Australia), and those that are promising participants in the world wine market (China, Japan, Ukraine);

– the total wine production in 2018 has increased significantly and reached the high levels of 2004. The “traditional” wine countries (Italy, France and Spain) have the largest share in world wine production, but in recent years their volumes of production is decreasing, allowing new players to enter the market;

– the growth of wine consumption has been suspended in 2018. The geography of wine consumption is changing. Nations, that are traditionally accustomed to wine, gradually lose their taste, while those who are traditionally accustomed to other alcoholic beverages gradually acquire the taste of wine.

Conclusions and perspectives of further research. Ukraine has sufficient potential for the development of the industry and the production of quality products. But the wine industry has a significant number of problems that hinder its internal development and the formation of foreign economic potential. Modern problems of the wine industry can be categorized according to the following groups:

1. Problems, related to the political and legal environment in Ukraine: insufficient state financing, reduction of state subsidies, imperfection of the legal framework, irregularity of payment of state support for the establishment and supervision of young gardens, vineyards, berries, loss of territory of the Crimea.

However, producers in the continental part of Ukraine continue to grow dynamically, more and more craft producers are emerging with innovative technologies and ideas, proprietor's wines. Competition between manufacturers is intensifying, which contributes to the improvement of the quality of domestic products and the increase in the range [10].

With the separation of Crimean enterprises there was a change of leading manufacturers. According to the results of 2017 the following companies belong to the TOP-5: TOV “Trade House “Inkerman”, Open Joint-Stock Company “Alef-Vinal”, PJSC “Koblevo”, PJSC “Shabo”, PJSC “Odessavinprom” [11-13].

2. Problems of production potential, including reduction of vineyard areas (in particular, due to the loss of the Autonomous Republic Crimea and reduction of vineyards by 30%), aging of grape plantations, decrease of industrial production index, increase in the degree depreciation, decrease of average number of staff members, etc. The vine-growing sector is capital-intensive. It has the long payback period of investments in the full cycle of production (from vineyard cultivation to wine bottling). Investments in the laying of 1 hectare of vineyards by the time of the first harvest are 220 thousand UAH [14]. Vineyards give

the first harvest that can be used for making wine after 3-5 years from the time of their planting. And the total payback period of investments can reach 25-30 years [6].

3. Problems of consumer potential, including a low wine consumption culture, decrease in the number of target consumer segment, in the share of spending on alcoholic beverages and tobacco products, the growth of average consumer prices, the prohibition of the promotion of wine etc.

4. Foreign trade problems that include low consumers awareness about Ukrainian wine, the absence of the reputation of Ukraine as a wine country; the growth of volume of imported products with the reduction of domestic production, much lower export price of domestic products than imported to the territory of Ukraine.

5. Sales problems in the process of entering into the market. The newcomer has to fight for equal access to sales channels, perhaps even to create his own retail network – sellers and representatives of the HoReCa segment restraint upon trade of wines, which are yet unknown for consumers. Sustained connections among the enterprises and representatives of distribution networks require newcomers to "buy" access to sales channels through the concession of part of the profit in favour of distributors, as well as various means of stimulating sales to consumers. Therefore, income of the newcomer will not be high until wholesalers and retailers recognize the product and start promoting it. This especially concerns the producers of proprietor's wine whose consignments of goods are small and trademarks are not widely known to ordinary consumers [15].

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