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PROBLEMS AND ADAPTATION PROSPECTS IN FOREIGN ECONOMIC ACTIVITY OF THE AGRI-FOOD COMPLEX OF THE REPUBLIC OF BELARUS

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The analysis of foreign economic activity of the agri-food industry of Belarus over the past year is presented and proposals are developed to strengthen its adaptive capabilities.

Keywords: the Republic of Belarus, agri-food complex, foreign economic activity, adaptation.

ПРОБЛЕМЫ И ПЕРСПЕКТИВЫ АДАПТАЦИИ ВО ВНЕШНЕЭКОНОМИЧЕСКОЙ ДЕЯТЕЛЬНОСТИ АГРОПРОДОВОЛЬСТВЕННОГО КОМПЛЕКСА РЕСПУБЛИКИ БЕЛАРУСЬ

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Представлен анализ проблем на внешнеэкономическом направлении агропродовольственного комплекса Республики Беларусь за последний год и выявлены перспективы его адаптации к изменяющимся условиям внешней среды.

Ключевые слова: Республика Беларусь, агропродовольственный комплекс, внешнеэкономическое направление, адаптация.

In 2023, the external environment for the functioning of the economy of the Republic of Belarus has changed significantly under the influence of a whole system of foreign policy and foreign economic circumstances. Among them, as we noted earlier, the key ones are:

1. The ongoing sanctions pressure from the countries of the European Union, the United States of America, and some other countries against the economy of Belarus has continued since 2022. This especially applies to the export of timber products, petroleum products, and mineral fertilizers.

2. Closure of the Ukrainian market, which was significant for the Republic of Belarus. The country used to export goods worth about 5 billion US dollars to Ukraine.

3. The complication of monetary and financial settlements between business entities and the obvious decrease in trade volumes in euros, which is clearly evidenced by the change in the currency basket of the National Bank of the Republic of Belarus. Since December 12, 2022, the Russian ruble amounted to 60 %, the US dollar – 30 %, the yuan – 10 %, and the euro was completely excluded from the currency basket.

4. Radical changes in transport and logistics schemes for the implementation of export-import operations, in particular:

- almost complete closure of the southern logistics direction;
- a radical reduction in the northern logistics direction, including due to restrictions on rail transportation and on the use of the Klaipeda seaport in Lithuania;
- restrictions in the Western logistics direction, including in terms of transit opportunities in relation to sanctioned export and import goods of the Russian Federation.

The changed macroeconomic situation, in particular, the one noted above, affected the overall financial and economic results of the functioning of the national economy, but the prompt response to it by the government and the entire economic complex of the country neutralized this impact. According to the National Statistical Committee of the Republic of Belarus, the volume of gross domestic product in current prices amounted to 191.3 billion rubles in 2022, or in comparable prices 95.3 % of the level of 2021. However, at the same time, the achievement of a positive foreign trade balance, which amounted to 1.5 billion US dollars in the first half of 2022, and for the entire year exceeded 4.7 billion US dollars in equivalent, should be considered positive.

In the second half of 2023, the National Bank of the Republic of Belarus presented data on the country's foreign economic activity for the first six months of this year in comparison with the same period in 2022 [3]. Exports of goods for the specified period amounted to 19035.5 million US dollars compared to 16968.0 million US dollars last year. This means that an increase of 2067.5 million US dollars or plus 12.2 % was achieved. According to updated data from the National Bank, for 5 months the growth amounted to an even greater value of 13.4 %. Exports of goods excluding services monthly exceeded the figures for 2022, with the exception of January: 3027.7 million versus 3302.8 million. However, the balance of foreign trade in goods for the specified period turned out to be negative for all months, ranging from minus 153.4 million US dollars in January to minus 304.3 million US dollars in April. For the entire period, it amounted to minus 1233.4 million US dollars, although the same period in 2022 gave plus 257.0 million US dollars. At the same time, 5 months gave a smaller value: minus 1056.4 million US dollars.

As for the balance in goods and services, it turned out to be positive for all months of the current year, except for April (minus 63.5 million) and May (minus 13.9 million), reaching its maximum value in January: plus 81.1 million US dollars. Exports of goods and services for the period under review in 2023 amounted to 23,236.0 million US dollars. This significantly exceeded the 2022 figure: by 1839.9 million US dollars or 8.6 %.

Thus, we can conclude that in foreign economic activity the country, to a certain extent, managed to adapt to the current macroeconomic conditions.

Data from the National Statistical Committee of the Republic of Belarus suggests that the country's largest exports of goods were observed in March 2022. Among the main importers of domestic products, the Russian Federation was the undisputed leader, followed by Poland, Lithuania, China, Germany, and Kazakhstan.

The past calendar year has shown that, in significantly changed external environmental conditions, the agri-food industry of Belarus has demonstrated significantly greater opportunities for reorientation and adaptation in the field of foreign economic activity. The results of such adaptation turned out to be more successful and significant in comparison with many other sectors of the economy. This is evidenced by official data presented in February 2023 by the National Statistical Committee of the Republic of Belarus [2]. Exports of food products from Belarus in 2021 amounted to 5243.6 million US dollars, in 2022—6591.3 million US dollars at current prices, which ensured an increase of 25.7 %. At the same time, the share of food in the total volume of goods exports increased from 13.1 % to 17.2 %. At the same time, imports of food products from 3041.6 million US dollars increased to only 3146.7 million US dollars or increased by only 3.5 %. The share of food imports during this period increased by only 0.9 % (from 7.3 % in 21 to 8.2 % in 22). As a result, the positive balance increased from 2202.0 to 3444.6 million US dollars.

A comparison with the dynamics of non-food products shows the absolute advantage of the foreign economic adaptation capabilities of Belarusian food products. Export of non-

food products in 2021 is 4364.7 million US dollars, in 2022 – 4803.6 million, an increase of 10.1 %. The share of exports of non-food products in total exports in 2021 is 10.9 %, in 22 – 12.5 %. The foreign trade balance for non-food products is negative and has worsened compared to the previous year (in 21 – minus 1886.3 million US dollars; in 22 – minus 1934.1 million US dollars). As a result, we can state that if in 2021 the share of food products in the total volume of exports of goods from Belarus exceeded non-food products by only 2.2 % (13.1 % versus 10.9 %, respectively), then in 2022 the excess was more than 2 times greater – 4.7 % (17.2 and 12.5 %, respectively).

The opportunities for the foreign economic vector of development of the Belarusian agro-industrial complex have increased significantly as a result of a number of positive changes in domestic agricultural production. The agricultural sector of the Republic of Belarus, despite all the natural and climatic difficulties and problems of the external and internal environment, has demonstrated positive results. According to the National Statistical Committee for 2022 [2], the gross harvest of grain and leguminous crops amounted to 8,701 thousand tons or over 9.1 % of the 2021 level with a yield of 34.5 c/ha; sugar beets – 4227 thousand tons or over 9.1 % with a yield of 451 c/ha; potatoes – 3857 thousand tons or over 13.3 % with a yield of 223 c/ha; vegetables – 2861 thousand tons or over 5 % with a yield of 295 c/ha. The growth index of agricultural production in comparable prices as a percentage by 2021 for farms of all categories was 103.6; for agricultural organizations – 102.9. At the same time, all regions, except Gomel, exceeded this index for farms of all categories: Brest – 104.8; Vitebskaya – 101.5; Grodno – 106.9; Minsk – 104.1; Mogilevskaya – 102.0 (Gomel – 98.7). In terms of agricultural organizations, the Grodno region is again ahead – 106.6; then Brestskaya – 104.8; Minsk – 103.5; Mogilevskaya – 102.0. The list is closed by Vitebsk region – 99.9 and Gomel region – 95.5. As noted in the report of the Deputy Prime Minister of the Republic of Belarus at a joint meeting of the House of Representatives and the Council of the Republic on December 21, 2022, revenue from the sale of domestic agricultural products for ten months exceeded the corresponding period of the previous year by 23 %, and 316 agricultural enterprises or 25 % underwent financial recovery of their total number.

The analysis of foreign economic activity showed that for the dynamic and effective adaptation of the agri-food industry of Belarus to the current foreign economic conditions, in our opinion, it is necessary to:

1. Without deviating from the goals, objectives, and guidelines outlined in the Program of Socio-Economic Development of the Republic of Belarus for 2021–2025 [1] and the state program “Agricultural Business 2021–2025”, respond flexibly and quickly to changes in macroeconomic and microeconomic conditions of the external environment.

2. In the field of foreign economic activity, create more space for initiative and operational and economic independence of business entities in the agro-industrial complex, from producers of agricultural raw materials to manufacturers of food products, trade and purchasing, and foreign economic organizations.

3. If possible, while maintaining the achievements of past years in terms of diversifying supplies of agri-food products, focus attention and efforts on the Russian direction, since the share of such supplies has grown radically over the past year.

4. Actively fill the niches vacated as a result of sanctions restrictions in the assortment positions of agri-food products in the Russian Federation, as the main importer of our products, striving for absolutely equal economic conditions with Russian manufacturers and retailers.

5. Increase the dynamics in the creation and implementation of new types of brands, trademarks, samples of containers and packaging of agricultural and food products, com-

petitive with respect to Russian ones and not inferior to the level of Western companies that have left the market.

6. Making every effort to develop and improve the agri-food market of the Eurasian Economic Union, confidently occupy leading positions in the agro-industrial complex there.

7. Maintain and increase exports of agricultural raw materials and food to China and other countries in Asia and Latin America that did not support sanctions restrictions.

8. Remove unnecessary administrative and economic barriers to agri-food products in foreign trade, while preventing a weakening of the domestic market.

9. On the basis of improving the production, budgetary, financial, foreign economic, trade, and purchasing spheres, create conditions for stabilizing and improving the production and financial activities of agricultural organizations in Belarus.

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ИНВЕСТИЦИИ В СТРОИТЕЛЬСТВО

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Представлена информация о результатах инвестиционной деятельности в Республике Беларусь, структуре инвестиций в строительство, технологической структуре инвестиций в строительство.

Ключевые слова: инвестиции, строительство, инвестиционная деятельность, жилищное строительство, основной капитал.

INVESTMENTS IN CONSTRUCTION

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This report provides information on the results of investment activities in the Republic of Belarus; on the structure of investments in construction; on the technological structure of investments in construction.

Keywords: investments, construction, investment activity, housing construction, fixed capital.

Инвестиции в основной капитал – это затраты на приобретение, воспроизводство и создание новых основных средств [1].

В общем понимании инвестирование в строительство – это вложение свободных или заемных средств в процессы строительства жилых и нежилых помещений с целью получения прибыли от продажи объекта строительства или сдачи его в аренду. Объектом строительства может быть один дом или целый жилой квартал, гараж-