

## Possible export development scenario of agricultural products of Russia

### ВОЗМОЖНЫЙ СЦЕНАРИЙ РАЗВИТИЯ ЭКСПОРТА ПРОДУКЦИИ АПК РОССИИ

#### Posible escenario de desarrollo exportación de productos agricultura de Rusia

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#### Abstract

In modern conditions of constantly arising global economic risks, which sharply affect the development of world commodity markets, the role of developing its non-resource exports is increasingly becoming more visible in strengthening the economy of the Russian Federation. This study poses a question and proposes a scenario for improving the country's balance of payments based on increase in Russian food exports. The importance and necessity of solving this issue is reflected in the Message of the President of the Russian Federation of February 20, 2019 and his instructions to the Government of the country. In this regard, the purpose of the study was to consider and forecast possible scenarios for the implementation of approved plans for the development of agricultural exports. Achieving this goal several interrelated tasks had been solved: 1) identifying the ratio of export and import of agricultural products in the Russian Federation; 2) analysis the structure of export agricultural products; 3) forecasting the real possibilities of achieving the target indicators for the export of agricultural products, as well as the processing and food industries; 4) the proposal of options for improving the system of state regulation of agricultural exports or its elements. The result of the study was the confirmation of

#### Аннотация

В современных условиях постоянно возникающих глобальных экономических рисков, остро влияющих на развитие конъюнктуры мировых товарных рынков, для укрепления экономики Российской Федерации все отчетливее возрастает роль развития ее несырьевого экспорта. В данном исследовании поставлен вопрос и предложен сценарий улучшения платежного баланса страны на основе увеличения экспорта российского продовольствия. Важность и необходимость решения данного вопроса отражена в Послании Президента Российской Федерации от 20 февраля 2019 года и его поручениях Правительству страны. В этой связи целью исследования было рассмотрение, а также прогнозирование возможных сценариев реализации утвержденных планов по развитию экспорта продукции АПК. Достижение установленной цели было раскрыто путем решения нескольких взаимосвязанных задач: 1) выявление соотношения экспорта и импорта аграрной продукции в РФ; 2) анализ структуры экспорта продукции АПК; 3) прогнозирование реальных возможностей достижения целевых индикаторов по экспорту продукции отраслей сельского хозяйства, а также перерабатывающей и пищевой промышленности; 4) предложение вариантов совершенствования системы государственного

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hypothesis that state regulation of agricultural exports is, in general, effective.

**Keywords:** food products, Russian food exports, export structure, facts, forecasts, scenario for achieving targets.

регулирующего экспорта агропродовольствия или ее элементов. Результатом исследования явилось подтверждение гипотезы о том, что госрегулирование агроэкспорта носит, в целом, эффективный характер.

**Ключевые слова:** продовольственные товары, экспорт российского продовольствия, структура экспорта, факты, прогнозы, сценарий достижения целевых показателей.

## Resumen

En las condiciones actuales de riesgos económicos mundiales en constante aumento, que afectan gravemente el desarrollo de los mercados mundiales de productos básicos, el papel de desarrollar sus exportaciones no relacionadas con los recursos es cada vez más visible en el fortalecimiento de la economía de la Federación de Rusia. Este estudio plantea una pregunta y propone un escenario para mejorar la balanza de pagos del país basado en un aumento en las exportaciones rusas de alimentos. La importancia y la necesidad de resolver este problema se refleja en el Mensaje del Presidente de la Federación de Rusia del 20 de febrero de 2019 y sus instrucciones al Gobierno del país. En este sentido, el propósito del estudio fue considerar y pronosticar posibles escenarios para la implementación de planes aprobados para el desarrollo de exportaciones agrícolas. El logro de la meta establecida se reveló resolviendo varias tareas interrelacionadas: 1) identificar la proporción de exportación e importación de productos agrícolas en la Federación de Rusia; 2) análisis de la estructura de exportación de productos agrícolas; 3) pronosticar las posibilidades reales de alcanzar los indicadores objetivo para la exportación de productos agrícolas, así como las industrias de procesamiento y alimentos; 4) la propuesta de opciones para mejorar el sistema de regulación estatal de las exportaciones agrícolas o sus elementos. El resultado del estudio fue la confirmación de la hipótesis de que la regulación estatal de las exportaciones agrícolas es, en general, efectiva.

**Palabras claves:** regulación estatal de las exportaciones agrícolas, subsidios directos a la exportación, desarrollo de exportaciones agrícolas, aumento de las exportaciones de alimentos y materias primas agrícolas.

## Introduction

In 2014 the economy of the Russian Federation faced serious risks aimed at reducing the country's export-import operations, including the purchase of food and export of agricultural goods abroad. The one-sided interpretation of priority positions of the developed countries of the West - WTO members over the entities newly admitted to this organization, including Russia, did not allow it to get parity advantages. Researchers M. M. Galeev, A. S. Baleevsky, O. I. Katlishin, E. R. Urazaev note that the specifics of WTO accession provided for its official participants not only an increase in the import of agricultural raw materials and food, but also an expansion of possibility of increasing exports specified goods (Galeev, Baleevsky, Katlishin, Urazaev, 2014). In fact, as further practice has shown, after Russia's accession to the WTO, a possible increase in exports of agricultural products and food remained at the stage of forecast

expectations as opposed to an increase in imports.

Subsequently, a change in the political situation of our country in the international arena was expressed by the announcement of Russia by a number of developed countries of economic sanctions. These restrictive measures, against the backdrop of response of the Government of the Russian Federation, allowed the domestic agro-industrial complex to obtain the conditions for its intensive development. In our opinion, two very important conditions contributed to this situation. The first was the opening opportunity for domestic producers to enter the domestic food market. The second event is associated with increasing state budget support in development of the agricultural sector. The result of regulatory role of the state was not only the saturation of the Russian food market with products of its own

production, but also the possibility of exporting its surplus to other countries.

The effectiveness of state support in the form of budgetary incentives for agricultural exports can be based on solving the problem of reducing the cost of long-distance rail transport and promoting the creation of unified information marketing system. Taking into account the existing agricultural potential and its extrapolation cause cautious optimism regarding the achievement of export revenues of \$ 45 billion by domestic agro-industrial complex by 2024.

The relevance of the article is understandable and due to the highest manifestation of political will, at the scientific and methodological level of understanding of this issue, it is necessary to consider from two sides: firstly, the legitimacy and need to support exports in general (the authors propose to disclose this aspect in "Discussion" section), and secondly, the effectiveness of such support and the possibility of its improvement.

Based on the foregoing justification of the relevance of the chosen research topic, we set the following goal: to consider forecasting possible scenarios for implementation of approved plans for the development of export agricultural products. The goal requires the following interrelated tasks:

- 1) to analyze the ratio of exports and imports of agricultural products in the Russian Federation;
- 2) to analyze the structure of export agricultural products;
- 3) to evaluate (predict) the real possibilities of achieving the target indicators for export agricultural products, as well as the processing and food industries;
- 4) based on the results of the analysis, to formulate relevant conclusions and suggest possible options for improving the system of state regulation of agricultural food exports or its elements.

### Materials and methods

The methodological basis for solving the stated problems is methods of analysis and synthesis, balance method, abstract-logical method, sensory and monographic methods.

The scientific hypothesis of this article was the authors' assumption that state regulation of agricultural exports is effective.

The information base of the study was the open statistics of the Ministry of Agriculture and legal acts on the topic of the study.

The author's forecast version of achieving the plans set by the head of state is based on methodological assumptions prescribed by the executive authorities in Passport of the federal project "Export of agricultural products" (Passport of the federal project "Export of agricultural products", 2020).

Improving the efficiency of penetration of Russian farmers into international markets was indicated in the instructions of the President and the Government of the Russian Federation (List of instructions for implementation the Presidential Message to the Federal Assembly, 2020; On ensuring the fulfillment of Presidential instructions on the execution of the Presidential Message to the Federal Assembly of December 3, 2015, 2020). On this basis, a special section (priority project "Export of agricultural products") (State program for development of agriculture and regulation of agricultural products, raw materials and food. Markets for 2013–2020, 2020) has been introduced in the corresponding program for supporting commodity export of agro-industrial complex.

The position of state leadership to increase the country's export potential remains in the sphere of constant attention of the President of the Russian Federation. In his so-called "new May decrees" dated 07.05.2018 "Strategic directions for the development of Russia, including development of export of food products and other goods of agricultural production sector" (Decree of the President of the Russian Federation dated 05.07.2018, 2020), were identified the main directions of agricultural production development. By 2014, their implementation should be at least \$ 45 billion, compared to \$ 20.7 billion in 2018.

Given the uniqueness of the current situation in international food market, the role of commercial services of the Russian Federation, as never before in its recent history, is relevant. Based on this, in the fall of 2019, the Ministry of Agriculture of Russia announced a competition to develop a concept for export agricultural products development, food and beverages to Chinese market. The price for solving this issue is set at 20 million rubles, which confirms the importance of the task (the Ministry of Agriculture can spend 20 million rubles to create a concept for the development of exports to China, 2020).

## Results

To solve the first task, which is to identify the ratio of exports and imports of agricultural products of the agro-industrial complex, we examined the ratio of exports and imports of agricultural products. Due to the difficulty of determining the optimal ratio of export supplies to imports, taking into account food self-sufficiency, unplanned risks can interfere with the solution of such a large export task. However, the importance of Russia in world food trade is noted by foreign researchers. So, N. M. Binti Abdul Manap writes that the twenty largest food exporters, including Russia, account for 77% of

global exports and 59% of total imports (Binti Abdul Manap, 2020).

An analysis of the materials of the Russian Statistical Yearbook (Russian Statistical Yearbook, 2018) shows a trend of both agro-export growth and a gradual reduction in purchases of foreign food and other agricultural products, including grain seeds, sunflower seeds, other agricultural crops, veterinary preparations and medicines, certain types of agricultural machinery and technological lines etc. The ratio of exports and imports of agricultural products in the Russian Federation is shown in Table 1.

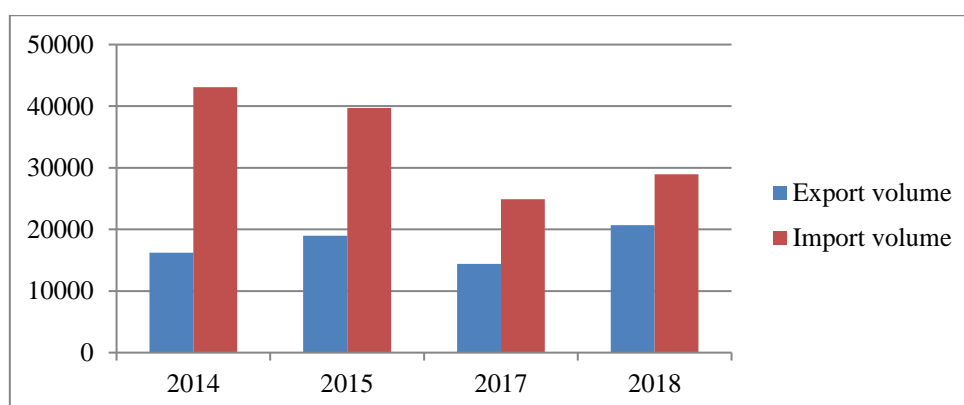
**Table 1.**

*The ratio of exports and imports of agricultural products in Russia, million dollars.*

Indicators	2016	2017	2018	2018 to 2016	
				+/-	%
Agri-food exports	18981	14423	20699	1718	109
Agri-food imports	39715	24902	28924	-10791	73
Food trade balance	-20734	-10479	-8225	12509	40
The ratio of import to export	2,1	1,7	1,4	-0,695	67

According to the data presented in Table 1, one can judge the increasing amount of income, starting in 2016, from food exports and the reduction in government spending associated with its import supplies. In the first case, by 2018, the growth was 9%. In the second, the reduction reached 27%. However, it should be noted that the absolute indicator of trade balance continues to remain negative. At the same time,

it underwent a significant change and, from 2016 to 2018, decreased by 60%, which is confirmed by indicators of the ratio of import to export. By 2018, it reached 1.4 versus 2.1 in 2016. Thus, the dynamics of export-import operations strive to reduce the negative trade balance of the country, associated with the prevalence of foreign trade transactions in foreign economic activity (Figure 1).



**Figure 1.** Comparative dynamics of Russian exports and imports of agricultural products, million dollars.

The graphic material of Figure 1, which reflects the dynamic series of results of foreign economic activity of agricultural sector of Russia, is, by now, evidence of gradual increase in its potential. In turn, the latter contributes not only an increase in food exports, but also reduction in import dependencet.

To solve the second task, namely the analysis of the structure of export agricultural products, we

analyzed the structure of export agricultural products. The analysis of the structure of agricultural export showed its wide range and variety (Figure 2). In general structure of exports, the main product groups are grain and products of milling and cereal industry, ready-to-eat products, fish and hydrobionts, products of oil and fat food industry, meat and meat products.

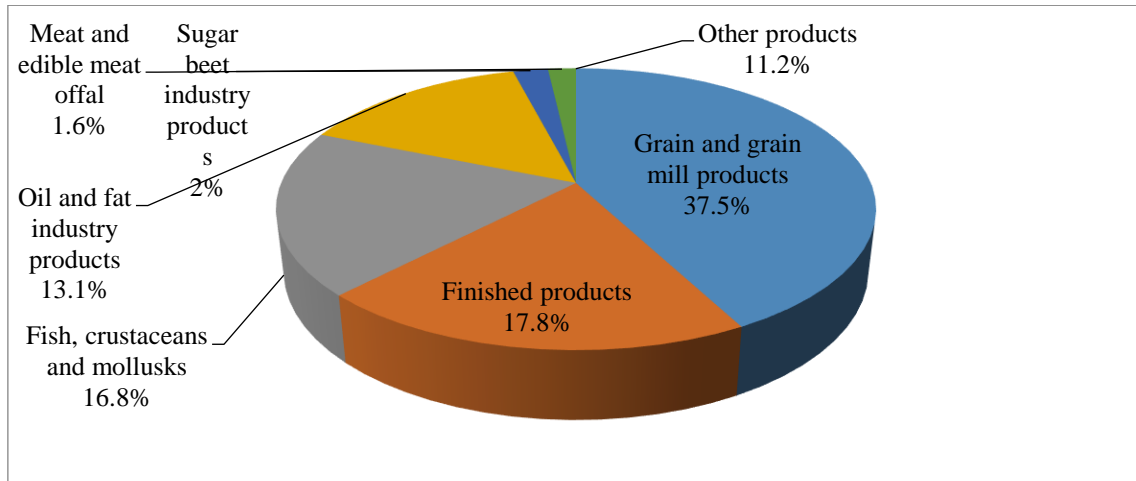


Figure 2. Export structure of agricultural products for 2018.

As can be seen from Figure 2, exported products as a whole do not have a high level of added value and manufacturability. About a third of exports are grain, which is essentially a commodity. A. S. Baleevskikh states that ready-to-eat food products with the highest added value, occupy less than one fifth of the total structure – 17.8% (Baleevskikh, 2018).

The country structure of food exports is not less interesting. The main buyers of Russian agricultural products are non-CIS countries. In 2018, export of Russian food products and agricultural raw materials in these countries has amounted to 76.7% – \$ 15.9 billion (Figure 3).

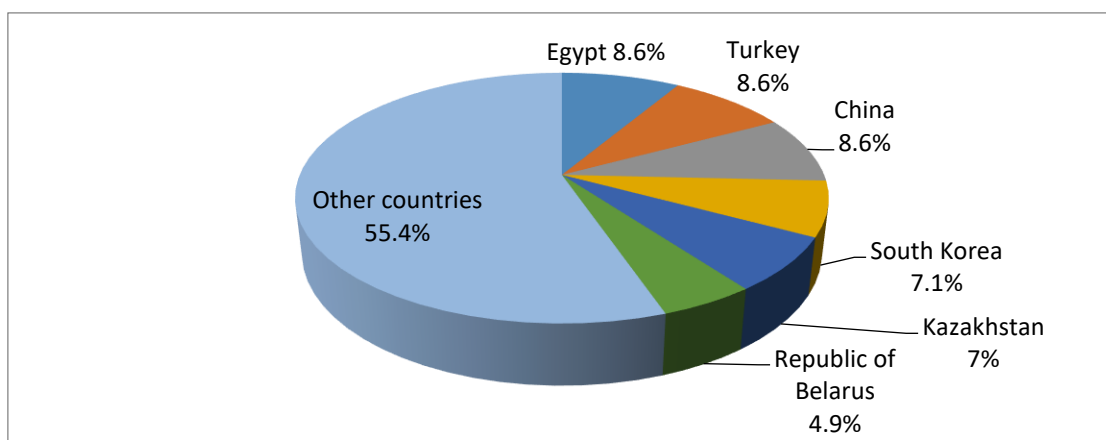


Figure 3. The structure of agricultural exports in the context of importing states.

As can be seen from the diagram shown in Figure 3, the leaders among all countries-importers of this enlarged group of goods in 2018 were Egypt, with export volume of 1.79 billion dollars, Turkey came second with 1.78 billion, and third is China (1.77 billion). The subsequent positions are in South Korea (1.46 billion), Kazakhstan (1.45 billion) and the Republic of Belarus (1.01 billion dollars) (Key indicators of agriculture in Russia in 2017, 2020).

In our opinion, the growth in the number of countries - importers of Russian food products is primarily associated with the quantitative growth of domestic agricultural products. The leading position here is grain. Since 2018, it has taken the third place in Russia among exported goods, yielding to energy carriers and metal rolling. K. Grudinin records the fact that 41.7 million tons of grain, including 34.0 million, were sold to countries such as Egypt, Turkey, Iran, Nigeria, Indonesia, Bangladesh, Lebanon and a number of others in 2019. t. wheat (Grudinin, 2019).

With significant agricultural potential, the Russian Federation must and should increase foreign contacts related to food exports. In our opinion, the leader of countries-importers of domestic agricultural products should be China. As a strategic partner of Russia, China needs a lot of food, including meat. The difficulties that have

arisen within the Chinese pork market are primarily due to the loss of a quarter of livestock as a result of African swine fever. The second reason is the growth of Chinese economy and, as a consequence, the increase in material well-being of population. The latter factor is closely correlated with the growth of consumer preferences of Chinese.

To solve the third task, which is represented in the form of forecasting the real possibilities of achieving the target indicators for the export of agricultural products, processing and food industries, we made a forecast of the real possibilities of achieving the target indicators for export of agricultural products. Given the current situation, Russian agricultural structures have all the conditions for production and sale abroad, including China, up to 400 thousand tons of pork meat in amount of 200 to 240 million dollars. It should be understood that in reality, the results may have different meanings. However, the extrapolation of export indicators of the past period on the basis of actual data of the present time, may contribute to development of forecast scenario for food exports from the Russian Federation. The forecast of food exports for the Russian Federation, taking into account the actual values of 2016–2019, is presented in Table 2.

**Table 2.** *The forecast of food exports for the Russian Federation, taking into account actual values of 2016–2019, billion dollars.*

Foodstuffs	Years							Actu-ally adopted average annual growth rate, %
	2016	2017	2018	2019	2020	2022	2024	
Grain and products of its processing:								
fact	5,95	5,86	7,76	10,5	-	-	-	22,1
forecast	-	-	-	-	12,8	19,05	28,4	-
Ready -to-eat foods:								
fact	3,1	3,21	3,68	3,9	-	-	-	8,1
forecast	-	-	-	-	4,2	4,86	5,67	-
Seafood and fish:								
fact	2,79	3,02	3,48	3,79	-	-	-	10,7
forecast	-	-	-	-	4,2	5,1	6,2	-
Oils and fats:								
fact	1,88	2,21	2,71	3,10	-	-	-	18,1
forecast	-	-	-	-	3,66	5,08	7,08	-
Beet sugar:								
fact	0,12	0,18	0,42	0,54	-	-	-	103,6
forecast	-	-	-	-	1,1	1,1	1,1	-

Foodstuffs	Years							Actu-ally adopted average annual growth rate, %
	2016	2017	2018	2019	2020	2022	2024	
Meat and meat products:								
fact	0,12	0,22	0,32	0,42	-	-	-	53,0
forecast	-	-	-	-	0,64	1,5	3,5	-
Other products:								
fact	2,31	2,4	2,34	2,38	-	-	-	1,0
forecast	-	-	-	-	2,4	2,44	2,49	-
Total:								
fact	16, 35	17,1	20,71	24,84	-	-	-	50,7
forecast	-	-	-	-	29,0	39,13	54,44	-

Calculations, the results of which are presented in Table 2, were made by us on the basis of average statistical data of actual indicators of food exports for 2016–2019. The extrapolation of average annual growth rate of their supplies abroad of the Russian Federation in the period from 2020–2024 inspires some optimism. The forecast of financial proceeds from exports, practically all goods of the food group, as shown by mathematical calculations, have a positive trend, with the exception of beet sugar. In this case, we took into account the fact of its significant production in Russia in 2019. According to analysts of sugar market, due to its overproduction, prices fell to the lowest levels. Domestic consumption in retail is sold at 26 thousand rubles per ton, or (at the average ruble exchange rate at the end of February – early March of 2020 – 62 rubles . for 1 dollar) 419.4 dollars. K. Gurdin considers it is important to focus on the fact that, given the situation on sugar market, a number of Russian manufacturers are forced to suspend its production, and the country's Ministry of Agriculture calls on to reduce the area of landings by 10-15% sugar beet producers in 2020 is (Gurdin, 2020). In this regard, preparing the forecast materials for 2022 and 2024, we considered it is necessary to leave the export revenue data obtained for 2020.

Thus, if we accept a certain scenario that is free from force majeure, then our optimism is based, first of all, on the activation of growth in production of entire range of agricultural products. This rise may be a significant factor in increasing the volume of export supplies of food from Russia.

The fourth task required the consideration of a number of projects to improve the system of state regulation of agricultural exports or its elements. In more detail, we presented the innovation projects of state control of the agricultural sub-sector of V. Morozov, A. S. Baleevsky.

V. Morozov considers the modernization of the system of state regulation of export of agri-food and its elements in the light of functioning of industrial institutes in agricultural sector. The measure of innovative regulation of agricultural exports, according to the researcher, is the investment program of 2001, as well as the creation of groups of multifunctional enterprises of regional and interregional significance, agricultural holdings. V. Morozov talks about the importance of the project, called the Doctrine of Food Security, 2010 (Decree of the President of the Russian Federation of January 30, 2010 N 120 “On Approving the Doctrine of Food Security of the Russian Federation”, 2020), due to which the number of administrative units (federal districts, regions, republics) has increased with full self-sufficiency in staple foods in 2016 compared to 2013 (Morozov, 2018).

Focusing on organizational and economic component of the state policy on modernization of agricultural food export regulation, the researcher notes that the first task is the development of agrology, that is, the network of wholesale distribution centers responsible for collecting, processing and storage, pre-sale preparation and implementation of a wide range of agricultural products . V. Morozov claims that the state needs to introduce sixty basic facilities in forty-eight constituent entities of the Russian

Federation, which would form a network of wholesale distribution centers (Ibid.).

A.S. Baleevskikh is inclined to ensure that the improvement of state regulation system of agricultural exports is carried out through the introduction of long-term state programs. So, according to the instructions of the President and the Chairman of the Government of the Russian Federation, the project "Export of agricultural products" was included in the State Agrarian Development Program (Baleevskikh, 2018). The researcher notes that the implementation of this

project has been carried out since 2017 as part of three main activities: 1. formation of a system for promoting agricultural exports abroad; 2. financing of veterinary and phytosanitary surveillance measures to expand access to food markets of other countries of domestic food commodities; 3. creation of special structure for the analysis of export agricultural products and the study of foreign markets. The dynamics of the volume and specific gravity of food exports in the total volume of export of goods of the Russian Federation is shown in Table 3.

**Table 3.**

*Dynamics of the volume and specific gravity of food exports in the total export of goods of the Russian Federation, mln. dollars, %.*

Name of product group	2013		2014	2015	2016	2017		2017/ 2013
	cost	% to total	cost	cost	cost	cost	% to total	
Total export	527266,4	100,0	497833,7	343542,8	283652,0	357766,5	100,0	67,9
Including food and agricultural raw materials	16227,5	3,1	18981,0	16209,3	17075,0	20699,0	5,8	127,6

An analysis of the dynamics of agricultural exports shows that the new methods of state regulation of exports were fruitful: the growth rate of food and agricultural raw materials sold abroad amounted to 27% by the pre-crisis 2013, and the share of this product group in total trade turnover has also increased (Table 3).

A. S. Baleevskikh states that the project for development of export potential of domestic agriculture has really existed since 2017. The researcher presents digital data on the analysis of the target criteria of the Export Development Program for 2017. An analysis of target criteria fulfillment of the Export Development Program is shown in Table 4.

**Table 4.**

*Analysis of target criteria fulfillment of the Export Development Program for 2017.*

Target indicator	Plan	Fact	Performance
The growth rate of food and agricultural exports, %	106	121,1	114%
The volume of exports of food and agricultural raw materials, billion dollars	17,9	20,7	116%
Organization of inspection visits by auditors of importing countries, frequency	5	24	480%

For increasing the growth of export revenue it is important not only the achievement of high gross results, but the sale of products redistribution of

agricultural raw materials. It is necessary to increase the volume of shipments abroad, along with grain, products of milling and cereal



industry. At present, foreign markets open for oil-fat, dairy, confectionery, fruit and vegetable products and several others. The Russian state emphasizes the importance of the goals and pursues an active support policy for agro-industrial complex.

### Discussion

As noted above, the question of developing a scenario for improving the country's balance of payments based on an increase in Russian food exports should be considered through the prism of a number of interrelated tasks:

1. identification of the ratio of exports and imports of agricultural products in the Russian Federation;
2. analysis of the structure of export of agricultural products;
3. forecasting the real possibilities of achieving the target indicators for export of agricultural products, as well as the processing and food industries;
4. the proposal of options for improving the system of state regulation of agricultural exports or its elements.

Due to the need to solve these problems, we will focus on scientific opinions on the following issues: 1) correlation of the export and import potential of the Russian Federation; 2) the structure of export of agricultural products; 3) real opportunities to achieve the target indicators for export of agricultural products, processing and food industries; 4) models of innovation in the system of state regulation of food exports and its elements.

The first group of researchers, such as V. Morozov, D. I. Valigursky, E. A. Arustamov, N. M. Binti Abdul Manap, raises the issue of the ratio of export and import of the Russian Federation.

According to V. Morozov, due to political events in Ukraine and Crimea, EU states led by the United States imposed multilateral sanctions against the Russian Federation (Morozov, 2018). However, according to the researcher, in the period 2016–2017, total imports as a whole exceeded the export of goods of the Russian Federation to 1.5 times (Ibid.). V. Morozov notes the fact that in 2017 the export of agricultural products has increased: the collection of sugar beets, oil seeds, open ground vegetables and greenhouse vegetables. In addition, it is stated that in 2017 production of livestock and poultry for slaughter has increased, which allowed the

domestic producer to develop exports for China and South Korea. Analyzing the flows of imported products in the period of 2017, the scientist indicates that it was observed among the supplies of potatoes (doubled), fresh fruits (+ 13%) and vegetables (+ 29%). Despite this, V. Morozov notes that 80% of domestic production was on domestic shelves. V. Morozov concludes that the total export of food products in 2017 increased by almost \$ 3 billion (from 17.1 in 2016 to 20 in 2017).

A number of researchers, such as N. M. Binti Abdul Manap, emphasizes the importance of Russia in world trade and considers it one of the largest exporters of food products (Binti Abdul Manap, 2020). Our calculations have shown that the country has not been able to align export and import volumes.

D. I. Valigursky, E. A. Arustamov are inclined to the position that Russia has the opportunity to become one of the most important market participants as an exporter of food. According to researchers, by 2025 it will be possible not only to fully import food products, but also to reach substantial export volumes for a number of products, such as grain, vegetable oil, sugar, pig and poultry meat, eggs (Valigursky, Arustamov, 2018).

The second group of researchers, such as V. Morozov, I. N. Buzdalov, V. Daskovsky, V. Kiselev analyze the structure of export agricultural products from the positive and negative sides.

V. Morozov believes that export of commodities, in contrast to export of hydrocarbons, doesn't aggravate the country's economic dependence, but, on the contrary, contributes to its food security. The point of view of V. Morozov is noteworthy, which is inclined to optimistically assess the level of export of agricultural products over the past 4 years. V. Morozov notes that in 2017, the export structure of agricultural products actively included grain, groats, flour (\$ 6.1 billion in 2017), fish and fish products - 18% (buyer countries China, Nigeria, South Korea), vegetable oils (13%) (Morozov, 2018).

Soviet researcher I. N. Buzdalov identifies negative trends in the development of export structure of agricultural products. In his opinion, the achievement of certain volumes of grain export was the result of ineffective agricultural policy that exacerbated the instability of the livestock feed base. I. N. Buzdalov emphasizes that the structural balance of production and

export of livestock products can serve as a guarantee of the country's economic stability. The researcher provides some statistics that confirm the fact of regressive agrarian policy of the Russian Federation: for the period 1990–2015, the share of livestock production fell from 65 to 47.7% (Buzdalov, 2017).

V. Daskovsky and V. Kiselev regard commodity exports as a mistake in economic policy. Scientists argue that the value of imported products does not pay off with income from the export of raw materials (Daskovsky, Kiselev, 2018).

The third group of scientific studies is devoted to the development of various forecast scenarios for development of exports of agricultural products, as well as processing and food industries. The question of forecasting the development of agricultural exports of the Russian Federation is represented by scientific opinions of A. S. Baleevskikh, D. Rylko, D. Khotko, O. I. Katlishin, Yu. Knobel, T. A. Flegontova, A. Petrikov, V. Morozov, I. Buzdalov.

From the point of view of domestic experts A. S. Baleevskikh, D. Rylko, D. Khotko, agricultural exports cannot be exposed to unplanned risks (Baleevskikh, 2018; Rylko, Khotko, 2020). A. S. Baleevskikh notes that Russia, as a significant international food market supplier, can move from 14th to 6th place among food suppliers when implementing forecasted indicators (Baleevskikh, 2018). According to the rating of existing world distribution of labor, this is a rather high level, given that the countries of the European Union, the USA, Brazil, China and Canada are ahead. At the same time, interest in the five world leaders is due to the fact that at the same time (with exception of Brazil) they are the largest importers of food.

D. Rylko, D. Khotko, O. I. Katlishin note the fact that, having 45% of the total world export of agricultural products in their assets, these five purchases for domestic needs account for up to 40% of all world food imports (Rylko, Khotko, 2020; Katlishin, 2016). A number of authors from the Center for Statistical Development, such as A. N. Spartak, A. Yu. Knobel, T. A. Flegontova, believe that Russian food exports should reach \$ 50 billion in 2024 (Spartak, Knobel, Flegontova, 2018).

More conservative forecasts are presented by A. Petrikov and V. Morozov. According to them, following the parameters of the priority project "Export of agricultural products", the planned

export volume in 2020 will amount to \$ 21.4 billion, and only \$ 30.0 billion in 2030 (Petrikov, 2017; Morozov, 2018). I. Buzdalov predicts a promising export potential of the country in amount of up to \$ 100 billion, subject to increased intensification of agriculture (Buzdalov, 2017).

Finally, the fourth group of scientists (V. Morozov, A. S. Baleevskikh, O. I. Katlishin, D. I. Valigurskikh, E. A. Arustamov) are aimed at developing projects to improve the system of state regulation of agricultural food exports or its elements.

From the point of view of V. Morozov, projects to improve state regulation of export of agricultural food and its elements should be carried out in two vectors: economic and social. As for the first, economic vector, it manifests itself in the implementation of the institutional framework in agricultural sector. According to V. Morozov, the introduction of institutional foundations in agricultural sector should be carried out at the expense of regulatory and investment support from regional budgets. According to the researcher, the main priority elements of innovative model for the growth of agribusiness competitiveness management should be: 1. structural modernization based on promising competitive advantages; 2. integration of effective mechanisms of state support; 3. formation of a competitive environment (Morozov, 2018).

A. S. Baleevskikh offers his own project to modernize state regulation of agricultural food exports, which consists of three dominant measures: 1. formation of a system for promoting agricultural exports abroad; 2. financing of veterinary and phytosanitary surveillance measures to expand access to food markets of other countries of domestic food commodities; 3. creation of special structure for the analysis of export agricultural products and the study of foreign markets (Baleevskikh, 2018).

No less interesting is the project on the development of state regulation of export agricultural food by O. I. Katlishin. According to the researcher, the stability of the state apparatus for the development of agri-food exports is based on a continuous search for effective management tools that ensure the successful adaptation of enterprises to changing market conditions. O. I. Katlishin focuses attention on foodstuffs that, in order to transform the state administration of agricultural products export, it is necessary to improve the management system of Russian food

companies and introduce a flexible high-tech food and processing industry management system throughout the Russian Federation (Katlishin, 2016).

D. I. Valigurskikh, E. A. Arustamov tend to consider the modernization state policy of regulating the export of agricultural food and its elements in the concept of import substitution. Researchers are of the opinion that the implementation of state support programs for agricultural producers should be carried out in a favorable investment climate, as well as in conditions of using innovative technologies. D. I. Valigurskikh and E. A. Arustamov note the importance of participation of scientific and analytical centers in all sub-sectors of agricultural production, the Russian Academy of Sciences, industrial research institutes and universities in formation an innovative effective system of state regulation of agricultural food exports and its components in the Russian Federation (Valigursky, Arustamov, 2018).

### Conclusions

1. Studies aimed at confirming the hypothesis that there are favorable conditions for development of agricultural production in the Russian Federation, starting in 2014, are confirmed in specific economic indicators. With the growth of the most important types of agricultural products, the country is increasing export food supplies. This was made possible thanks to the situation that arose in meeting the needs of citizens in domestic food market. A decrease of food supplies to Russia by import was noted by 2019.
2. At the same time, food imports to the country, despite all the measures applied by the state to support its producers and exporters, still exceed the volume of exports. The food export structure itself is far from perfect. Most of the exports are raw materials. Final food products account for only one fifth of the supply. Therefore, as part of work to improve exports, it is necessary to focus on the priority of selling ready-to-eat food abroad, spending minimal efforts on its preparation by the consumer.

Regarding international trade partnerships with Russia, countries such as China and India are the most perspective in terms of logistics and food sales volumes.

3. The fulfilled forecast of finance volumes from export to 2024, for all food commodity groups, showed a positive trend. Thus, our forecast was based on the activation of growth in production of entire range of agricultural products, which will be a decisive factor for increasing the volume of export deliveries of food from Russia.

Given the ever-increasing size of state financing for the development of agricultural production, it is possible with a certain degree of confidence to assume the possibility of export sales by 2024 in excess of \$ 50 billion.

4. The improvement of state system for regulating the export of agricultural food needs specific product groups. The products of milling and cereal industry should increase the volume of shipments abroad, along with grain. Today, foreign markets are open for confectionery, flavoring, butter-fat, dairy and fruit and vegetable products. The Russian Federation emphasizes the importance of innovative active policy in the field of agro-industrial complex.

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