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## Competitiveness in the Horticultural Market of Ukraine

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► **Abstract.** Competitiveness generally characterises the relative advantages in the market according to various quantitative and qualitative criteria and ultimately affects the development of its market conditions and the overall food supply of the population. Therefore, the study of competitiveness in the horticultural market in terms of production and sales volumes, prices, quality, and pomological varieties is quite important. The establishment of relative indicators of competitive advantages in the fruit and berry market determines favourable positions by various operators of economic relations. The purpose of the study consists in determining competitiveness in the fruit and berry market using relative indicators for comparing preferences in terms of the volume of the supply of fruits and berries by different categories of farms, prices, and pomological varieties. The research was guided by methodological approaches to determining the competitiveness of agricultural products in the Ukrainian agricultural market. At the same time, the following methods were used: dialectical method of cognition of market processes and a systematic approach, analytical generalisations, statistical comparison, constructive and computational, abstract and logical method. Based on comparative indicators of competitiveness of horticultural products in the Ukrainian market, the level of market competition of agricultural enterprises and households is estimated: the coefficient of market competition and the Herfindahl-Hirschman Index of market concentration. It is established that according to the first level of concentration of the industrial sector, the Ukrainian fruit market is in the low concentration group. Another indicator defined for households indicates a low concentration, high competition, a sufficient number of operators, and a weak position of each of them. In terms of fruit and berry production, Ukrainian producers are more competitive than importers. In terms of prices, agricultural producers and importers had competitive advantages. Competitive pomological varieties of fruits and berries for producers, traders, and consumers are determined based on calculations of competitive advantages and author's study of the trade and consumer sectors. The competitiveness of various categories of farms in the horticultural market, competitive advantages in terms of production volumes, prices, and pomological varieties of fruits and berries are determined from the standpoint of the need to rationally provide the needs of the population with high-quality food products and further market development. The findings should be used in the creation of a target programme for the development of the food market for a long-term period aimed primarily at the rational provision of food products competitive in price and quality to the population of Ukraine

► **Keywords:** horticultural products; production by category of farms; import supplies; consumer price; pomological variety

### ► Introduction

The state of development of the Ukrainian fruit and berry market is characterised, first of all, by the degree of satisfaction of the needs of the population with these products with appropriate quality and price availability. Market parameters of competitive advantages that characterise horticultural products are divided into those that relate to its consumer properties and those that determine its economic properties. The former, in turn, are divided into hard (parameters of compliance with international or national standards and regulations) and soft (aesthetic properties, design, colour, packaging). These

parameters are considered the key point in analysing the competitiveness of fruits and berries. Therefore, the study of competitiveness in the horticultural market in terms of production and sales volumes, prices, quality, and pomological varieties is quite important. After all, the areas of development of the fruit and berry market have been somewhat transformed – in addition to increasing the requirements for the supply and trade in products, there is a need to improve foreign trade relations. This is especially relevant considering the association between Ukraine and the European Union, due to the need to more actively

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introduce world standards of product quality and safety into production, when the issue of the country's export potential and its share in the world food market came to the fore.

Problems of production, consumption, and competitiveness in the Ukrainian food market were considered by V.T. Dudar and T.H. Dudar [1], N.Ye. Holomsha and O.Ya. Golomsha [2], O.Ya. Dzyadikovich and N.Ye. Holomsha [3], M.V. Misiuk [4], O.M. Yatsenko [5], et al. Theoretical and practical economic research in horticulture, which served as the basis for solving the problems of developing a competitive Ukrainian fruit and berry market, was carried out by O.Yu. Ermakov [6], L.O. Barabash [6], T.A. Markina [6], V.A. Ruliev [6], G.M. Satina [6], A.M. Shestopal [6] et al. I.V. Kolokolchikova was engaged in research on segmentation of the market of the horticultural products, determining the components and principles of this process [7]. Actual practical problems of horticultural market development, and monitoring the level of consumption of industry products were studied by Yu.V. Kernasiuk [8], T.P. Lozova [9], O.V. Nikishina [10] were engaged in the study of current trends and problems in the logistics development of the market of the horticultural products in Ukraine.

Mechanisms of influence of state financial support on the state and trends in the development of competitiveness of the horticultural industry in Ukraine have been thoroughly studied by L.M. Galat [11]. The study and systematisation of intensification factors and their impact on improving the competitiveness of horticultural enterprises was investigated by O.S. Tupchiiy [12]. Prospects of innovation and investment competitive development of the horticultural industry in the regions of Ukraine were explored by O.V. Cherevko, I.A. Franiv [13].

Competitiveness in the food market was also covered by R. Sergeev [14], A. Adukova [15], A. Redkva [16], K. Shatnenko [17], and the authors of this study [18]. However, certain aspects of competitiveness in the Ukrainian horticultural market, both in general and in the context of crops, require additional, more thorough investigation. *The purpose of the study* – monitoring and diagnostics of the level of competitiveness in the market of fruit and berry products by means of relative indicators comparing advantages in terms of production volumes by agricultural enterprises and household farms, prices, and pomological varieties.

### ► Materials and Methods

In the course of the research, the following methods were used: dialectical method of cognition of market processes and a systematic approach (to investigate the problems that arise in the production, establishment of product supply, and sale of products); analytical generalisations, statistical comparison, calculation (for generalisation, analysis and evaluation of market indicators), tabular (to illustrate research results), abstract and logical method (for conclusions).

The research is based on methodological approaches to determining the competitiveness of

agricultural products in the Ukrainian agricultural market. The market concentration index, four-part concentration index, Herfindahl index, Herfindahl-Hirschman index, Rosenbluth index, Hall-Tyldman index, and relative concentration ratio are the most commonly used to investigate the competitive situation in the fruit market. The use of these indicators allows assessing the distribution of market shares between competitors and determining the intensity of competition, the degree of monopolisation, and the degree of concentration of the product market under study.

The market competition coefficient (GR) and the Herfindel-Hirschman Index ( $HH_i$ ) [4, p. 100] (1; 2) have been applied and adapted to the specifics of the fruit and berry market in order to achieve the research objective.

$$GR = \frac{\sum_{i=1}^n V_i}{V_m} * 100\% \quad (1)$$

where  $V_i$  – volumes of fruit supplies by individual  $i$ -th commodity producer;  $V_m$  – total volume of fruits sold on the market (market capacity);  $n$  – the number of producers operating within the fruit market.

$$HH_i = \sum_{i=1}^n D_i^2 \quad (2)$$

where  $D_i$  – share of the business entity in the fruit market;  $n$  – the number of entities engaged in trading activities within the fruit market.

The first indicator characterises the share of an individual producer operating within the fruit market in the total volume of their sales (market capacity). The latter shows the level of concentration in the market of a particular commodity producer.

A market share is a traditional tool that can be used to assess the effectiveness of a horticultural producer, and to predict further prospects for its development. This indicator clearly interprets its rating place in the corresponding market segment relative to its competitors. It is established that a quantitative reflection of market share can be obtained by calculating the percentage ratio of sales volume to total sales indicators of products belonging to the same group. The market share reflects how effective the company's marketing activities are. The share of a particular producer can be calculated not only for the market, but also for a particular segment.

In the course of the study, a differentiated methodological mechanism for monitoring and diagnosing the competitiveness of industrial horticultural producers is proposed by calculating and analysing market competition coefficients, and for households – using the Herfindahl-Hirschman Index of market concentration.

In turn, the tools allow for the determination of relative indicators that diagnose the level of competition in the horticultural market, without having precise data for each small producer. At the same time the accuracy and correctness of the coefficient calculations are not lost.

## ► Results and Discussion

It is important to use relative indicators when assessing the competitiveness of agricultural products. They are also used to establish cross-industry competitiveness. Foreign researchers recommend assessing the competitiveness of agricultural products at the micro and macro levels: products, enterprises, industries, and nationwide [19-21]. Of particular importance in determining competitiveness in the Ukrainian market of fruits and berries is the establishment of competitive advantages of commodity producers in terms of production and sales volumes.

In recent years, researchers investigated the development of the Ukrainian and global market of horticultural products, pricing, insurance, lending, the development of Ukrainian horticulture based on greening and resource conservation, horticultural

production on an innovative basis, made a forecast of market conditions considering WTO requirements, etc. However, the tools for assessing market competitiveness by relative parameters proposed by the authors are carried out for the first time from the standpoint of adaptation to modern economic conditions of the horticultural market operation.

By GR and  $HH_1$  indicators the Ukrainian fruit market can be classified into one of three types: highly concentrated ( $70\% < GR < 100\%$ ;  $2,000 < HH_1 < 10,000$ ), moderately concentrated ( $45\% < GR < 70\%$ ;  $1,000 < HH_1 < 2,000$ ), and low-concentrated ( $GR < 45\%$ ;  $HH_1 < 1,000$ ) [1, p. 101; 4].

GR is used to characterise the level of competitive advantages of the industrial sector in the Ukrainian horticultural market, and households can use  $HH_1$  (Table 1).

**Table 1.** Indicators of market competition of all categories of farms on the Ukrainian horticultural market

Products	Years				
	2016	2017	2018	2019	2020
GR coefficients for the industrial sector					
Fruits incl.	27.3	23.2	31.7	22.2	22.4
Pome fruits	53.8	44.5	65.4	45.5	53.6
Stone fruits	21.1	11.1	21.3	18.7	16.4
$HH_1$ indicators for households					
Fruits incl.	660	759	700	668	775
Pome fruits	1,545	1,693	1,811	1,704	2,685
Stone fruits	3,534	1,563	2,855	4,299	3,741

**Source:** calculated based on the authors' research and data from the State Statistics Service of Ukraine [22]

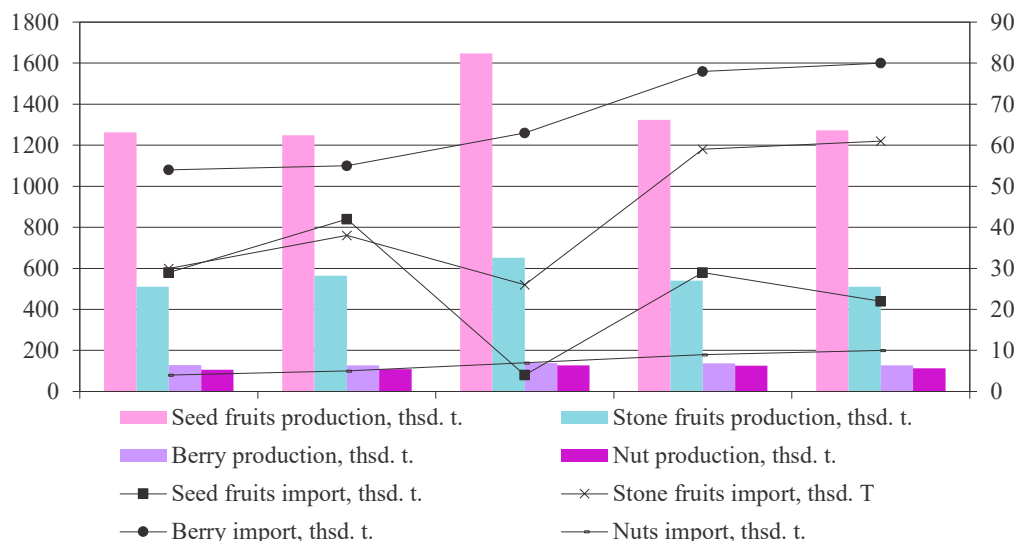
The main producers of fruits and berries in Ukraine are private households – 83-85%. Among agricultural enterprises, the bulk of fruits and berries are grown and sold by non-state-owned farms. Thus, the production of private farms is expanding – in 2020, the volumes amounted to 90.8 thousand tonnes, or 27% of the gross profit of the industrial sector [22].

The GR coefficient during 2016-2020 in general for fruits and, in particular, for stone fruits did not exceed 45% – it was 22.2-31.7% and 11.1-21.3%, respectively. Therefore, according to the level of concentration of the industrial sector, the Ukrainian fruit market should be attributed to the last group – low-concentrated markets. The best situation is observed for the pome crops. The GR coefficient is 44.5-53.8%, which indicates a moderate concentration of this area of activity of agricultural enterprises. Among other fruits, most of all pome fruits are produced in Ukraine – up to 70% (1.3 million tonnes).

Herfindahl-Hirschmann Index ( $HH_1$ ) of market concentration for all types of fruits less than 1,000 – 660-775, which indicates a low concentration and

high competition in the Ukrainian fruit market, the presence of a sufficient number of economic entities and the relatively weak position of some of them. For fruits of pome crops, this indicator during 2016-2019 was close to 2,000 – it was 1,545-1,811, which causes an increased level of concentration with the possibility of switching to high. In 2020, it exceeded 2,000 by 685 units, which allows classifying the Ukrainian market of pome fruits as “highly concentrated” in terms of the availability of suppliers – private farms. The market for stone fruit crops, with the exception of 2017, was highly concentrated. Thus, private farms, among other categories of farms in Ukraine, are the main producers of pome and stone fruits – in 2020, 76% (9.6 million tonnes) and 97% (0.7 million tonnes), respectively.

In the horticultural market, Ukrainian producers are more competitive in terms of production volumes compared to importers (Fig. 1). On average, in 2016-2020, the country produced 53 times more pome fruits (1,351 thousand tonnes), 13 times more stone fruits (555 thousand tons), 2 times more berries (131 thousand tonnes) and 17 times more nuts (116 thousand tonnes) compared to imported fruits [22].



**Figure 1.** Dynamics of Ukrainian production and imports of fruits and berries, thousand tonnes

**Source:** compiled according to the data from the State Statistics Service of Ukraine [22]

To fully assess the economic parameters of the competitiveness of fruit products, it is also worth comparing the sales prices of suppliers to the Ukrainian market – agricultural enterprises, private farms, and

importers, for example, for apples (Table 2). Ultimately, their production volume is 55% or 1,114.6 thousand tonnes (in 2020) of the total production of horticultural crops in the country [22].

**Table 2.** Average consumer sales prices of apples in Ukraine, UAH/kg

Indicators	2016	2017	Years 2018	2019	2020	2020 in % to 2016
Sales price of agricultural enterprises	12.00	16.50	16.00	13.50	22.50	187.5
Sells price by households	15.00	18.00	18.00	15.00	25.00	166.7
Price of imported apples	12.85	11.80	26.40	13.30	22.45	174.7

**Source:** calculated based on the authors' research and data from the State Statistics Service of Ukraine [22; 23]

Annual average consumer sales prices by agricultural enterprises in 2016-2020 amounted to 12.00-22.50 UAH/kg, which is 1.1-1.3 times less than the prices of households. The importer prices (with the exception of 2018) did not differ significantly. In 2019-2020, agricultural enterprises and importers had competitive advantages in terms of prices. This was conditioned by the fact that each individual subsidiary farm has a small mass of apples for sale, and therefore, can sell them in the same period as agricultural enterprises or importers and at higher prices. In addition, a psychological factor is triggered – consumers mostly believe that fruit cultivation by the population is organic, and therefore, cannot harm their health, which is why they are willing to buy products sometimes at much higher prices.

There is competition between producers for an advantage in price and quality, and the task is put at the forefront – to reduce the cost of production and marketing of horticultural products and at the same time improve their quality. The commercial quality of fruits and berries depends not only on the level of consumption, but also on varietal characteristics, meteorological conditions, areas and growing conditions, on appropriate preliminary preparation – sorting by quantity, size, packaging, etc. As a rule, commercial quality is determined by external signs:

size, colour, shape, degree of damage by diseases or mechanical devices [6].

The formation of yield, quality, and shelf life of horticultural products, in addition to the human factor, is significantly influenced by weather and climatic conditions. Thus, more than 60% of the risks that affect the productivity of perennial plantings are caused by the latter, which are closely related to global warming. Thus, in Ukraine, crop losses from adverse weather conditions, in some years, can reach 45-50%, and when they are combined, 70% or more [24, p. 67]. Most often, cases of loss of horticultural crops occur due to frost and drought.

In circumstances where there are a significant number of producers and intermediaries in the Ukrainian horticultural market, which leads to price competition between them, it is important to focus on the development of consumer demand. One of its features is the consumer's preference for a particular pomological variety. This has a direct impact on the price. For example, according to the author's observations of the price situation on the Demiyvskyi market in Kyiv in 2020, apples of the winter Ligol variety were almost 40% more expensive than the Djonared variety and 6% more expensive than Florina [25]. The monitoring of pomological varieties of horticultural crops was also carried out in the previous

2004-2013 years. There was a significant differentiation of prices for different types of fruits and vegetables depending on the variety, primarily due to consumer preferences, taste, appearance, shelf life, transportability, supply volumes, etc. [26]. The price level for a particular variety is largely determined by the stage of its life cycle. Newer, more advanced varieties tend to have a higher market value, and conversely, older varieties are inferior to them in the market over time. As with any product, the life cycle of pomological varieties of fruits and berries consists of the following stages: the development of the variety, its introduction into commodity production, stabilisation of production volumes, reduction of use and displacement of the variety from the market. The effectiveness of horticultural market operators is largely determined by the ability to correctly and quickly respond to consumer requests regarding the pomological characteristics of the product.

Regular determination of the rating table of pomological varieties to compare their competitiveness should be carried out at the following stages:

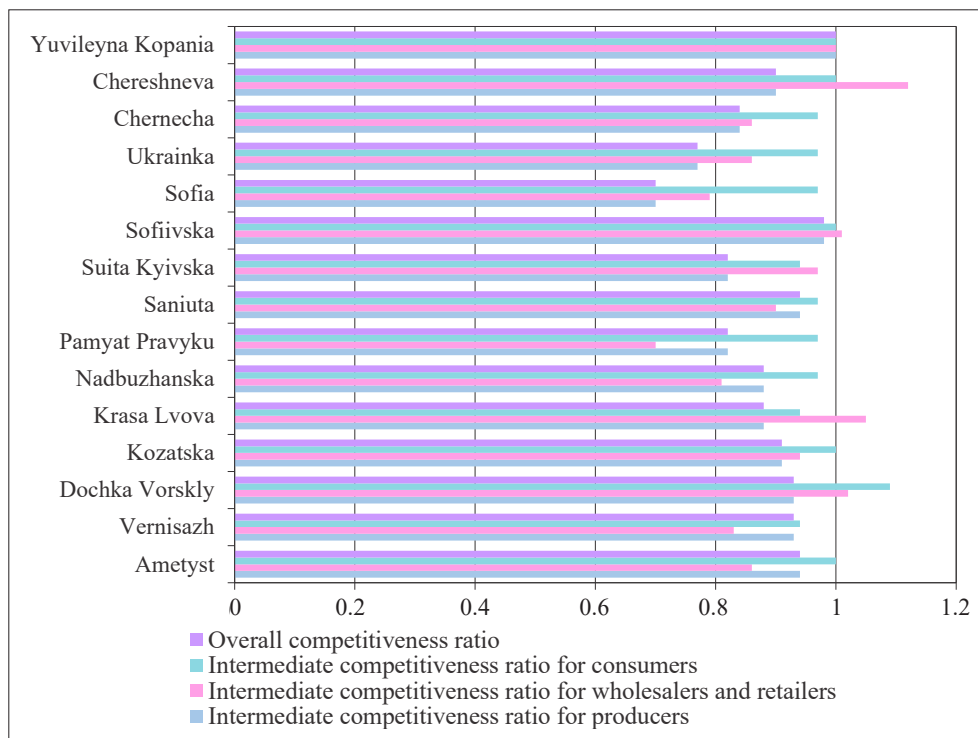
1. Identification of the main criteria of commodity quality for individual market entities (manufacturers, wholesalers, consumers).
2. Evaluation of quality indicators of pomological varieties in points.
3. Calculation of intermediate competitiveness coefficients (for individual market operators) and the general one.
4. Determination of the most competitive pomological varieties according to the scale: coefficient above 0.5 – competitiveness is satisfactory; close to

1.0 – good; above 1.0 – excellent). For certain varieties of fruit and berry crops, the composition of assessment indicators differs due to their biological and technological features. For example, for black currants, the length of the bunch and the number of berries in it are important at the first stage; for raspberries, the adhesion to the fruit, resistance to rotting, the shape of the berry, etc. However, the most important among the indicators is considered to be yield.

At the second stage of calculating the competitiveness of varieties, in accordance with previously substantiated criteria, quality indicators obtained based on the results of variety testing are selected. The latter are characterised by a nine-point rating system.

At the third stage, the intermediate and general coefficients of competitiveness of the variety are calculated. They are a comparative assessment of the pomological qualities and market values of the variety in relation to the indicators of the control variety.

Using a step-by-step algorithm, it was found that the most competitive for the producer, trader, and consumer are strawberry varieties: Olvia, Prysviata, Ret Gontlet; black currant: Dochka Vorskly, Sofiiivska, Chereshneva; remontant raspberry varieties: Polka, Herakl, Porana rosa, and among the early-late ripening period: Patricia, Persey. As an example, the indicators of competitiveness of pomological varieties in the black currant market are given (Fig. 2). The assessment was carried out for 15 varieties of Ukrainian selection. They were compared with the control variety Yuvileyna Kopania.



**Figure 2.** Competitiveness of pomological varieties on the Ukrainian black currant market

**Source:** calculated based on the results of research

According to a preliminary investigation, it was established that in Ukraine, competitive advantages are provided by the population, first of all, by products of Ukrainian origin [26]. Consumers often experiment when choosing pomological varieties. Among the summer varieties of apples, Papirovka and Melba had competitive advantages, autumn – Slava Peremozhstsiam, Antonovka, Mackintosh, Spartan, winter – Golden Delicious, Renet Simirenko (light colours), Idared, Champion, Gorets, Ligol, Richard. Among the pears, the most popular are Uliublana Klappa, Bere Kyivska, Parizhanka, apricot – Krasnoschokyi, black cherry– Prysadybna, Nizhnist, Valeryi Chkalov, cherry – Turgenivska, Podbelskaya, plum – Stenley, Uhorka, Renklod Altana.

In general, it is noted that for consumers of fruits and berries, when making a purchase, the main criteria for choosing a pomological variety are appearance and organoleptic indicators, in particular, taste [26].

Therefore, all the quality criteria of pomological varieties are important for the producer. Assessment of their competitiveness should be carried out by individual regions of the country, considering environmental and natural features.

### ► Conclusions

According to the level of competitive advantages and concentration of all categories of farms, the fruit market of Ukraine is classified as low-concentrated. In terms of prices, Ukrainian fruits, in comparison with imported ones, turned out to be more competitive. Ukrainian producers occupy dominant positions in

the formation of the overall supply. It is determined that horticultural crops produced in Ukraine are in greater demand by consumers than imported ones. After all, they are marked by a lower content of chemical residues and are not inferior in organoleptic parameters. Therefore, there is reason to believe that in the national market, horticultural products will not lose their competitive position in terms of quality. Based on the study and step-by-step determination of the rating of pomological varieties, intermediate and general indicators of competitiveness, their competitive advantages for all operators of the horticultural market are established. The level of fruit and berry production by households occupies the main share, and their level of productivity is significantly ahead of industrial enterprises, which already indicates the significant potential of this category of farms in the future. It is worth noting that such development takes place almost without any significant state support, attracting additional labour resources or any special incentives.

However, to fully meet the needs of consumers with fruits and berries throughout the year, there is a need for appropriate legislative regulation on the creation of service cooperatives that would carry out wholesale purchases of products from the population during mass fruiting and, by agreement, continue to sell them through a wholesale or retail network. This would allow legalising the flow of fruits and berries, control their entry into the market of appropriate quality, introduce sorting and packaging, contribute to transparent price formation, and increase household incomes.

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## Конкурентоспроможність на плодоягідному ринку України

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► **Анотація.** Конкурентоспроможність в загальному характеризує відносні переваги на ринку за різними кількісними та якісними критеріями і в кінцевому підсумку впливає на формування його кон'юнктури та в цілому продовольчого забезпечення населення. Відтак дослідження конкурентоспроможності на плодоягідному ринку за обсягами виробництва і реалізації, цінами, якістю та помологічними сортами є досить важливими. Встановлення відносних показників, що показують конкурентні переваги на ринку плодів і ягід, уможливають визначення вигідних позицій різними операторами економічних відносин. Мета статті полягає у визначенні конкурентоспроможності на плодоягідному ринку за допомогою відносних показників порівняння переваг за обсягами формування пропозиції плодів і ягід різними категоріями господарств, цінами, помологічними сортами. У дослідженнях керувалися методичними підходами з визначення конкурентоспроможності сільськогосподарської продукції на українському аграрному ринку. При цьому використовувалися: діалектичний метод пізнання ринкових процесів та системний підхід, аналітичних узагальнень, статистичного порівняння, конструктивно-розрахунковий, абстрактно-логічний метод. На основі порівняльних показників конкурентоспроможності плодоягідної продукції на українському ринку, оцінено рівень ринкової конкуренції агроформувань та господарств населення: коефіцієнту ринкової конкуренції та індексу ринкової концентрації Герфінделя-Гіршмана. Встановлено, що відповідно до першого – за рівнем концентрації промислового сектору, український ринок плодів знаходиться у групі низькоконцентрованих. Інший показник, визначений для господарств населення, свідчить про низьку концентрацію, високу конкуренцію, достатню кількість операторів і слабку позицію окремого з них. За обсягами виробництва плодів і ягід українські виробники є більш конкурентоспроможними за імпортерів. За цінами – конкурентні переваги мали сільськогосподарські виробники та імпортери. Визначено конкурентоспроможні помологічні сорти плодів і ягід для виробників, торговців та споживачів на основі розрахунків конкурентних переваг та авторських досліджень торговельного і споживчого секторів. Визначено конкурентоспроможність різних категорій господарств на плодоягідному ринку, конкурентні переваги за обсягами виробництва, цінами та помологічними сортами плодів і ягід з позиції необхідності раціонального забезпечення потреб населення якісними продуктами харчування та подальшого поступу ринку. Результати досліджень варто використовувати під час формування цільової програми розвитку продовольчого ринку на довгостроковий період спрямованої, насамперед, на раціональне забезпечення населення України конкурентоспроможними за ціною та якістю продуктами харчування

► **Ключові слова:** плодоягідна продукція, виробництво за категоріями господарств, імпортні поставки, споживча ціна; помологічний сорт