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MARKETING ANALYSIS OF THE GLOBAL ORGANIC PRODUCTS MARKET

The article deals with the theoretical and practical aspects of the development of the organic market in Ukraine in view of the retrospective dynamics and current trends of the world and domestic markets. The conducted analysis of the world and European markets for organic agricultural products shows the significant dynamics and prospects of realization of a wide range of products. Due to the fact that Ukraine has low logistical costs for the potential export of products to the European market and low cost of organic products due to low labor costs, as well as the potential of land resources, we consider that the export of organic products is promising. The analysis of the internal market for organic products shows little dynamics due to low purchasing power. Therefore, the development of the domestic organic agricultural sector is seen in the study of the foreign market and export orientation.
The results of the study may be of practical value to producers and other participants in the Ukrainian organic market for forming their own production program, adjusting the production orientation and the range of products produced.

Keywords: Organic market, organic production, organic agriculture, world market, marketing research, conjuncture, export, import

1. INTRODUCTION

The dynamic development of organic production is due to global changes in the environment. The process of intensive agriculture with the use of chemical fertilizers and synthetic plant protection products has led to deterioration of soils, loss of its useful properties and fertility, as well as oversaturation of agricultural land with pesticides and various chemicals.

As a result of active use of mineral fertilizers in agriculture, there is a reduction in natural minerals reserves, from which chemical elements are extracted for the production of phosphorus, nitrogen, potassium and other fertilizers. The issue of food security, inferiority and malnutrition in the world deserves attention. According to the data of 2018 (Global hunger continues to grow…; Hutorov, 2013) the number of starving people in the world has increased to 821 million people, i.e. every ninth inhabitant of the planet is short of food and more than 150 million children have health problems due to malnutrition.

Thus, there is a need to develop organic production as an alternative to industrial agricultural systems, the possibility of restoring the ecological balance of agro-ecosystems and the production of safe agricultural products that will support the health of not only people but also the environment and soils.

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2. LITERATURE REVIEW

When analyzing the latest research in this area, it should be noted that the spread and development of organic production in Ukraine pays great attention of numerous Ukrainian and foreign scientists. E.V. Milovanov in his works highlights the experience of foreign countries in the field of state support of organic agricultural production (Mylovanov, 2018), emphasizes the advantages of organic food compared to conventional (Mylovanov, 2019) and the importance of organic agricultural production for rural development.

V.G. Granovska also pays attention to the study of the domestic and foreign markets of organic products with the proposal of the mechanism of stimulating the development of organic enterprises. V.I. Artysh studied the process of organic production management (Artysh, 2013; Artysh, 2014). N.A. Berlach in its scientific works the need to establish active participation of Ukraine in regulating the process of trade in organic products in the international space with a proposal of ways of legislative regulation in the field of organic agriculture (Berlach, 2009).

However, in our opinion, the issues of comparing world and Ukrainian trends in the development of the organic market with the possibility of transferring existing global trends to the Ukrainian organic agricultural sector, taking into account the peculiarities of its development, remain insufficiently studied.

3. AIM OF THE STUDY

Interest in the development of the organic agricultural sector is present in Ukraine. But domestic organic agriculture is developing gradually, at a much slower pace than the world. Thus, the purpose of our article is to analyze the world and domestic market of organic products, track global trends in organic production, compare the situation on the world and Ukrainian organic agricultural markets to assess the prospects of domestic organic agricultural business and transfer global trends to Ukrainian realities.

4. RESULTS AND DISCUSSION

Environmental problems are extremely relevant for agricultural production, because, unlike industry, agriculture is largely involved in the consumption of the world's natural resources. Organic production is a practical implementation in the field of agricultural production of the concept of sustainable development, which provides a combination of economic growth, social development and environmental protection as interdependent and complementary elements of strategic development, which will guarantee high quality food as an important component of food security (Artysh, 2009).

According to the latest research of the Research Institute of Organic Agriculture FiBL in cooperation with the International Federation of Organic Agriculture IFOAM will analyze the market of organic farming products (The World of Organic Agriculture, 2019). As of the end of 2017, statistical information on organic agriculture was provided by 181 countries, which is almost 53.6% more than in 2001. Worldwide, 69.8 million hectares belong to organic agricultural land (including land in conversion).

The area of the world's organic agricultural land increased by 52.5 million hectares compared to 2001, when it amounted to 17.3 million hectares, i.e. quadrupled. According to V.G. Granovska, a significant increase in the area of world organic land "… provides a basis for expert assessment of expectations of annual growth of more than 25%,

dynamic growth of the world organic market, increased competition in it" (Hranovska, 2017).

The regions with the largest area of organic agricultural land include Oceania (35.9 million hectares, or 51.0%), which is home to almost half of the world's organic agricultural land. It is followed by Europe (14.6 million hectares, or 21.0%) and in third place – Latin America (8.0 million hectares, or 11%) (Fig. 1).

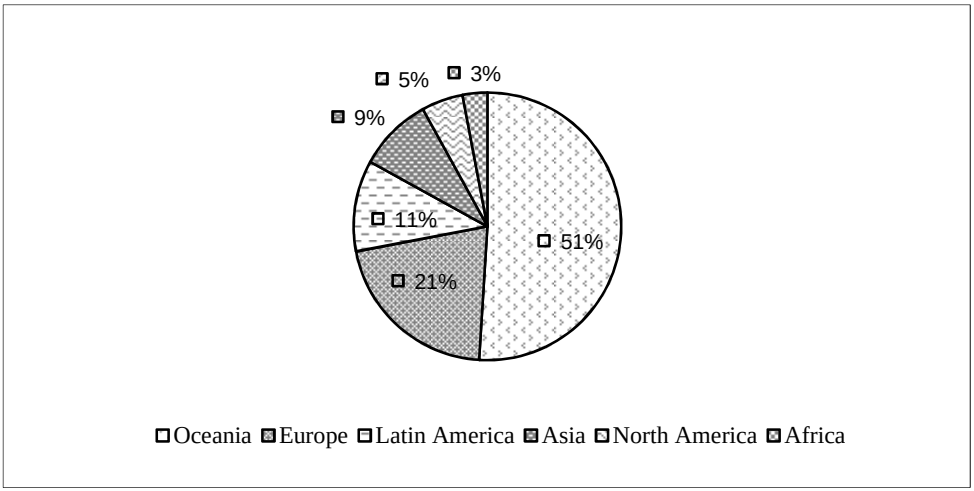

Fig. 1. Distribution of organic agricultural land by region, 2017

Source: (The World of Organic Agriculture, 2019).

The largest organic agricultural land is concentrated in Australia (35.65 million hectares), as 97% of the country's agricultural land is represented by large pastures, which are likely to be used in organic agriculture, including livestock. The second largest land in Argentina (3.39 million hectares), the third place is occupied by China (3.02 million hectares). In seven more countries of the world the area of the agricultural lands processed in an organic way makes more than one million hectares.

The total area of these ten countries is 54.85 million hectares, which is three quarters (78.58%) of the total amount of organic agricultural land in the world.

More than one percent (1.4) of the world's agricultural land is organic. The largest organic share in the total area of agricultural land on the continents as of 2017 – in Oceania (8.5%), followed by Europe (2.9%) and Latin America (1.1%). In other regions, the share of organic land is less than one percent. However, in some individual countries the percentage of organic agricultural land is much higher: Liechtenstein (37.9%), Samoa (37.6%) and Austria (24.0%) have a large share of organic land (Fig. 2).

In eight countries of the world, the share of organic land cultivated according to the principles of organic farming is at least 10% of the total area of agricultural land. In some island states, the share of agricultural land used for organic production is high, in particular Samoa and Saint Thomas and Prince. However, in 56% of countries with official statistics, the share of land under organic management is less than one percent.

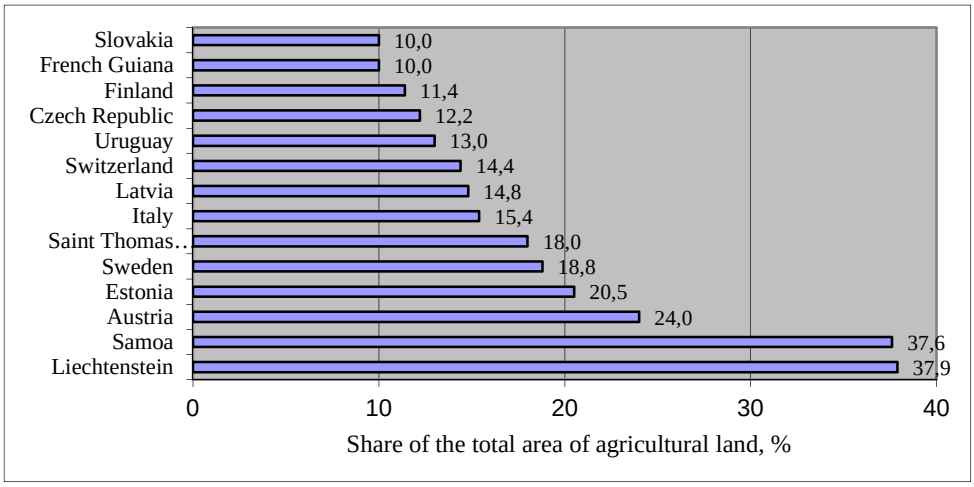

Fig. 2. Countries with the largest share of organic agricultural land, 2017

Source: (The World of Organic Agriculture, 2019).

In 2017, compared to 2016, the amount of organic land in the world increased by 11.6 million hectares, or 20%. The highest growth of organic land is observed in Oceania, Asia and Africa, where they increased by 31.3%, 24.9% and 14.1%, respectively. The absolute increase in land in these regions is: 8.5 million hectares in Oceania, more than 1.2 million hectares in Asia and plus 1 million hectares in Europe (Table 1). This increase is mainly due to an increase in organic land in Australia by 8.5 million hectares. China (absolute increase of more than 0.7 million hectares), Argentina – almost 0.4 million hectares more, the Russian Federation – almost 0.34 million hectares and India (almost 0.3 million) also contributed to the global increase of organic lands. Ninety-three countries reported an increase in the area of their organic agricultural land, while a decrease in land was reported by 36 countries.

According to the data shown in the Table 1, the area of organic agricultural land in the world for ten years has increased by an average of 75–100% in most regions, while in Ukraine the increase in the area of organic land in 10 times smaller – only 15%. Thus, the world organic agricultural sector is developing much faster than the Ukrainian one, and the domestic one has unused reserves for development.

As of 2017, there are almost 2.9 million organic producers worldwide, their number increased by 4.7% compared to 2016, and by 105.3% over the last ten years, mainly due to a large increase in India. The countries with the largest number of organic producers are India (835,000), Uganda (210,352) and Mexico (210,000).

Forty percent of the world's organic producers are producers in Asia, followed by producers in Africa (28 percent) and Latin America (16 percent), and therefore more than 80% of the world's organic producers are concentrated in these areas. More than two thirds of organic agricultural land as of 2017 belongs to perennial pastures (almost 48.2 million hectares). Arable land occupies 12.1 million hectares of organic agricultural land, which is 17% of all organic land in the world and 0.8% of all arable land on the planet.

Table 1. Growth of organic agricultural land by regions of the world, 2016–2017, 2007–2017

Region	Organic agricultural lands, 2016 (ha)	Organic agricultural lands, 2017 (ha)	Gain for 1 year (ha)	Gain for 1 year (%)	Gain for 10 years (ha)	Gain for 10 year (%)
Africa	1 801 699	2 056 571	254 872	14,1	1 163 089	130,2
Asia	4 897 837	6 116 834	1 218 997	24,9	2 757 650	82,1
Europe	13 535 235	14 558 246	1 023 011	7,6	6 261 881	75,5
Latin America	7 479 288	8 000 888	521 600	7,0	762 714	10,5
North America	3 130 332	3 223 057	92 725	3,0	645 554	25,0
Oceania	27 346 986	35 894 365	8 547 379	31,3	23 783 698	196,4
World	58 186 980	69 845 243	11 658 263	20,0	35 372 713	102,6
Ukraine	381 173	289 000	-92 173	-24,2	92 173,00	15,7

Source: compiled by the author on base of the (World of Organic Agriculture, 2019).

Most organic arable land (almost 60%) is located in Europe, Asia (22%) and North America (12%). They are mainly used for food grain including rice (4.5 million hectares), green fodder (2.8 million hectares) and oilseeds (1.2 million hectares), as well as legumes (almost 1 million hectares) and spinning crops 0.68 million hectares) (Fig. 3).

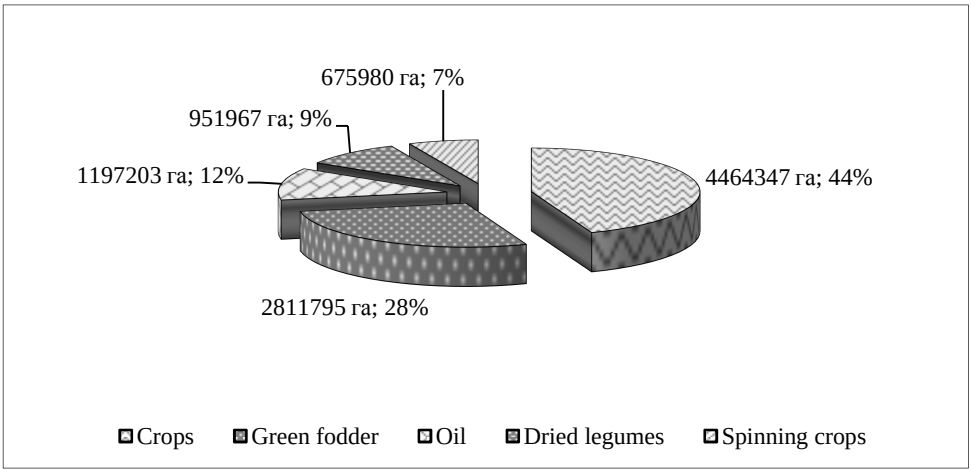

Fig. 3. Area and share of major crops in the structure of organic lands of the world, 2017

Source: built by the author based on the (World of Organic Agriculture, 2019 data).

Perennial crops cover seven percent of the 4.9 million hectares of organic agricultural land, or 2.9% of all land under perennial crops. Most of the land under perennial crops is located in Europe (33%), Africa (26%) and Latin America (20%). The most important crops are coffee and olives, which account for almost 30% of the harvest of organic perennials on an area of about 0.9 million hectares each. Important crops are also nuts (0.6

million hectares), grapes (0.4 million hectares) and tropical fruits (almost 0.4 million hectares) (Fig. 4).

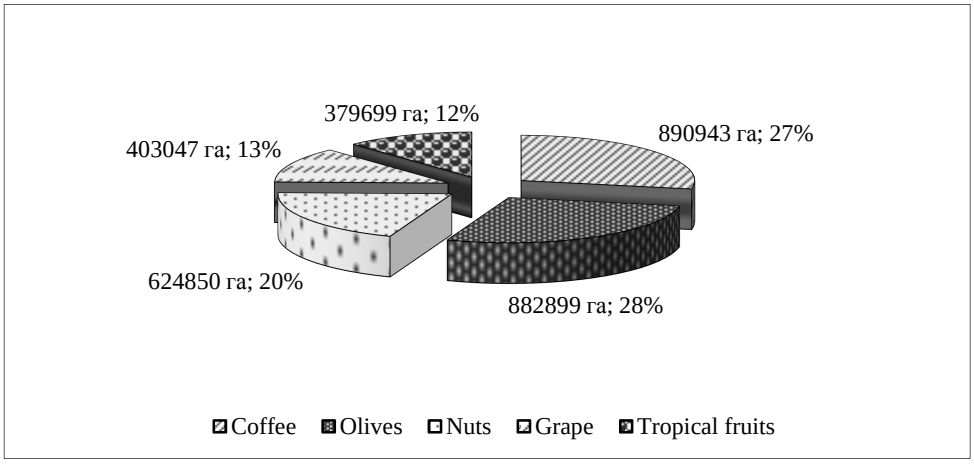

Fig. 4. Area and share of perennial crops in the structure of organic lands of the world

Source: built by the author based on the (World of Organic Agriculture, 2019 data).

The organic global market continues to grow. Global sales in 2017 reached $ 97 billion. In terms of regions, North America and Europe are the leaders, accounting for almost 90% of world income, although these regions together occupy only a quarter of the area of organic land. In addition to the fact that the United States has the largest single market – at $ 48.7 billion in 2017, almost 40% of Americans already consume organic products. At the same time, 37% of them consume these products more than once a day, 39% consume organic products at least once a week and only 24% consume organic products irregularly (Chaika, 2011). The European market for organic products is the second largest in the world and reached 39.6 billion dollars. Europe has the world's largest concentration of organic food retailers. A significant part of the profits falls on retail market participants – hypermarkets, supermarkets and discounters, which sell organic products under their private labels in order to obtain the largest sales of organic products.

The field of catering and food services draws consumers' attention to organic food. The number of restaurants, cafes and canteens, which offer visitors dishes of organic products and ingredients, is growing. Some governments encourage schools and government canteens to use organic food. It is important to note that domestic markets, in particular Asia, Africa and Latin America, are developing. Much of the organic crops grown in these countries are destined for export markets.

The growing trend towards healthy eating, which previously spread in Europe and the United States, is gradually spreading in Ukraine. Every year, the Ukrainian consumer becomes more careful and demanding when choosing food. The best taste and health properties of organic products compared to traditional ones, the absence of preservatives and chemical dyes, genetically modified organisms – these are just a few significant benefits of organic farming for human.

The total area of agricultural land occupied for organic production in Ukraine in 2017 compared to 2001 has almost doubled and is 289,000 hectares, which is 1% of agricultural land in Ukraine (Fig. 5).

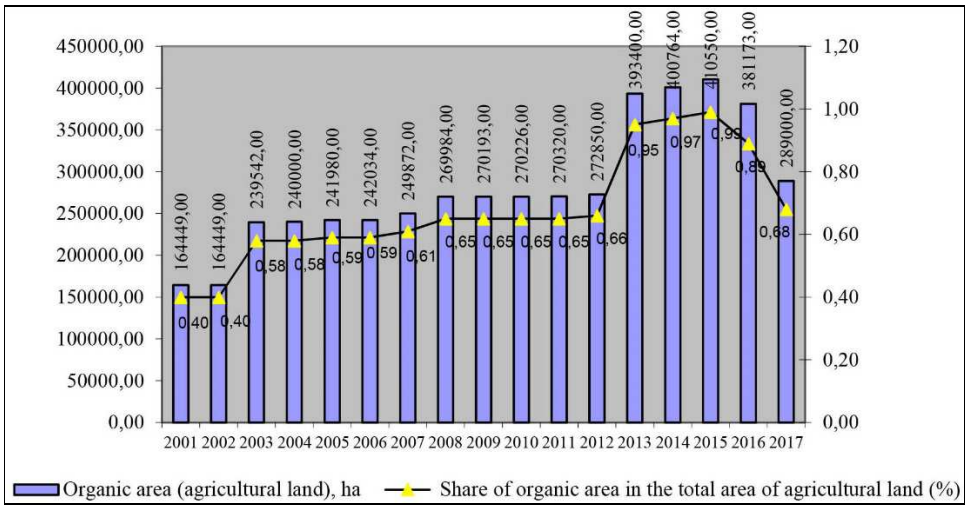

Fig. 5. Dynamics of the area of organic lands of Ukraine and its share in the total area of agricultural lands, 2001–2017

Source: built by the author based on the (World of Organic Agriculture, 2019 data).

According to O.V. Trofimtseva, the share of organic lands can be at least 5%. According to the author, the development of the organic sector in Ukraine is still hampered by weak marketing. Ukraine ranks 24th among the world's producers of organic products by area of organic land. The share of organic area in the total area of agricultural land in Ukraine increased from 0.4% in 2001 to 0.68% in 2017. In 2017, 304 farms were engaged in the production of organic farming products in Ukraine. In addition to direct producers, organic market operators are also traders, processors and entrepreneurs engaged in logistics, which as of 2018 there are 132. According to a survey of Ukrainian exporters of organic products conducted by the certification body “Organic Standard”, almost 80% of Ukrainian organic products in 2016, it was sent for export, the volume of which amounted to almost 300 thousand tons in the amount of more than 65 million dollars (Organic products market in Ukraine).

The domestic domestic consumer market of organic products has been actively developing since 2008. In 2004, it amounted to 100 thousand euro, and as of 2017 increased 290 times to 29.4 million euro. In the domestic market in 2016, organic products were sold for 21 million euro, which is approximately equal to 0.5 euro per person. In 2017, this figure rose to 0.69 euro per person, but remains catastrophically low compared to the world's countries with the highest *per capita* consumption of organic products, including Switzerland (274 euro), Denmark (227 euro) and Sweden (197 euro).

The market share of Ukrainian organic goods is about 0.1% of the market of all food products. Organic food and beverages make up 90% of all organic products in Ukraine.

The other 10% are cosmetics and hygiene products. In our country, Odessa, Kherson, Poltava, Vinnytsia, Zakarpattia, Lviv, Ternopil, and Khmelnytsky regions are most involved in the production of organic farming products.

In order to assess the export potential of the organic market of Ukraine, we analyzed the information of the promotional community of producers and exporters of Ukrainian organic products Organic Ukraine Business Hub, which represented a delegation of participants from Ukraine at the annual world exhibition of organic products Biofach in 2019. Thus, among the 50 domestic enterprises-producers of organic products, which, most likely, are already exporters of organic products, or have a desire to become them, 44 – direct producers and processors of organic products, the other 6 are organizations and enterprises, providing ancillary services: inspection and certification services, analytical services, fertilizer and biosoil producers.

Among the organic products that Ukraine can offer for import, the most represented are cereals and legumes (offered by 25 companies, a total of 18 crops), oilseeds (22 companies, a total of 7 crops), as well as fruit and berry (16 companies, a total of 22 crops). Six of the presented operators offer cereals, sugar, oil, as well as vegetables, melons (watermelons) and roots. Four companies produce flour, honey, spices, medicinal crops and industrial crops. The offer of meat, pasta, dairy products and cheeses, as well as tomato paste and sauces is limited. Thus, the supply of grain and legumes is the most export-oriented, as the grain itself has a long shelf life, which provides good prospects for its implementation both in the foreign market and in the domestic market. The permit for the export of organic products is opened through the procedure of obtaining a license, in which, as a rule, exporters are assisted by certification bodies working at the international level. Organic products, mainly in the form of raw materials, are mostly exported to European countries (Italy, Germany, Holland, Belgium, France, Austria), partly to North America (including the USA and Canada) and Japan. The most popular products of Ukrainian organic exports include corn, wheat, honey, raspberries and frozen berries. Only a part of organic food is produced in Ukraine. Other organic products are imported from the European Union, including Germany, Poland, France and Italy. Imported mainly cereals, cereals and pasta, then – beverages (coffee, tea, wine, beer), chocolate, sugar, organic butter and baby food. According to the consultant of the analytical department of Pro-Consulting Andriy Mokryak, technologically in Ukraine it is possible to produce more than half of the imported organic products and achieve an import substitution rate of 62.1% (20). In different parts of the world, more and more consumers prefer agricultural markets, organic supermarkets or organic stores in stores. In contrast to its European neighbors, where organic products are quite available to the public in the retail network, in Ukraine there are fewer specialized stores of organic food. Most outlets, including small specialty stores and individual supermarket shelves, are located in large cities and regional centers. Organic products are presented in the network of supermarkets Metro, Silpo, Furshet, Auchan, Good Wine, Megamarket. Consumers have the opportunity to order and purchase organic products and goods via the Internet in stores that have their own sites, as well as through social networks.

The introduction of organic agricultural production technologies in Ukraine is quite relevant, as organic farming promotes the reproduction of depleted natural resources, soil fertility, humus recovery, prevents soil erosion caused by traditional intensive farming. The process of using organic technologies requires lower energy and fuel costs, abandonment of synthetic fertilizers, pesticides and herbicides, the prices of which are

constantly rising. In particular, with professional (taking into account the natural potential of the soil, crop rotations, crop interactions, etc.) organic farming costs are reduced by 20–25%. It is important to note that more and more consumers are thinking about living a healthy lifestyle, their own health and their future, and are becoming more responsible for the environment. According to Yu.O. Lupenko, "potential consumers of organic products are about 5% of the population of large and about 1–2% of the population of medium-sized cities of Ukraine" (Lupenko, 2013).

Ukraine has significant potential in implementing the principles of organic farming as our country has almost 50% of the world's black soil reserves. Farming on the principles of organic farming is an opportunity to compensate for depleted due to intensification of agriculture soil resources of Ukraine, as the use of organic fertilizers gradually increases the humus content in the soil, and thus increases its fertility (Dzhyhyrei, 2006). However, the transition from conventional to organic agriculture in Ukraine is hampered by a number of environmental, economic and social problems. The main one is the low solvency of the market, due to which only 20% of domestic products of organic agriculture remain in the domestic market, and most of it is exported. Domestic consumers, even with information about the safety, health benefits of organic products and the contribution of the production process to the preservation of the environment, do not have the financial means to buy and consume it. We agree with the opinion of V.I. Artysh that "the growth of welfare of the population of Ukraine will lead in the long run to an increase in effective demand for organic products and stimulate its development in Ukraine" (Artysh, Chornyi, 2010).

5. CONCLUSIONS

The analysis of the world and European markets of organic agricultural products demonstrates the significant dynamics and prospects for the implementation of a wide range of products in these markets. Due to the fact that Ukraine has low logistics costs for potential exports to the European market, on the one hand, and low cost of organic products due to low labor costs, on the other hand, and significant potential for land resources, we believe that the export of organic products to the European market is very promising.

Analysis of the domestic market of organic products allows us to draw conclusions about the relatively small dynamics, which is due to low purchasing power. In the near future, as the level of purchasing power of the population of Ukraine does not tend to increase significantly and rapidly, the same low growth rates of sales of organic products in the domestic market are likely. Thus, we have a mismatch between the potential of production and the domestic market. Thus, the development of the domestic organic agricultural sector in general and the way out of this situation for producers in particular, we see in the study and study of foreign markets and export orientation. Because, in addition to the low purchasing power of the population in Ukraine, the export of Ukrainian organic products is also due to another important factor – the price, which in Europe is much higher for organic products.

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