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Marketing research of grain market conditions (niche crops)

Y. Ratushna

Master ORCID ID/Researcher ID-0000-0001-9151-8304

Vinnytsia Institute of Trade and Economics

Abstract. The grain market has absolute priority compared to other options for establishing economic relations, because the market system naturally combines the interests of consumers and producers of grain crops, in economic terms it is interesting for producers to meet the needs of buyers in bread products, which are reflected in significant demand. Ukraine has a huge potential for leadership in the world ranking of grain production and has tendencies to further strengthen its own positions on the international market, but it needs to improve technologies in this direction, as well as study the problems of the world grain market and justify algorithms for solving them at the national level. The purpose of the article is to determine trends in the grain market of Ukraine over the past five years and identify the most profitable crops for cultivation. During the research, the method of system analysis, generalization, induction, deduction, modeling and planning was applied. It has been established that the grain market has undeniable advantages compared to other forms of organization of economic relations. Trends to a significant decrease in the price policy on the market of grain and oilseed crops during 2016-2018 were revealed, and the transition from classic and traditional grain crops to legumes became characteristic of 2019-2020, which took place under the influence of a number of factors, including the increase in demand for leguminous crops, profitable relevance of leguminous crops, positive impact on soil cover. The prospects for the cultivation of niche crops are outlined, and the existing situation on the grain market and the situation of niche crops are highlighted. The segmentation of operators of the crop market was made regarding the production of niche crops. The practical value of the work consists in determining the further development strategy of the field of grain production in Ukraine

Keywords: marketing, price, sales prospects, infrastructure, global export

INTRODUCTION

The implementation of logistic approaches to increase the dynamics of international grain trade is becoming more relevant at the current stage of any country, as well as for the development of the Ukrainian economy, which specializes in this field. The dynamics of grain production is increasing every year. It is also necessary to realize that the grain can be of different quality and, as a result, have a different intended use. Thus, forecasts have been made that "over the next 10 years, Ukraine will continue to improve its position on the world grain market and, potentially, enter the top 5 grain exporting countries, increasing its share to

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14% [1]. This is stated in the forecast of the Organization for Economic Cooperation and Development and the World Food Organization. It is expected that the tendency to increase grain production will continue on the world market" [1]. Given the increase in yield, world production will increase by 375 million tons and exceed 3 billion tons, in particular, wheat production will increase by 86 million tons to 839 million tons. At the same time, the forecast is based on the current grain market situation, including niche crops in Ukraine. Therefore, we consider the issue of studying the development trends of the domestic market of niche crops to be relevant and important.

In the scientific literature, we find the work of modern authors who turned their research into the field of studying, substantiating and forecasting the grain market situation, in particular niche crops in Ukraine. In particular, T. Artyukh studied the marketing aspects of ensuring the activities of agricultural enterprises producing vegetable products [2]. While R. Buryak carried out a marketing research of crop production markets [3]. In the scientific works of V. Vlasyuk, A. Maksyuta, and S. Povazhnyuk, the trend of economic revival due to the industrial development of Ukraine is traced [4]. Instead, I. Demchak, O. Mytchenok, and G. Trofimova studied the foreign trade turnover of agricultural products [5]. Features of conducting marketing research by Ukrainian agribusiness subjects in modern conditions are reflected in the works of O. Yerankin [6]. T. Ilchenko identified the prospects of marketing research in the agricultural market of Ukraine [7]. In turn, M. Ilchuk, I. Konoval, O. Baranovska, and V. Yevtushenko traced the genesis of the development of the grain market in Ukraine and its stabilization factors [8]. In the conclusions of V. Mesel-Veselyak, potential opportunities for grain production in Ukraine were revealed [9]. The conclusions of V. Osetsky regarding innovative industrialization in the agro-industrial complex seem interesting [10]. Y. Kindzersky singled out the determinants of deindustrialization in the world and in Ukraine [11]. Modern research by scientists is related to the study of the effectiveness of the functioning of agricultural enterprises on the grain market: scientific foundations, state, prospects (M. Lyshenko [12]), substantiation of the scientific foundations of the development of the economy of Ukraine and certain countries of the world (A. Popova, O. Lohonya [13]), marketing studies of grain market conditions (D. Semenda, O. Semenda [14]). However, the problem of studying the marketing of niche crops on the grain market of Ukraine remains insufficiently studied. Therefore, the purpose of the article is marketing research of the grain market situation in the context of the development of the market of niche crops in Ukraine.

Prospects of the cereal market in the context of the form of organization of economic relations

The study of open data [15;16;17;18;19] regarding the market conditions of niche crops makes it possible to highlight several trends in its development over the past ten years. Let's consider the singled out factors in more detail.

The grain market has undeniable advantages compared to other forms of organization of economic relations, since the market mechanism naturally connects the interests of grain producers and its consumers, sellers and buyers, without orders and commands, materially interests producers in meeting the population's needs for bread products, which are expressed through demand. Under the influence of market processes, there is a natural selection of those producers who are able to effectively produce, promote, exchange, and consume bread products at equilibrium prices. The following economic characteristics are used to analyze and assess the state of the grain industry in Ukraine: "market size; market growth rates (%); industry life cycle stages; the structure of competition, the number of consumers and their financial capabilities; pace of technological changes and product innovations; the volume of investments and innovations; average industry profit" [13].

According to the USDA, ranking 8th in the ranking of world grain producers with a share of 3.3-3.5%, Ukraine provides almost 15% of global export needs and in 2019/20 took an honorable second place in the ranking of world exporters. As of November 30, 2020, the total gross collection of Ukrainian agricultural producers for the main crops reached 80.9 million tons, and work was carried out on 23.8 hectares. However, such record yield indicators were not achieved immediately. According to D. Semenda: "...the grain

market of Ukraine is one of the main segments of the agro-food market, the state of which determines the food security of the country."

It should be noted that the forecast regarding the supply and demand balance of grain and leguminous crops in 2020/2021 was successful (Table 1).

Table 1. *Forecast regarding the supply and demand balance of grain and leguminous crops 2020/2021*

	Grains in total, thousands of tons	including crops			
		wheat, thousand tons	barley, thousand tons	corn, thousand tons	others, thousand tons
Offer of grain	72907	26398	8269	35154	3086
Production	68163	25096	7772	33089	2206
Transitional residues	4486	1288	467	2029	702
Imports	258	14	30	36	178
The need to use	68725	24898	7769	33654	2404
Internal consumption	20811	7398	3937	7582	1894
Export	47914	17500	3832	26072	510
Expected balances	4182	1500	500	1500	682

Source: *summarized by the author based on data [15]*

At the same time, researchers are now emphasizing the significant prospective opportunities of the agricultural sector of Ukraine for the cultivation of niche crops. Cultures that "are not characteristic of the agro-industrial complex of Ukraine and therefore are not grown much" are usually called niche crops [12]. Among such crops, according to T. Ilchenko [7], "there are often those that are in great demand on the markets of other countries and are expensive at the same time. Thanks to this, if the business is effectively organized, the production of niche crops will be characterized by increased profitability" [8].

At the same time, when a profitable niche crop becomes known in broad farming circles, it often ceases to be a niche crop and quickly loses its market appeal. In particular, we are talking about spelled. When the profitability of its cultivation was mentioned at the "Million from a Hectare" conference, the following year, Ukrainian farmers were able to send so much spelled to the European market that its price immediately dropped three times. Therefore, niche crops should not be considered an agricultural Klondike today.

The question arises: which agricultural crops in Ukraine are now gradually leaving the niche category. We consider soybeans and rapeseed as such, which, thanks to their higher margins compared to, for example, traditional corn and sunflower, are grown today not only by small farmers, but also by large agricultural companies. Peas and lentils can also be included here – their crops are increasing every year. On the contrary, the areas sown under mustard are decreasing. The sorghum niche is also expanding rapidly. Experts predict an increase in the medium-term perspective of sorghum sowing areas from the current 40,000 hectares to 1.5 million hectares, and in particularly arid regions of Ukraine, sorghum may well replace corn [18].

Outlining the listed prospects for the cultivation of niche crops, we consider it necessary to highlight the current situation on the grain market and the conjuncture of niche crops.

Current situation on the cereal market

Thus, Ukraine is one of the top three countries in the world for exporting sunflower oil. In 2018, sunflower was grown on 23% of all sown land in Ukraine. Other oil crops occupied much smaller relative areas: soybeans – 8%, rape – 3%. Such an imbalance in favor of one oil crop is explained by the very high profitability of sunflower, which is 60-80%. In 2016, the export duty on sunflower seeds was reduced to 10%, for example in 1999 the export duty was 23%. At that time, the purpose of the high duty on grain was to stimulate the domestic production of sunflower oil, not the export of raw materials. However, the decrease in the export duty caused an increase in the profitability of the sale of sunflower seeds, and as a result, an increase in the cultivation of sunflower on Ukrainian lands. Table 2 shows the dynamics of cultivated areas, production and yield of sunflower in 2016-2020. Within the framework of the study, it was considered appropriate to analyze the sunflower market, because this fragment has not been studied.

Table 2. *Dynamics of sown areas, production and yield of sunflower in 2016-2020*

Year	Sown areas, thousand ha	Production, thousand tons.	Yield, tons/ha
2016	6086.7	13629.9	22.4
2017	6033.7	12235.5	20.2
2018	6117.1	14165.2	23.0
2019	6514.8	13998.2	23.8
2020	6812.2	14452.2	24.3

Source: *summarized by the author based on data [15;16;17;18;19]*

So, as can be seen from the data in Table 2, sunflower production decreased in 2017, which can be explained by a decrease in the area allocated for sunflower sowing, but since 2017, sunflower production has increased by approximately 15% and in 2018 amounted to 14.2 million tons. In the following years, a similar trend was observed in sunflower cultivation.

Constantly growing demand for soybean products and soybean oil, increased exports forced Ukrainian producers to increase capacity for soybean production (Table 3).

Table 3. *Dynamics of sown areas, production and productivity of soybeans in 2016-2020*

Year	Sown areas, thousand ha	Production, thousand tons.	Yield, tons/ha
2016	1859.4	4277.0	23.0
2017	1999.8	3899.8	19.7
2018	1716.2	4460.8	25.8

Table 3, Continued

Year	Sown areas, thousand ha	Production, thousand tons.	Yield, tons/ha
2019	1889.2	4296.0	24.0
2020	2010.8	4836.2	26.4

Source: *summarized by the author based on data [15;16;17;18;19]*

Compared to 2016, soybean acreage decreased slightly by 8%, but soybean production increased by 4% due to increased yields and capacity expansion. Soybean production in Ukraine decreased in 2017, which was associated with a decrease in production due to weather conditions and a reduction in the export of this product due to competition in foreign markets. In 2018, soybean production increased by 14%, which was caused by an increase in the export of this product. Production increased due to the increase in production capacity. The drought in Argentina led to an increase in world prices and had a positive effect on the marginality of soybean processing in Ukraine. Over the past two years, soybean cultivation has increased due to the use of modern technologies.

Despite the fact that the main solution for increasing production in Ukraine is to increase the area of sowing, the yield of soybeans has increased by 12% since 2016 and in 2020 amounted to 26.4 quintals from 1 hectare of land.

Historically, cereals (corn, wheat) and oil crops (sunflower) were most often grown in Ukraine. In recent years, the market price for this raw material has started to decrease, and the costs of cultivation and production are increasing. In search of higher earnings and reduction of cultivation costs, Ukrainian farmers began to grow leguminous crops, which are non-traditional for Ukrainian land.

The largest part of the sown areas is occupied by peas – about ¾, in second place – beans and already lentils, chickpeas, mung beans, lupins and others. In the Table 4 demonstrates the dynamics of the production of legumes in Ukraine in 2016-2020.

Table 4. *Dynamics of sown areas, production and yield of legumes in 2016-2020*

Year	Sown areas, thousand ha	Production, thousand tons.	Yield, tons/ha
2016	320.6	876.6	27.3
2017	506.3	12387.9	24.6
2018	565.4	9445.9	17.2
2019	598.6	14582.3	26.9
2020	602.3	14985.6	27.1

Source: *summarized by the author based on data [15;16;17;18;19]*

Despite the fact that the area of sowing and production of legumes has been constantly growing since 2016, this part of the market remains a niche for Ukraine. Demand on the international market for legumes significantly exceeds supply. Since 2016, the number of areas under leguminous crops has increased by 76% and amounted to 565.4 thousand hectares. The area sown under peas has increased significantly. Since 2016, the area has increased by 73%, and in 2017 it amounted to 415.8 thousand hectares.

However, despite the constant growth of the area sown under legumes, production in 2018 compared

to 2016 increased by only 8%, and if compared with 2017, it fell by 29%. This dynamic occurred due to the low yield in 2018. According to the State Committee of Statistics, "…in 2016, leguminous crops entered the TOP-5 most profitable agricultural products. They provided manufacturers with more than 76% profitability. In 2017, the situation only improved. Ukraine took third place in the world in terms of pea production, and the total volume of leguminous production in Ukraine was 1.2 million tons, which is one and a half times more than in 2016. The dynamic development of the leguminous industry in Ukraine is also evidenced by the fact that another six years therefore, these crops were grown only in the south and center of the country, and in 2018, farmers from Polissia and other northern zones joined the cultivation of legumes" [1].

Since 2016, the yield has decreased by 37% and in 2018 it was 17.2 quintals from 1 hectare. There are many factors for the development and market entry of legumes, the main ones are the huge sales market, the popularization of a healthy lifestyle in the world, the transition of the majority from eating meat to soy products, the growth of the population in Muslim countries, where most people cannot afford purchase, such an expensive product as meat, and completely replace it with soy products, as well as, which is important in agrarian business, the ability of legumes to revive the fertility of the land.

According to modern researchers, "…leguminous crops are the only crops that can provide a continuous supply to the food market of deficient protein, which is similar to animal protein in its amino acid composition" [7]. But even such a replacement does not satisfy the needs of humanity. "Manufacturers, who are focused on intensive technologies, strive to create a larger quantity of the product, and hardly pay attention to quality indicators. Therefore, the study of the optimal combination of technological methods of crop cultivation, which will ensure the formation of a high yield and quality, is relevant and timely" [11].

The presence of a large amount of protein in the grain is the main value of leguminous crops. This, according to T. Ilchenko, "…shapes the value of the product in terms of taste, technological and economic indicators" [7]. From the entire variety of legumes, promising and interesting for cultivation in Ukraine, according to the scientist, can be:

- "Peanuts – the oil of which is used in the confectionery, canning, oil and fat industry. Groundnut stalks and leaves are good fodder for cattle. The yield per hectare is from 1.1 to 2.3 t/ha of beans and 2.5-4.5 t/ha of hay. On irrigation – up to 4.2 t/ha of beans and 5.5 t/ha of hay.

- Cowpea – it is grown on an industrial scale in Mexico, Colombia, China, Japan and in relatively small quantities in the USA - as a vegetable, grain, fodder and cider plant.

- Astragalus – has a huge potential as a fodder, medicinal, honey and energy crop. Contains: 3.1% ash residues, 9% sugars, 18.6% dry matter. The average yield of above-ground mass of individual types of astragalus can reach 107 t/ha.

- Beans – which is the most cultivated representative of the legume family. Beans contain proteins (25-35%), carbohydrates, nitrogenous substances, flavonoids, sterols and organic acids, as well as vitamins B6, B5, B1, C.

- Galega (goat field) is both a fodder, medicinal, and honey crop. And another good option for improving soil fertility. Galega can leave behind in the soil from 400 to 600 kg of nitrogen per year" [7].

Ukraine owns a fourth part of all sunflower areas in the world, and grows a third part of the world crop. Over the past decade, the oil-fat complex of Ukraine has been characterized by steady growth in the production of vegetable oils.

"The influx of investments, according to V. Vlasyuk [4], stimulates the expansion of production capacities, which strengthens the export capabilities of domestic manufacturers and contributes to strengthening their positions in global trade" [4]. In 2017, the capacity of the oilseeds market decreased by 13% due to high demand in foreign markets. In 2018, the increase in capacity is due to the increase in prices on the domestic market. The outlined trend was also observed in 2020 (Table 5).

Table 5. *Market capacity of oilseeds and legumes in 2020, excluding soybeans and sunflowers, thousand tons*

	Oil	Legumes	Soybeans	Sunflower
Production, thousand tons	21439.7	14985.6	4836.2	14452.2
Export, thousand tons	4783.9	9863.7	2456.1	61.2
Import, thousand tons	82.25	0.01	5.3	29.9
Market capacity, thousand tons	16738.2	14685.2	2489.1	14236.7

Source: *summarized by the author based on data [15;16;17;18;19]*

Sunflower occupies 84.5% of the entire Ukrainian market of oil crops. The remaining 3% was distributed between peanuts, linseed, rapeseed and other oil crops. The legume market in Ukraine is 81% represented by peas, the share of other legume crops on the market is insignificant. Ukraine is one of the leaders in the world export of grain and oil crops. Most of the largest agricultural holdings in the country work with these crops (Table 6).

Table 6. *Segmentation of crop market operators by crops (by production)*

Name of Company	Crops				
	Grain	Technical	Beans	Vegetable	Oil
UkrLandFarming	+	+		+	+
Kernel	+				
Agroprosperis	+				
Myronivski khlebo product	+				
Astarte	+	+		+	
Mriya Agroholding	+	+		+	
Ukrprominvest-AGRO				+	
IMC	+		+	+	+
AGROTON	+				+
AgroGeneration	+				+
Agroholding 2012	+		+		+
Agress	+	+			+

Table 6, Continued

Name of Company	Crops				
	Grain	Technical	Beans	Vegetable	Oil
Harvest	+	+			
Tas Agro	+				+
Agrarian system technologii	+	+			
Nibulon	+				
Svarog West Group	+	+			+
Privat-AgroHolding	+	+		+	
Dawn	+	+	+	+	
UkrAgroCom and Hermes-Trading	+				+

Source: *summarized by the author based on data [15; 16; 17; 18; 19]*

Based on the segmentation by species, 19 of the top 20 companies in the crop market cover the grain crops segment, almost 50 percent of the companies cover the oil crops market. The least amount is in the field of leguminous crops, they are grown by only 3 agricultural holdings out of 20.

The largest amount of land owned by holdings included in the TOP 20 is located in Vinnytsia region, 10 out of 20 enterprises were located in this region, Zhytomyr and Kyiv regions, with 8 out of 20 agricultural holdings, are in second place in terms of the concentration of crop market operators. Cultivation of pulses is profitable for export-oriented enterprises, since the outlined crops have a large margin compared to crops of the oil family or cereals. A big jump in exports between 2016 and 2017 occurred as a result of the fact that in 2017 Ukraine began to export non-dried peas, until 2017 all peas were exported under the VED code – dried. Since 2017, the export of grain legumes has fallen by 15%, this trend is related to their low harvest in 2018.

In 2018, most legumes were exported to Spain and India – 81.36 thousand tons and 54.1 thousand tons, respectively. The export of other leguminous crops, except for peas, is very insignificant, so it can be assumed that Ukraine exports only peas from legumes to the international market. The next most popular leguminous crop, beans, was exported in 2018 in the amount of 0.02 thousand tons.

Traditionally, Ukraine is one of the leading exporters in the sunflower market, primarily due to the appropriate climate and soil. The decrease in export duties to 10% had a positive effect on the dynamics of the export of oil crops. Sunflower seeds accounted for only 1% of the total export of oilseeds, as a large part of sunflower seeds is used to make sunflower oil. The largest amount of sunflower seeds was sent to Turkey and Italy. Turkey accounted for 41% of Ukraine's total export of sunflower seeds, followed by Italy with 17%. A small share of the export of oil crops was linseed and peanut, 0.14 and 0.02 thousand tons, respectively. In total, 12.9 thousand tons of flax seeds were exported from Ukraine, the most to Bangladesh and Poland, 1.6 and 1.4 thousand tons, respectively.

Among all oil crops, peanuts are grown in much smaller quantities, unlike other groups. Its exports amounted to only 23.1 tons, of which 23 tons were exported to Kazakhstan. In 2018, 2,440.6 thousand tons of rapeseed were exported from Ukraine, most of them to Germany and Belgium. Soybeans were exported the

most to Turkey (853 thousand tons) and to Belarus (355 thousand tons), which accounted for 38 and 20% of the total export of soybeans from Ukraine. In 2016-2020, the import of legumes in Ukraine increased by 33% and amounted to 0.01 thousand tons in 2020. Beans account for most imports from other countries. The import of oilseeds in Ukraine from other countries has decreased, and since 2016 it has increased by 21%, most of the oilseeds we import are peanuts, which are not a traditional crop for Ukrainian lands.

Among legumes, the most common imported crop is beans, its share is 86% of the total amount of imports of legumes, the second most popular is peas, its share is 14%, and a very small part of other, less popular, leguminous crops (lentils, chickpeas , mung bean) they were imported only 0.01 tons during 2020. Canada is one of the largest players in the market of legumes in the world and ranks first in the import of legumes to Ukraine. It accounts for 44% of all Ukrainian imports of legumes in 2020. In second place in the import of legumes to Ukraine is Kyrgyzstan, which accounts for 19% of the import of leguminous crops. Egypt, Turkey and Guatemala are also among the TOP-5 countries of bean importers.

CONCLUSIONS

Historically, Ukraine is a country in which crop production plays a major role in GDP. The main reasons for this trend are a favorable climate and suitable soil. Ukraine is the leader in the export of grain and oil crops. The main trend of the crop market was price reduction in 2016-2018, the price of grain and oil crops fell by almost half. On the other hand, one of the trends of the Ukrainian market in 2019-2020 was the transition from traditional grain crops to legumes, which was influenced by several factors:

- high profitability of leguminous crops;
- demand for legumes on international markets (transition to healthy food, since legumes are a source of high-quality protein, and the cheapness of legumes compared to meat)
- having the ability to restore soil fertility, legumes have a positive effect on land cover.

Leguminous crops, which are not traditional for our country, are a niche industry for Ukrainian enterprises. Of all the various groups, Ukraine grows only peas and some beans. There is a huge potential for the development of this type of crops and access to the market with such rare and currently popular leguminous crops as chickpeas and lentils, mung bean. However, for Ukraine, the task of changing productivity indicators is a priority. While today, global agricultural holdings direct technical and human resources to the production of defined niche crops. Prospects for further research consist in forecasting the economic indicators of the export of niche crops for the next five years.

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Маркетингові дослідження кон'юнктури ринку зерна (нішевих культур)

Ю. Л. Ратушна
магістр ORCID ID/Researcher ID-0000-0001-9151-8304
Вінницький торговельно-економічний інститут КНТЕУ

Анотація. У статті проаналізовано результати сучасних маркетингових досліджень кон'юнктури ринку зерна, зокрема нішевих культур в Україні. Встановлено, що ринок зерна володіє незаперечними перевагами порівняно з іншими формами організації економічних відносин. Окреслено перспективи вирощування нішевих культур та висвітлено існуючу ситуацію на ринку зернових та кон'юнктуру нішевих культур. Зроблено сегментацію операторів ринку рослинництва щодо виробництва нішевих культур

Ключові слова: зерно, нішеві культури, кон'юнктура, ринок, маркетинг, ціна, збут, перспективи збуту, інфраструктура