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CORRELATION OF COMPETITIVE MARKET STRUCTURE AND INNOVATIVE ACTIVITY OF OIL AND FAT COMPANIES

The article considers the current state of the oil and fat industry from the standpoint of its competitive structure, and identifies the main problems of its development in Ukraine. It was established that the fat-oil sub-complex is one of the most promising sectors of the national economy. The sub-complex fully meets the needs of the domestic market in oily products and allows exporting products to foreign markets. In addition, its role is important in shaping the consumption fund, solving the problems of internal food security, ensuring currency and tax revenues, as well as solving a number of social problems through the creation of a significant number of jobs in the fat and oil sub-complex and related industries.

The industry has a high level of monopolization. Most enterprises are part of large corporate agribusiness formations, agroholdings and multinational companies. Monopolists can dictate their conditions both in the market of raw materials and in the market of finished products by consolidating their companies. It allows them to regulate profitability of production and to reduce the influence of competitors.

Competition in the global markets of vegetable oil has escalated in recent years. A complex of problems, the solution of which will largely determine the development of the oil and fat industry in the long term, is connected both with the increase in the raw material base and the expansion of various types of oilseeds production, and with the modernization and expansion of production capacities on the basis of scientific and technological progress, the development of a new innovation-investment strategy of forming industry competitive advantages of oil and fat companies by improving competition policy.

Key words: agribusiness, oil and fat industry, innovative activity, oligopolistic structure, firm behavior strategy, the price trend, economic conjuncture.

The level of innovative activity of firms is one of the main indicators of the country's economic development. It is generally accepted that innovation activity is part of the company's overall strategy aimed at achieving its respective positions in the industry. This approach is consistent with the opinion of J. Schumpeter on the dual nature of competition: as an organizing

or creative force and as a disorganizing force in the form of “creative destruction” [1, p. 128]. As a result, competition as a dynamic process contributes to the emergence of new technical and technological solutions, new products, forms of organization of production, sources of raw materials.

In a market system, firms directly make strategic decisions to finance research, bear the risk for the consequences of implementing investment decisions. The degree of innovative activity of firms and the nature of innovations are largely determined by the competitive structure of the industry. The latter causes a degree of competition intensity, the presence of entry barriers to the industry, the possibility of accumulating financial resources for R & D (Research & Development), the ratio of independence in innovative activity and imitation.

This relationship is two-sided. On the one hand, the existing competitive structure of the industry determines the nature of the company's innovative behavior. On the other hand, the dependence of the firm's positions on the adopted innovative solutions, also affects the type of market structure itself. Investments in development on the part of firms that have become entrenched in the market, create in fact additional natural barriers to the entry of new firms. All this leads to a change in concentration and degree of competition.

It is very typical to find in literature attempts to compare two "extreme" forms of a competitive organization - perfect competition and monopoly. However, the problem of innovative activity of firms on the oligopolistic market is of considerable interest. According to R. Nelson and S. Winter, proponents of the evolutionary approach to the study of economic changes, it is the oligopoly that is the market structure that was formed in the sectors where the process of financing and introducing new technologies was intensively engaged [2, p. 237].

The problem of innovation activity of firms in the Ukrainian market has another important aspect nowadays. A decline in business activity that the domestic economy is experiencing now, is followed by a reduction in the costs of developing innovations. However, the analysis of the activity of large firms, especially in oligopolistic markets, both high-tech and less technologically advanced, demonstrates that for many of them, investments in R & D retain their priority during the periods of unfavorable economic conjuncture. This allows them to achieve strategic advantages, enter the new markets and consolidate positions in the industry after the crisis is over.

The article studies the oil and fat industry of the Ukrainian economy, which is actively developing, and is one of the leading for the country's economy. However, significant changes in the world vegetable oil market

create threats to its further development, and stimulate the main players of the market to search for ways to increase competitiveness through innovative solutions in the market of standardized products.

Various aspects of development of the oil and fat industry were reflected in the works of such scientists as V. Andriychuk, N. Valinkevich, S. Kapshuk, V. Karetnikova, V. Kuchta, S. Kvasha, T. Oliynyk, M. Prisyajnyuk, and P. Sabluk.

Ukrainian oil and fat industry covers three categories of firms. The first category includes the enterprises that produce vegetable oil. These are oil and fat plants and oil extraction plants, which are located near the areas of oil-bearing crops. The second category is the processing enterprises, where small quantities of oil are produced for the needs of farmers and the rural population. The third category covers margarine factories, soap mills and other manufacturers.

It should be noted that the oil and fat sub-complex determines the operating conditions and prospects for the development of not only the industries involved in it, but also of related industries (confectionery, dairy, bakery, and textile industry). In addition, the processing of many oilseeds is almost non-waste. So, in the production of sunflower oil from sunflower seeds, a husk is formed, which is used in the production of pellets; cake and meal are liquid feed products containing a significant amount of protein. Among other advantages, such wastelessness allows to optimize the taxable base of the enterprise.

Recently, there has been a steady growth trend in the production of oilseeds between agrarian enterprises. So, if the share of acreage under oilseeds in 1990 was 5.71 %, in 2000 – 11.98 %, 2005 – 17, 40 %, 2010 – 25.05 %, and in 2016 – 31.1 % [3].

According to the forecast of USDA, in 2016/17 marketing year (MY) 13.5 million tons of sunflower seeds will be produced in Ukraine, which is 30.7 % of the world production. The volume of sunflower oil production will reach 5541000 tons, of which 4950000 tons will be exported. This accounts for 56.4 % of the world exports of this product. The production of sunflower meal will reach 548,800 tons, of which 4,700,000 tons will be sent for export, which is 64.6 % of the world export of this product [4].

At the same time, the geography of exports of Ukrainian sunflower oil is expanding significantly. If in the early 2000s it was imported by thirty countries of the world, it is currently being imported by 117 countries.

Thus, the leap that has taken place over the last two decades allowed the oil and fat industry of Ukraine to become a powerful industry characterized

by high profitability and growth rates. The starting point of this process can be considered 1998, when the government adopted a 23 per cent export duty on sunflower seeds. The reduction in raw materials exports and the resulting redistribution of capital resources led to the fact that during this period 35 new oil-producing plants were built in Ukraine, and the processing potential increased almost seven times, up to 18 million tons [5].

Comparing the above data, we can note a significant excess of the processing potential (18 million tons) over the volume of sunflower production (13.5 million tons). And while maintaining the existing trend, the processing capacity of raw materials will reach a figure of 20 million tons by 2020. This indicates that the industry has an excess of production capacity. The paradox of the situation is that there has been a decline in prices for sunflower oil on world markets for the past three years. For example, in 2015/16 the price for sunflower oil varied within 3-5 % of the price declared at the beginning of the season, and for meals, the price reduction sometimes reached 30-33 %. Even taking into account the significant reduction in supply prices (an average decrease of 15 dollars per ton), demand prices are \$ 10 lower.

However, this downward trend in consumption and prices coexists with production growth. Taking into account the low volumes of domestic consumption of sunflower oil and surplus, as a characteristic of this market (domestic demand is 10-15 %, external accordingly is 85-90 %); it would be logical to expect changes in the domestic commodity market. However, the prices for sunflower seeds remain here at a consistently high level are \$ 400 per ton.

This, of course, can be explained by the competition of processing enterprises for raw materials. At the end of 2015/16 MY the production of sunflower seeds became the most profitable type of agrarian business with a profitability index of 80.3 %. Last year, the profitability of growing sunflower by large agrarian companies reached 95-97 % [6].

Thus, the situation on the oil market is quite contradictory; it spontaneously develops with hardly predictable consequences. The competition in the world markets of vegetable oils has significantly worsened in recent years. The principal changes that occur in world markets and are associated with the decline in oil prices, global economic and political instability, the strengthening of the dollar, the slowdown in the growth of the Chinese economy (China accounts for 13.8 % of the export of Ukrainian sunflower oil), form new influence factors on prices,

require the modification of strategies of firms' behavior in these markets.

The internal conditions for the development of this market have also changed. Those circumstances that played a decisive role at a certain stage and allowed us to concentrate resources for investing in the Ollie-extracting industry (low cost of land rent, cheap labor, and devaluation of the hryvnia) are gradually exhausting their potential. In 2016, the system of a special VAT regime for entrepreneurs of the agrarian sphere has changed; most of the tax benefits to agricultural enterprises have been revised, reduced or completely abolished. The agrarians could leave the VAT to themselves in full until January 1 of the current year, now the producers of technical crops can use only 15 % of this amount for their own purposes, and 85 % of the VAT amount is transferred to the budget.

The scheme for the development of the oil and fat industry in Ukraine that has been formed at the present time, is based on the use, first of all, of extensive growth factors: (1) the expansion of the areas occupied by oil crops; (2) the increase in the processing capacities of raw materials; and (3) the export of the bulk of the products.

It should be remembered that the paradoxical nature of the market situation and the formation of an equilibrium price, which has been mentioned above, is absolutely understandable from the point of view of economic theory and can be typical for the short term due to the low elasticity of supply in the raw materials market. Of course, in conditions of excess production capacity and incomplete loading of processing enterprises in the long term, completely different consequences are possible: closing down enterprises, changing the range of products, that is, changing the parameters in the industry. Therefore, market participants must look for new ways to adapt to the changing factors of both the domestic and global markets today. On that basis, I would like to dwell on some of the problems typical for the oil and fat industry of the country.

At present, Ukrainian fat and oil industry is characterized by a high level of monopolization. There are more than 1.2 thousand enterprises in the region, but in 2016 the top ten companies accounted for 71.6 % of the production of unrefined sunflower oil, six enterprises concentrated 62.3 % of the refined oil production and 73.2 % of the production of margarine products from the corresponding volumes of their total production in Ukraine. The structure of this production is given in Tables 1, 2, 3 [7; 8].

Table 1

The main producers of unrefined sunflower oil in Ukraine in 2016

Name of the enterprise	% (to the general product)
Kernel	23,8
Zaporozhye	7,8
Bunge Ukraine	7,7
MHP	7,5
ViOil	7,2
Cargill	4,6
Wilmar International Limited	4,2
Allseeds	3,6
Pologovskiy oil extraction plant	2,7
Satellite OIL	2,5
Total	71,6
Others	28,4
TOTAL FOR UKRAINE	100,0

Table 2

The main producers of refined sunflower oil in Ukraine in 2016/2017 MY

Name of the enterprise	% (to the general product)
Bunge Ukraine	17,47
Kernel	17,04
Wilmar International Limited	10,39
PE "Victor and K"	9,74
Optimus Agro	8,63
Others	36,73
TOTAL FOR UKRAINE	100,0

The biggest producers of packaged sunflower oil during the reporting period were Kernel, Bunge Ukraine and Unity Group Yedinstvo.

Table 3

The main producers of packaged sunflower oil in Ukraine in 2016/2017 MY

Name of the enterprise	% (to the general product)
Kernel	41,06
Bunge Ukraine	26,25
Unity Group Yedinstvo	12,64
Von Zass AG	7,88
PE "Victor and K"	6,38
Others	5,79
TOTAL FOR UKRAINE	100,0

Such market parameters make it possible to characterize this market structure as oligopolistic. The peculiarity of the oligopoly is in the absence of price competition, especially in the market of a standardized product, the implementation of a coordinated policy. And in the coming years, a further concentration of this market is projected by crowding out small and medium-sized firms.

The largest producer on the Ukrainian market is the group of companies Kernel, which is a vertically integrated company that includes Prykolotnyansky, Volchanskiy, Poltavsky, Bandursk oil-extraction plants, Kirovogradoliya, Ukrainian Black Sea Industry LTD, Ekotrans LTD, Ellada LTD. According to 2016, they produced 23.8 % of unrefined sunflower oil in Ukraine. Kernel Group is not only a leader in the production of oil, but also its main exporter. It purchases raw materials from thousands of Ukrainian farmers and produces about 7-8 % of world production of sunflower oil and sells it to all major markets, including India, European Union countries, Egypt and Turkey. The processing capacity is 3.0 million tons of sunflower seeds per year, equivalent to 1.3 million tons of sunflower oil in bulk and about 1.2 million tons of sunflower meal [9].

Cargill (USA) is one of the world's largest producers and suppliers of food products and agricultural products. Currently, "Cargill" is present in 67 countries and has more than 150 thousand people. According to public reports, the sales volume of Cargill Corporation exceeds \$ 100 billion, and the annual income ranges from \$ 1-3 billion. It is a global vertically integrated company that actually controls the chain of production and delivery of food products to end users. It is often an exclusive supplier of raw materials and ingredients to other world-famous food giants such as McDonald's, Kraftfoods, Walmart. In 2013, the company's share in the Ukrainian oil production market was estimated at 11.0 % and its share in the total export of sunflower oil was 12 %. Now the company's share has decreased (4.6 % of the production of unrefined sunflower oil due to the loss of Donbas plant) [10].

Delta Wilmar CIS produces today 9 % of refined and 4.2 % of unrefined sunflower oil in Ukraine. The founder of Wilmar International Limited is the leader in the processing and trade of vegetable oils in Asia. Today, Wilmar International Limited is listed among the largest companies by the value of shares on the Singapore Stock Exchange. Its activities include palm plantations, edible oil processing plants, special fat production plants, oil processing products, biodiesel, processing and grain trade. The company's administrative office is located in Singapore. More than 160 production facilities are located on four continents. About 67,000 people work at the

enterprises. Due to the large distribution network the company's products are supplied to more than 50 countries [11].

The transnational company Bunge (USA) is a leading global company working in the field of agribusiness and food products. It operates in more than 40 countries. The number of employees reaches almost 35 thousand people. Bunge is engaged in the purchase, sale and storage of cereals, it processes oilseeds, produces sugar and ethanol from sugarcane, processes wheat, corn, and rice to make ingredients used by food manufacturers. Bunge also sells fertilizers in South America.

The main assets of Bunge in Ukraine are the Dnepropetrovsk oil extraction plant, which produces refined sunflower oil under the brand names “Oleyna”, “Umnitza”, and an oil extraction plant in Nikolaev with elevators in a number of regions of Ukraine. In addition to grain and butter sales, the company also sells plant protection products, seeds.

This is not a complete list of financial and industrial groups and holdings, which are dominant today in the oil and fat industry. Significant own financial resources and access to credit resources, an advanced logistics system, opportunities for risk diversification create advantages for large business structures.

The imbalance between the amount of raw materials and the processing capacities of the processing enterprises has significantly changed the strategy of the behavior of sunflower producers, many of whom use their elevators to store raw materials. If earlier the raw materials were sold immediately after harvesting, today agrarians expect the most convenient moment, being guided by the market conjuncture. It is almost impossible to create sunflower stocks for several months of processing. To some extent this circumstance allows small processing enterprises to survive and be present on the market since the need to accumulate large working capital and use expensive credit resources has disappeared. Moreover, the importance of another competitive advantage, independent of the size of the enterprise, has increased – the proximity to the producers of raw materials.

The change in the strategy of firms' behavior in the oil and fat industry, caused by increased competition in international markets and negative price trends, may be associated with the transition of producers to higher price segments by deepening the processing of raw materials. The main way to strengthen the competitive positions of the industry in international markets is the use of innovative solutions.

The use of innovative technologies in agribusiness makes it possible to increase the efficiency of management by 17-45 % or more. However, only 5-10 % of companies use innovations in Ukrainian agriculture today [12].

The leader of innovations in the agribusiness of Ukraine in general and the fat and oil industry in particular is the diversified integrated company Kernel. Kernel is one of the three largest agricultural holdings in Ukraine. Its land bank is 390 thousand hectares. The main crops are wheat, corn and sunflower. In addition, Kernel has the largest network of its own grain elevators in Ukraine and is the leading operator in the field of providing grain storage services.

The production chain of the company's enterprises includes: production of agricultural products, concentration, logistics and international sales of grain; production of raw and bottled sunflower oil and its sale in the international and domestic markets.

The business model of Kernel includes: own farming, third parties – farmers, storage at elevators, plants for processing sunflower seeds, grain exports, packaged sunflower oil, export terminals. The company's shareholders are European institutional investors and pension funds.

Innovation plays a key role in achieving Kernel's strategic goals. In recent years, the company has actively used a number of innovative solutions that have reduced costs by 10-15 % and significantly improved production efficiency. In 2011 the company started to implement the elements of precision agriculture, such as a GPS-controlled soil sampling system, the technology of differential fertilizer, the spectrophotometry, the technology of mapping yields, the satellite monitoring of weather conditions and the reserves of available moisture in the soil. The company is planning to invest 15000000 dollars in precision agriculture [13].

The company launched such projects as “Mobile Agronomist” and “logistics of harvesting” in 2016 in order to improve the dispatch system. The implementation of these projects made it possible for each participant of the operational process to obtain detailed information on the movement and use of inventory in the process of agricultural operations. The company has its own research and development center, where about 1,500 scientific researches are carried out annually, much of which is unique.

Timely decision making is of particular importance for the agrarian business. In this regard, one of the most important areas of innovation in the industry is the construction of systems that help us make decisions based on a large array of data (including historical data). The creation of such systems for the effective management of agribusiness with a large bank of land is impossible without the use of modern IT technologies. Large holdings most often build

independently their own management systems, but only a few manage to do it in systematically.

In 2016, Kernel began to develop and implement a large-scale innovative project to create an integrated information management system for agribusiness #DigitalAgriBusiness, which has no world analogues. #DigitalAgriBusiness is a project of global automation of production processes based on the use of the best world IT technologies for business management and modern agronomic practices. Taking into account the lack of ready-made analogues in the world market, Kernel decided to attract the best Ukrainian companies engaged in the development of world market software to help them develop #DigitalAgriBusiness.

In addition to the use of technical innovations and development of new information management systems for production in the conditions of intensifying competition, the further development of the oil and fat industry implies innovative solutions in the form of using new niches with great potential.

The main competitors of sunflower oil today are palm, soya and rapeseed oils. Their consumption is much higher than other vegetable oils with significant dynamics of growth up to 2020. Over the past 20 years, palm oil has become an absolute leader in the market. Its low cost and characteristics suitable for use in various sectors of food industry have made it possible to find palm oil in most foods. But scientists have been studying the impact of palm oil products on human health for more than a decade and have been discussing the negative impact of Trans fats on human body, particularly of Palmitic Acid highly presented in the palm oil. A new law was adopted in the European Union and the level of monochloropropanediol molecules in food has been taken under control starting 2017. Accordingly, palm oil will gradually reduce its role. Today such large companies as Unilever and Nestle are beginning to change recipes to find a replacement to this oil. They do not want to produce food with carcinogens.

In the EU, the number of Trans fats in products is limited up to 5 %, and in Denmark is up to 2 %. This limitation is for manufacturers and exporters. Starting December 2016 it has become obligatory in the Eurozone to give detailed information of the product nutritional value on labels, show in descending order which specific components were used during the production. Saturated fatty acids must be mentioned separately [14].

The moment Palmitic Acid becomes a well-known risk, consumer demand in the food industry is expected to change. Therefore, experts expect constant

growing demand for sunflower oil. Sunflower is an organic product. It does not have genetically modified industrial varieties. In contrast to soya, rape and corn, it develops exclusively as a result of breeding. And this means that vegetable oil falls into the niche of environmentally friendly crops. The need for organic products makes it even more attractive.

Therefore, the production of high-oleic oils is a new promising niche in the market for fat and oil products, the oleic acid content is at least 82 % in the seeds of high oleic sunflower, while in the seeds of the usual one this number varies between 20-27 %.

High oleic sunflower oil, compared to other edible oils, has the highest content of vitamin E, which is a natural antioxidant and strengthens human immunity, reduces the risk of cancer and cardiovascular diseases. Shelf life of high-oleic oil is four times higher than that of traditional oil. It has a lot of health benefits; it can compete with olive oil and replace palm oil in 70 % of cases.

EU countries produce 50 % of high-oleaginous sunflower varieties (mainly in France, Spain, Hungary and Romania). At the same time, the high-oleic sunflower occupies in these regions only 2-3 % of the total area. In Ukraine it is 5% of the area. The production of this product is growing, although slowly: if 5 years ago it was about 7-8 % of the total mass of sunflower oil production, then now it is already 12 %.

Researchers predict a further growth of the segment: the projected annual world increase in high-oleaginous oil consumption should reach 6.5 %, the deficit for high oleic oil in the EU countries will increase threefold by 2020 [15].

The oil and fat complex is one of the leading economic sectors of the Ukrainian industry, primarily due to export potential. The demand for vegetable oils in the world is higher than the growth rate of gross product per capita. The development of fat and oil production in Ukraine has significant prospects for domestic consumption and meets the demand in the world market. This is due to a number of factors, which include: favorable soil and climatic conditions for oilseeds cultivation on the territory of Ukraine; reorientation in the nutrition structure of the population from animal fats to vegetable oils; steady price increase for traditional types of energy; a growing number of enterprises in the fat and oil industry of Ukraine, etc. In such conditions, the problem of competitiveness of enterprises in the fat and oil industry acquires a special urgency.

In order to strengthen the competitive positions of the fat and oil industry enterprises on the domestic and world markets, it is necessary to conduct a

number of activities, the main ones are: (1) technological re-equipment of production and application of modern technologies for oilseeds processing; (2) expanding the range of fat and oil products; (3) realization of science based development strategies of these enterprises; (4) automation and modernization of production processes in an enterprise; (5) implementation of energy-saving measures; (6) improving utility features and creating new (environmentally friendly) products; (7) creation and implementation of innovations at enterprises, etc.

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ВЗАЄМОЗВ'ЯЗОК КОНКУРЕНТНОЇ СТРУКТУРИ РИНКУ ТА ІННОВАЦІЙНОЇ АКТИВНОСТІ ФІРМ ОЛІЙНОЖИРОВОЇ ГАЛУЗІ

У статті розглянуто сучасний стан олійножирової галузі з позиції її конкурентної структури, визначено основні проблеми її розвитку в Україні. Встановлено, що олієжировий підкомплекс є одним із найперспективніших секторів національної економіки, який має потужний ресурсний потенціал. Він повною мірою забезпечує потреби внутрішнього ринку в олієжировій продукції та дозволяє здійснювати її експорт. Важлива роль цього сектора у формуванні фонду споживання, вирішенні проблем внутрішньої продовольчої безпеки, забезпеченні валютних та податкових надходжень, а також у вирішенні соціальних проблем через створення значної кількості робочих місць в олієжировому підкомплексі та суміжних галузях.

Галузь має високий рівень монополізації, більшість підприємств входять до складу великих корпоративних агропромислових формувань, агрохолдингів та транснаціональних компаній.

В останні роки конкуренція на світових ринках рослинних олій загострилася. Комплекс проблем, вирішення яких багато в чому визначатиме розвиток олійножирової галузі в довгостроковій перспективі, пов'язаний як зі збільшенням сировинної бази і розширенням виробництва різних видів олійних культур, так і з модернізацією і нарощуванням виробничих потужностей на основі досягнень науково-технічного прогресу, розробкою нової інноваційно-інвестиційної стратегії формування галузевих конкурентних переваг підприємств олійножирової промисловості шляхом удосконалення конкурентної політики.

Ключові слова: агробізнес, олійножирова промисловість, інноваційна активність, олігополістична структура, стратегія поведінки фірми, ціновий тренд, економічна кон'юнктура.

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ВЗАИМОСВЯЗЬ КОНКУРЕНТНОЙ СТРУКТУРЫ РЫНКА И ИННОВАЦИОННОЙ АКТИВНОСТИ ФИРМ МАСЛОЖИРОВОЙ ОТРАСЛИ

В статье рассмотрено современное состояние масложировой отрасли с позиции ее конкурентной структуры, определены основные проблемы ее развития в Украине. Установлено, что масложировой подкомплекс является одним из самых перспективных секторов национальной экономики, который имеет мощный ресурсный потенциал. Он в полной мере обеспечивает потребности внутреннего рынка и позволяет осуществлять экспорт продукции. Важна его роль в формировании фонда потребления, решении проблем внутренней продовольственной безопасности, обеспечении валютных и налоговых поступлений, в решении социальных задач путем создания значительного количества рабочих мест в масложировом подкомплексе и смежных отраслях.

Отрасль имеет высокий уровень монополизации, большинство предприятий входят в состав крупных корпоративных агропромышленных формирований, агрохолдингов и транснациональных компаний.

В последние годы конкуренция на мировых рынках растительного масла обострилась. Комплекс проблем, решение которых будет во многом определять развитие масложировой отрасли в долгосрочной перспективе, связан как с увеличением сырьевой базы и расширением производства различных видов масличных культур, так и с модернизацией и наращиванием производственных мощностей на основе достижений научно-технического прогресса, разработкой новой инновационно-инвестиционной стратегии формирования отраслевых

конкурентных преимуществ предприятий масло-жировой промышленности путем совершенствования конкурентной политики.

Ключевые слова: агробизнес, масложировая промышленность, инновационная активность, олигополистическая структура, стратегия поведения фирмы, ценовой тренд, экономическая конъюнктура.

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