



Ministry of Foreign Affairs

Multisectoral Market Study – Central Ukraine

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Multisector Market Study Central Ukraine



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Executive Summary

1. The purpose of the study is to raise the interest of Dutch companies to do business in Central Ukraine and therewith contribute to the private sector development of the region.

2. Sectors under investigation:

- agro-food and horticulture (production and processing of milk; production of greenhouse vegetables; production and processing of open field vegetables, fruit, berries, mushrooms; production and processing of potato);

- industry (textile, clothing and footwear industry, furniture production and metalworking industry);

- bioenergy (current and planned projects in bioenergy);

- production of machinery, equipment, materials for above mentioned agro-food and horticulture sectors (real and working sites), namely agricultural machinery, seeds and boilers, fertilizers, pesticides, refrigeration equipment, milking complexes, press machines for making juices);

- “joker” sector (selected among manufacturing sectors on the basis of regional specialization indicator): Vinnytsia and Zhytomyr regions - manufacture of wood and of wood products; Kyiv and Chernihiv regions – manufacture of paper and paper products; Kirovohrad region – manufacture of other machinery and equipment; Khmelnytskyi region – manufacture of electrical equipment; Cherkasy region - manufacture of basic pharmaceutical products and pharmaceutical preparations.

3. This study includes interviews with the governmental representatives of the selected regions, businesses and NGO’s operating in the selected sectors. They may reflect subjective opinions on the economic and political situation in Ukraine as of 2020 and might contradict with other expert opinions.

4. In the 7 Central Ukrainian regions’ economies, the positions of the studied sectors differ significantly: the largest share is observed in the Zhytomyr region - 8.7%, and the least - in the Kirovohrad region - 3.0%.

5. Sectors under analysis in the 7 Central Ukrainian regions under investigation include 10,385 companies employing 120,701 full-time employees. Sectors’ sales volume in 2018 amounted to UAH 80.6 billion, which was mainly generated by the Kyiv region (UAH 20.3 billion), the Vinnytsia region (UAH 17.3 billion) and the Cherkasy region (UAH 12.1 billion).

6. In terms of sales value, the largest sectors are dairy products production (UAH 27 454 million or 34%), metalworking (UAH 16 344 million or 20%) and milk production (UAH 10 883 million or 14%). Together, these sectors accounted for almost 68% of sales.

7. The sectors under study face some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (43%), inaccessibility of funding (41%) and shortage of workers (36%).

8. There is a significant interest for cooperation with Dutch business - 91% of the surveyed companies show interest in cooperation with Dutch companies, first of all in entering foreign markets (57%), obtaining new technologies (24%), and receiving financing (22%).

9. The fruits and berries production sector includes 529 companies employing 5,059 full-time employees (excluding seasonal workers). The sector's sales volume in 2018 amounted to UAH 1 104 million, which was mainly generated by the Vinnytsia region (UAH 681 million) and the Khmelnytskyi region (UAH 160 million).

10. The vegetable production sector includes 484 companies employing 3,755 full-time employees (excluding seasonal workers). The sector's sales volume in 2018 amounted to UAH 3.9 billion, which was mainly generated by the Kyiv region (UAH 1 222 million) and the Cherkasy region (UAH 1 105 million).

11. The milk production sector includes 386 companies, employing 17,808 full-time employees. The sector's sales volume in 2018 amounted to UAH 10.9 billion, which was mainly generated by the Cherkasy region (UAH 2.52 billion), the Kyiv region (UAH 2.0 billion) and the Chernihiv region (UAH 2.0 billion).

12. The milk processing sector includes 224 companies, employing 22.1 thousand full-time employees. The sector's sales volume in 2018 amounted UAH 27.4 billion, which was mainly generated by the Vinnytsia region (UAH 8.9 billion), the Zhytomyr region (UAH 4.9 billion) and the Kyiv region (UAH 4.7 billion).

13. The fruit and vegetable processing sector includes 133 companies employing 3,686 full-time employees. The sector's sales volume in 2018 amounted to UAH 5.7 billion, which was mainly generated by the Vinnytsia region (UAH 2 147 million) and the Kyiv region (UAH 1 520 million).

14. The textile, clothing and footwear sector includes 3,700 companies employing 31,984 full-time employees. The sector's sales volume in 2018 amounted to UAH 5.12 billion, which was mainly generated by the Zhytomyr region (UAH 2.2 billion), the Khmelnytskyi region (UAH 1.9 billion) and the Kyiv region (UAH 1.6 billion).

15. The metalworking sector includes 2,558 companies employing 22,184 full-time employees. The sector's sales volume in 2018 amounted to UAH 16.3 billion, which was mainly generated by the Kyiv region (UAH 7.0 billion), the Vinnytsia region (UAH 2.6 billion) and the Zhytomyr region (UAH 2.5 billion).

16. The furniture sector includes 2,371 companies, employing 14,117 full-time employees. The sector's sales volume in 2018 amounted to UAH 6.0 billion, which was mainly generated by the

Kyiv region (UAH 2.21 billion), the Khmelnytskyi region (UAH 1.14 billion) and the Cherkasy region (UAH 0.91 billion).

17. The existing bioenergy potential of the Central Ukraine regions is not sufficiently used by present market participants. There is a significant market niche for new players.

18. In the 7 Central Ukrainian regions there are 75 producers of equipment and components for agro-sectors and bioenergy production, mainly agricultural soil machinery producers (21 companies), agricultural self-loading or unloading trailers (10 companies) and root harvesting machines (7 companies).

19. According to the researched sectors, there are the following number of organizations who either receive grants or participate in donor programs: Khmelnytskyi – 4, Cherkasy – 2, Kyiv region – 7, Zhytomyr – 6, Vinnytsia – 4, Chernihiv – 2, Kyrovograd – 1. Average evaluation value in 7 Central Ukrainian regions of foreign business' feedback on local authorities' support – 2,76 (Scale from 1 to 5 (1 = Poor, 2 = Fair, 3 = Good, 4 = Very good, 5 = Excellent))

20. Promising areas of cooperation by sectors are:

- the milk production and processing sector: development of dairy farms equipped in accordance with European standards for small producers;
- the fruits and berries production and processing sector: certified planting material, growing technologies, infrastructure for storage and processing of products;
- industrial sectors: assistance in integrating into existing value-added chains through the certification of existing production, technological upgrading and the search for foreign partners;
- bioenergy: use of existing potential of forest and agrarian biomass; modern energy efficiency solutions.

1. Profile of sectors under investigation. Important indicators and characteristics

1.1. Characteristic of companies of the sectors under study

In Central Ukrainian regions, there are 10 385 enterprises representing sectors under analysis, 2 765 of which are legal entities (27%), and 7 620 - individual entrepreneurs (73%).

The largest number of companies operates in Kyiv region (2 635 units or 25%), and the least - in Kirovohrad region (606 units or 6%).

The sectors are employing 120 701 full-time employees, including 100 181 in legal entities (83%), and 20 520 are employed by individual entrepreneurs (about 17%). The sectors' leader by the number of employees is Vinnytsia region (23 499 people or 19% of total employment), while the smallest employment in the sector is in Kirovohrad region (5 792 people or 5%).

Table 1.1. Number of functioning enterprises and employment in sectors under study in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	359	1 033	1 392	14 812	2 916	17 728
Chernihiv	309	729	1 038	11 970	1 613	13 583
Khmelnyskyi	412	1 543	1 955	14 477	5 101	19 578
Kirovohrad	153	453	606	4 668	1 124	5 792
Kyiv	773	1 862	2 635	18 524	4 392	22 916
Vinnytsia	421	1 225	1 646	20 507	2 992	23 499
Zhytomyr	338	775	1 113	15 223	2 382	17 605
Total	2 765	7 620	10 385	100 181	20 520	120 701

Sources: State Statistics Service of Ukraine

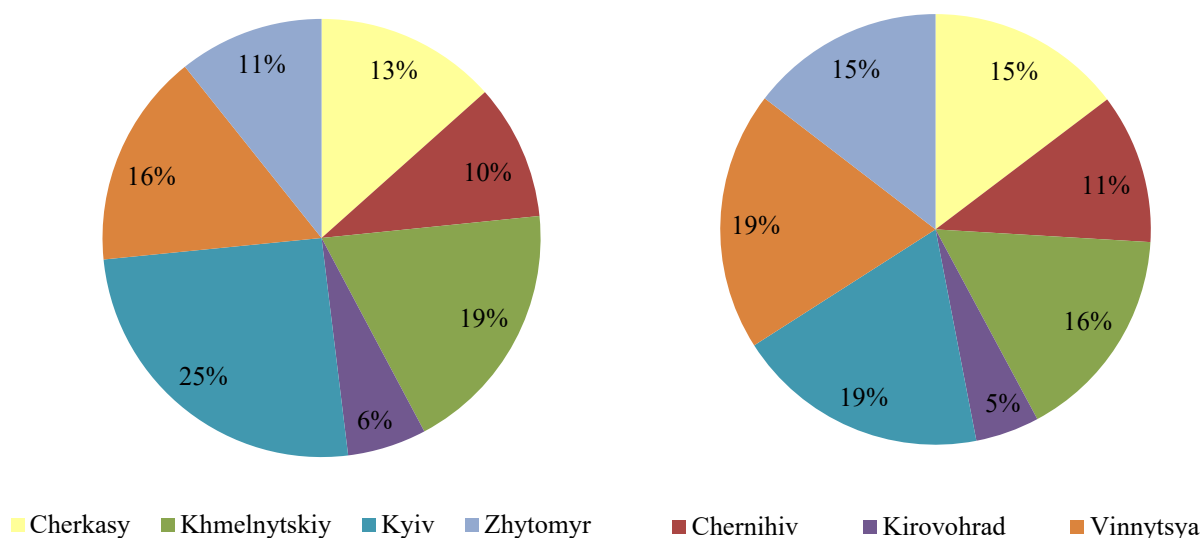


Fig. 1.1. Breakdown of agro-food sectors enterprises by regions

Fig. 1.2. Regional employment structure in agro-food sectors

The largest number of companies is functioning in the textile, clothing and footwear industry (3 700 units or 35%), metalworking (2 558 units or 25%) and furniture production (2 371 units or 23%).

Textile industry, dairy products industry and metalworking dominate in employment structure – these sectors account for about 63% of all employees in the surveyed sectors.

Table 1.2. Number of functioning enterprises and employment in sectors under study in 2018

Sector	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Furniture production	313	2 058	2 371	8 656	5 461	14 117
Manufacture of dairy products	123	101	224	21 793	315	22 108
Metalworking	703	1 855	2 558	18 266	3 918	22 184
Processing and preserving of fruit and vegetables	79	54	133	3 265	421	3 686
Production of fruits and berries	361	168	529	4 804	255	5 059
Production of vegetables and mushrooms	230	254	484	3 348	407	3 755
Production of milk	333	53	386	17 687	121	17 808
Textile, clothing and footwear industry	623	3 077	3 700	22 362	9 622	31 984
Total	2 765	7 620	10 385	100 181	20 520	120 701

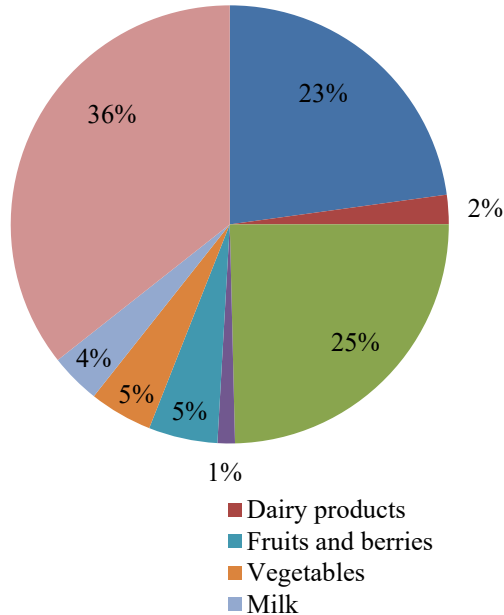


Fig. 1.3. Breakdown of enterprises in sectors under study by regions

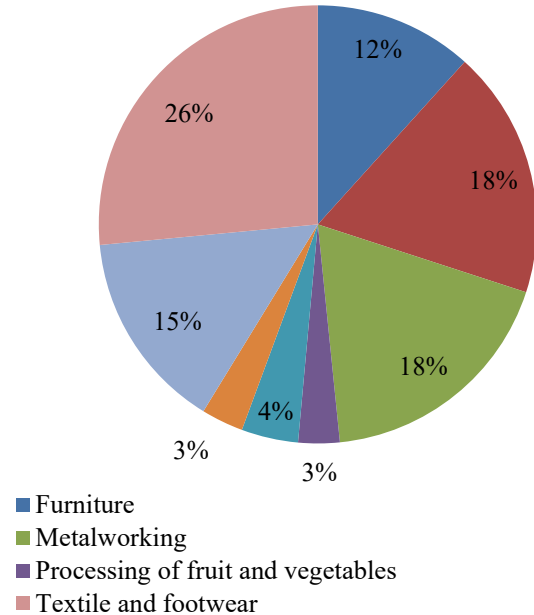


Fig. 1.4. Regional employment structure in sectors under study

1.2. Volume of sales by sectors and regions. Top companies

In 2018, sales volume of enterprises in the sectors under study amounted to about UAH 80.6 bln (EUR 2.5 bln.), of which UAH 76.5 bln (EUR 2.4 bln.) were generated by legal entities (95%), and the rest UAH 4.1 bln. (EUR 0.1 bln.) – by individual entrepreneurs (about 5%).

In the regional structure, the leaders are Kyiv region (UAH 20 296 million or 25% of sales), Vinnytsia region (UAH 17 266 million or 21%) and Cherkasy region (UAH 12 054 million or 15%). Together, these regions account for almost 61% of sales among 7 Central Ukrainian regions under investigation.

Table 1.3. The volume of sales in sectors under study in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	11 511	543	12 054
Chernihiv	7 946	345	8 291
Khmelnyskyi	7 387	736	8 123
Kirovohrad	3 111	188	3 299
Kyiv	19 194	1 103	20 296
Vinnytsia	16 519	747	17 266
Zhytomyr	10 788	449	11 237
Total	76 456	4 111	80 566

Sources: State Statistics Service of Ukraine

In terms of sales value, the largest sectors are dairy products production (UAH 27 454 million or 34%), metalworking (UAH 16 344 million or 20%) and milk production (UAH 10 883 million or 14%). Together, these sectors accounted for almost 68% of sales in 2018.

Table 1.4. The volume of sales in sectors under study in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Furniture production	4 867	1 154	6 021
Manufacture of dairy products	27 404	50	27 454
Metalworking	15 040	1 304	16 344
Processing and preserving of fruit and vegetables	5 581	88	5 669
Production of fruits and berries	1 050	54	1 104
Production of vegetables and mushrooms	3 802	130	3 931
Production of milk	10 844	39	10 883
Textile, clothing and footwear industry	7 867	1 292	9 159
Total	76 456	4 111	80 566

Sources: State Statistics Service of Ukraine

In the economies of 7 Central Ukrainian regions, the positions of the studied sectors differ significantly: the largest share is observed in Zhytomyr region - 8.7%, and the least - in the Kirovohrad region - 3.0%.

Table 1.5. Positions of sectors under study in regions' economy in 2018

Sector	Sales in sectors under study, mln. UAH	Total sales in region, mln. UAH	Share of sectors under study in region's economy, %
Cherkasy	12 054	198 145	6.1
Chernihiv	8 291	117 909	7.0
Khmelnyskiy	8 123	126 669	6.4
Kirovohrad	3 299	111 073	3.0
Kyiv	20 296	535 372	3.8
Vinnytsia	17 266	200 214	8.6
Zhytomyr	11 237	129 627	8.7
Total	80 566	1 419 007	5.7

Sources: State Statistics Service of Ukraine

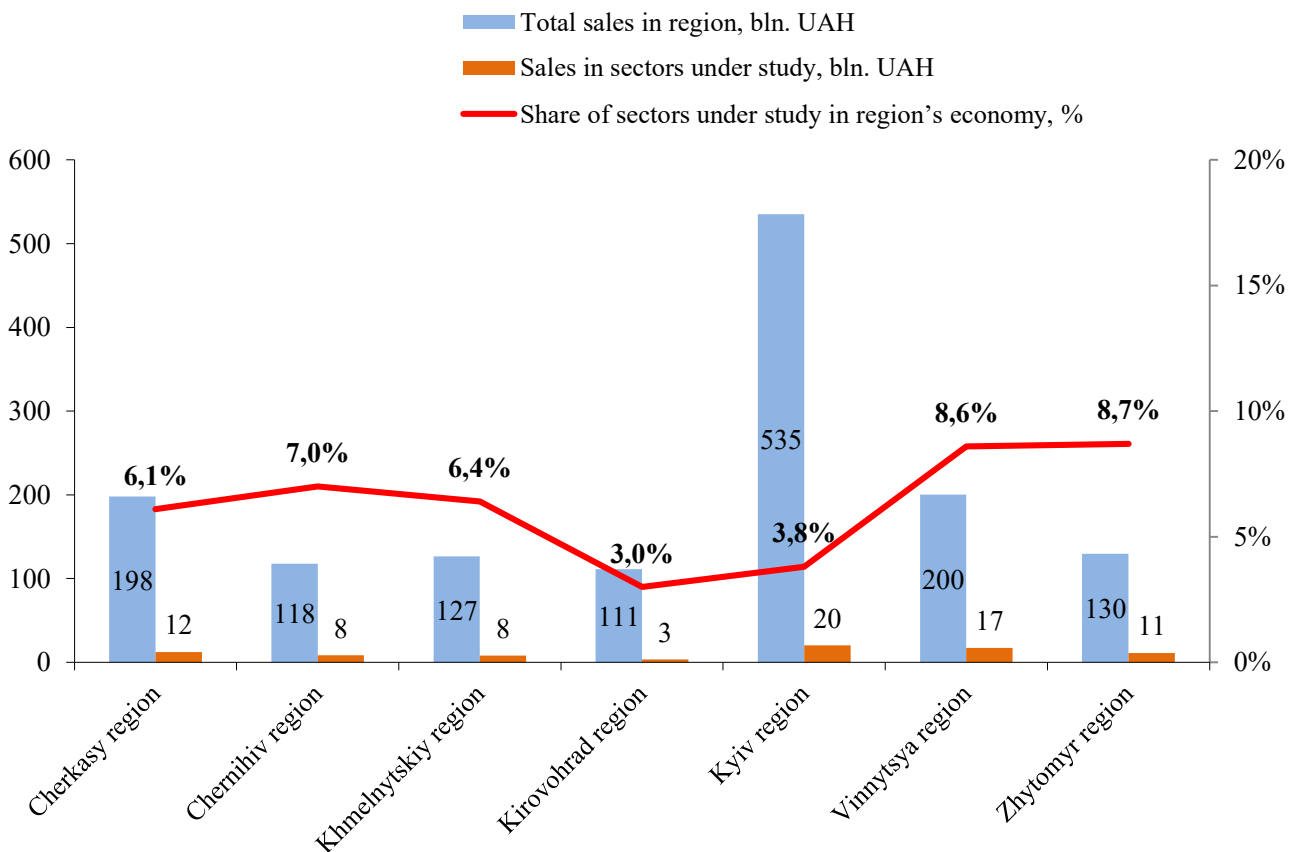


Fig. 1.5. Share of sectors under study in region's economy in 2018

Among 7 Central Ukrainian regions under investigation, **Kyiv region** is leading in 3 out of 8 sectors under study. It is the largest in terms of sales of furniture, metalworking products and growing of vegetables.

Vinnitsia region is also leading in 3 out of 8 sectors under study, namely dairy products, fruit and berries and processing of fruits and vegetables.

Cherkasy region is the leader in sales of milk.

Zhytomyr region is the largest in sales of textile, clothing and footwear products.

Table 1.6. Regional sales in sectors under study in 2018, mln. UAH

Sector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Furniture production	909	203	1 143	732	2 212	485	336	6 021
Manufacture of dairy products	3 745	2 449	1 867	865	4 728	8 859	4 942	27 454
Metalworking	1 209	1 529	1 086	498	6 947	2 622	2 453	16 344
Processing and preserving of fruit and vegetables	1 377	280	77	256	1 520	2 147	11	5 669
Production of fruits and berries	56	14	160	7	56	681	130	1 104
Production of vegetables and mushrooms	1 105	275	500	68	1 222	541	221	3 931
Production of milk	2 519	1 999	1 396	627	2 017	1 434	890	10 883
Textile, clothing and footwear industry	1 134	1 541	1 893	245	1 594	497	2 256	9 159
Total	12 054	8 291	8 123	3 299	20 296	17 266	11 237	80 566

Sources: State Statistics Service of Ukraine

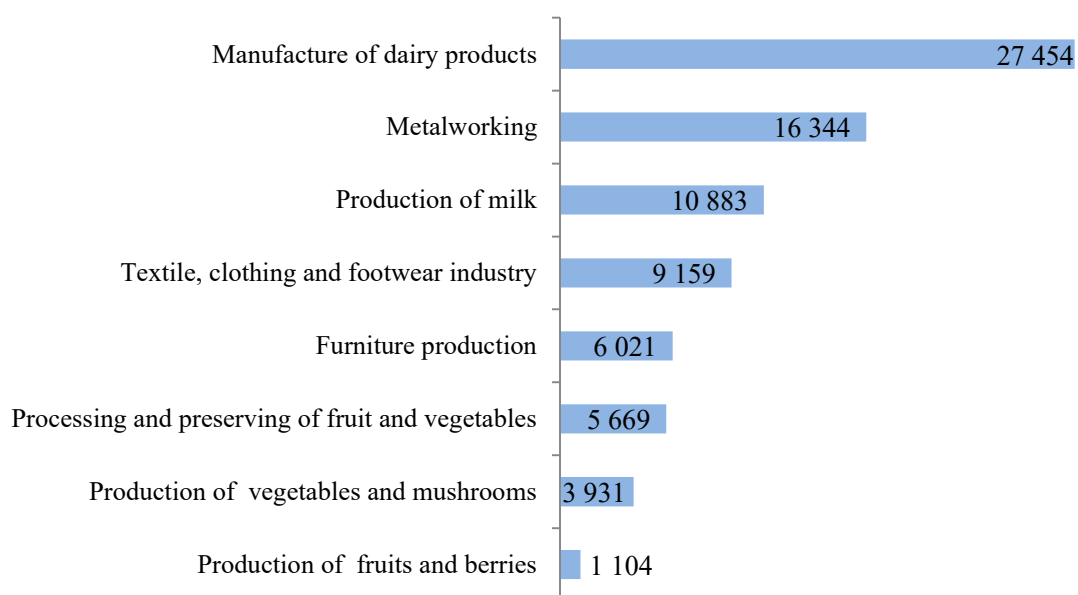


Fig. 1.6. Sectoral sales in sectors under study in 2018, mln. UAH

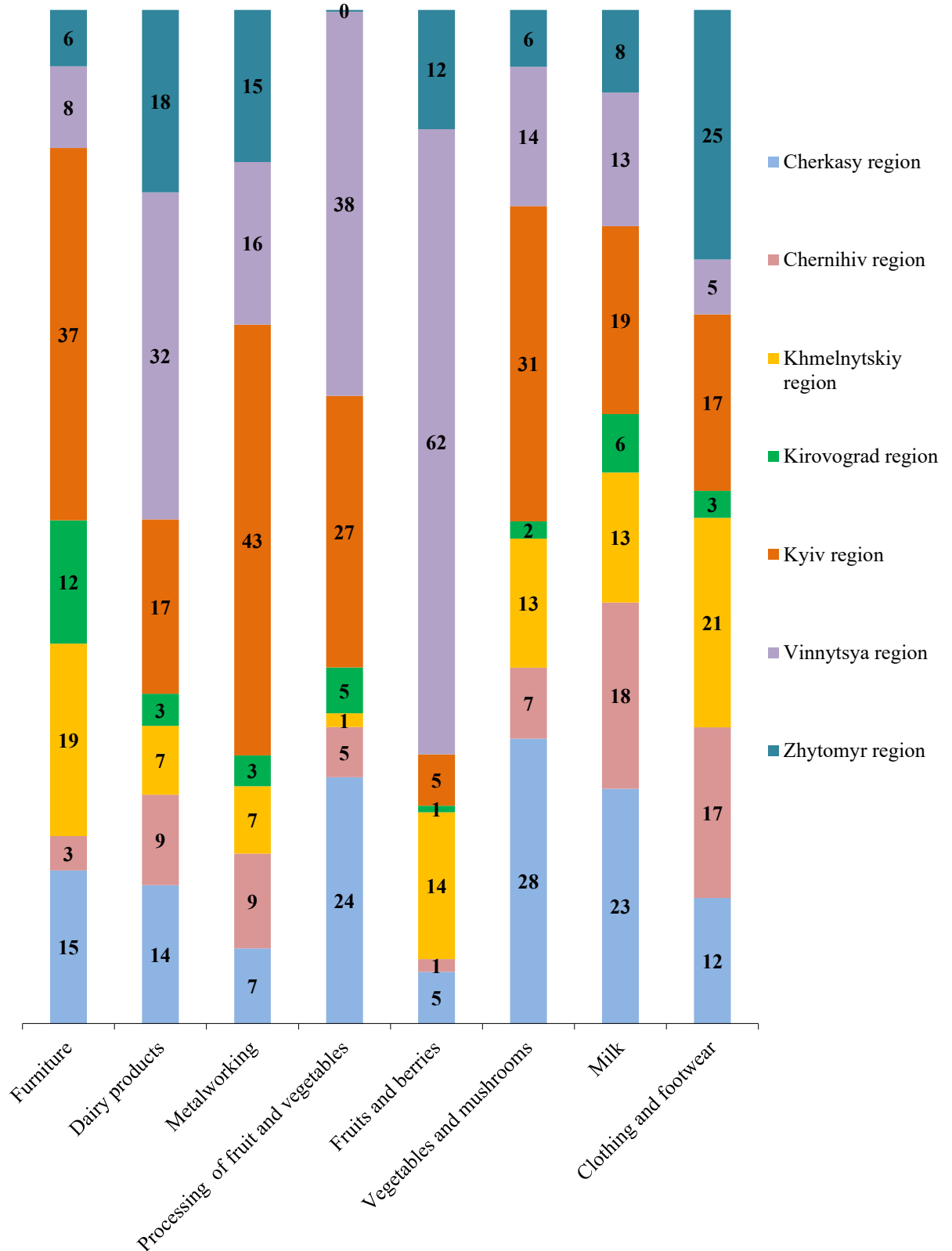


Fig. 1.7. Regional sales in sectors under study in 2018, %

The largest companies in 7 Central Ukrainian regions under investigation are Food Development LLC, “Yagotynsky Butter Plant” LLC and Lustdorf Company LLC.

Table 1.7. Leading companies in sectors under investigation

ID code	Company name (English)	Company name (Ukrainian)	Sector
40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	Manufacture of dairy products
446003	“Yagotynsky Butter Plant” ALC	ТДВ “ЯГОТИНСЬКИЙ маслозавод”	Manufacture of dairy products
23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	Manufacture of dairy products
182863	PJSC “Zhytomyr Butter Plant”	ПАТ “Житомирський маслозавод”	Manufacture of dairy products
418018	PJSC “Vinnytsia dairy plant” Roshen”	ПрАТ “Вінницький молочний завод “Рошен”	Manufacture of dairy products
32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	Metalworking
447853	JSC “Yuriya”	ПрАТ “Юрія”	Manufacture of dairy products
31952591	Subsidiary enterprise “Starokostiantyniv Dairy Plant”	Дочірнє підприємство “Старокостянтинівський молочний завод”	Manufacture of dairy products
447824	“Zolotonosha butter factory” ALC	ТДВ “Золотоніський маслоробний комбінат”	Manufacture of dairy products
20118399	“Agrana Fruit Ukraine” LLC	ТОВ “Агрона Фрут Україна”	Processing and preserving of fruit and vegetables

Regional distribution of the largest companies in the sector are shown in the Table 1.8

Table 1.8. Top-10 companies in sectors under investigation by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues, mln. UAH
Vinnytsia	40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	Manufacture of dairy products	more than 100
	23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	Manufacture of dairy products	more than 100
	418018	PJSC “Vinnytsia dairy plant” Roshen”	ПрАТ “Вінницький молочний завод “Рошен”	Manufacture of dairy products	more than 100
	20118399	“Agrana Fruit Ukraine” LLC	ТОВ “Аграна Фрут Україна”	Processing and preserving of fruit and vegetables	more than 100
	32976889	PEK Energo LLC	ТОВ “ПЕК Енерго”	Metalworking	more than 100
	3567397	Plasmatech PJSC	ПАТ “Плазматек”	Metalworking	more than 100
	41104967	Podillya Agropduct LLC	ТОВ “Поділля Агропродукт”	Production of milk	more than 100
	424444	“Litinsky dairy plant” LLC	ТОВ “Літинський молочний завод”	Manufacture of dairy products	more than 100
	38030199	“Khmilnytsky factory of powdered skim milk” Milk Visit LLC	ТОВ “Хмільницький Завод Сухого Знежиреного Молока “Молочний Візит”	Manufacture of dairy products	more than 100
	32320552	Eco-Sphere LLC	ТОВ “Еко-Сфера”	Processing and preserving of fruit and vegetables	more than 100
Kyiv	446003	“Yagotynsky Butter Plant” ALC	ТДВ “Яготинський маслозавод”	Manufacture of dairy products	more than 100
	32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	Metalworking	more than 100
	35234409	“Alutekh-K” LLC	ТОВ “Алютех-К”	Metalworking	more than 100
	36832644	Lux Chips LLC	ТОВ “Чіпси Люкс”	Processing and preserving of fruit and vegetables	more than 100
	34099131	“Ukrainian Dairy Company” LLC	ТОВ “Українська Молочна Компанія”	Production of milk	more than 100
	445937	PJSC Wimm-Bill-Dann Ukraine	ПрАТ “Вімм-Білл-Данн Україна”	Manufacture of dairy products	more than 100
	5528361	PJSC “Greenhouse” Combine	ПрАТ “комбінат “Тепличний”	Production of vegetables and mushrooms	more than 100
	31387134	“Ukrug” LLC	ТОВ “Укрюг”	Furniture production	more than 100
	445914	Obukhov Dairy Factory JSC	ПрАТ “Обухівський молочний завод”	Manufacture of dairy products	more than 100
	31320656	Agrosvit Agricultural LLC	Сільськогосподарське ТОВ “Агросвіт”	Production of milk	more than 100
Khmelnyskiy	31952591	Subsidiary enterprise “Starokostiantyniv Dairy Plant”	Дочірнє підприємство “Старокостянтинівський молочний завод”	Manufacture of dairy products	more than 100
	35750435	T-Style LLC	ТОВ “Т-Стиль”	Textile, clothing and footwear industry	more than 100
	21328928	Karat LLC	ТОВ “Карат”	Textile, clothing and footwear industry	more than 100
	447729	Khmelnyskyi Maslosyrbaza PJSC	ПрАТ “Хмельницька Маслосирбаза”	Manufacture of dairy products	more than 100
	32065083	Aqua-Rodos LLC	ТОВ “Аква- Родос “	Furniture production	more than 100
	23841050	Commercial and Industrial Enterprise “Universal” LLC	ТОВ Торгово-Промислове підприємство “Універсал”	Textile, clothing and footwear industry	more than 100
	37971230	Jivaldis Private Enterprise	Приватне підприємство “Дживальдіс”	Manufacture of dairy products	more than 100
	14307831	State Enterprise “Krasyliv Aggregate Plant”	Державне підприємство “Красилівський Агрегатний Завод”	Metalworking	more than 100

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	39757078	SK Promin LLC	ТОВ “СК Промінь”	Production of milk	more than 100
	14146210	PJSC “Derazhnyansky Dairy Factory”	ПрАТ “Деражнянський молочний завод”	Manufacture of dairy products	more than 100
Cherkasy	447853	JSC “Yuriya”	ПрАТ “Юрія”	Manufacture of dairy products	more than 100
	447824	“Zolotonosha butter factory” ALC	ТДВ “Золотоніський маслоробний комбінат”	Manufacture of dairy products	more than 100
	447818	PJSC “Zvenygorodka Cheese Making Plant”	ПрАТ “Звенигородський сироробний комбінат”	Manufacture of dairy products	more than 100
	2779234	Private-leasing agricultural enterprise “Uman greenhouse complex”	Приватно-орендне сільськогосподарське підприємство “Уманський Тепличний комбінат”	Production of vegetables and mushrooms	more than 100
	306851	PJSC “Cherkasy Silk Mill”	ПрАТ “Черкаський Шовковий комбінат”	Textile, clothing and footwear industry	more than 100
	3366434	PJSC “World of Furniture-Ukraine”	ПрАТ “Світ Меблів-Україна”	Furniture production	more than 100
	31561188	Agricultural LLC “Agroko”	Сільськогосподарське ТОВ “Агроко”	Production of milk	more than 100
	3793159	Agricultural “Agro firm “Mayak” LLC	Сільськогосподарське ТОВ “Агрофірма “Маяк”	Production of milk	more than 100
	36584037	“Metal Invest” Company LLC	ТОВ “Компанія “Метал Інвест”	Metalworking	more than 100
	3793107	Pleshkani Private Agricultural Enterprise	Приватне сільськогосподарське підприємство “Плешкані”	Production of milk	more than 100
Zhytomyr	182863	PJSC “Zhytomyr Butter Plant”	ПАТ “Житомирський маслозавод”	Manufacture of dairy products	more than 100
	30873067	LLC “Andrushivsky Creamery”	ТОВ “Андрушівський маслосирзавод”	Manufacture of dairy products	more than 100
	32265502	Foreign enterprise Eurogold Industries Ltd.	Іноземне підприємство “Євроголд Індестріз лтд”	Metalworking	more than 100
	31450478	Three Bears LLC	ТОВ “Три Ведмеді”	Manufacture of dairy products	more than 100
	20428705	LLC “Greif Flexibils Ukraine”	ТОВ “Грайф Флексіблс Україна”	Textile, clothing and footwear industry	more than 100
	35694381	LLC “Rihalsk factory of milk powder”	ТОВ “Рихальський завод сухого молока”	Manufacture of dairy products	more than 100
	32282161	Renet Private Enterprise	Приватне підприємство “Ренет “	Manufacture of dairy products	more than 100
	37107815	LLC “Galiyevsky Maslozavod”	ТОВ “Галіївський Маслозавод”	Manufacture of dairy products	more than 100
	13560947	Impak Private Enterprise	Приватне підприємство “Імпак”	Production of vegetables and mushrooms	more than 100
	38107182	Organic Milk LLC	ТОВ “Органік Мілк”	Manufacture of dairy products	more than 100
Kirovohrad	39503720	Non-Governmental Organization of Domestic Producer Support Association “Firm Laska”	Підприємство об’єднання громадян “Фірма Ласка” громадської організації “Асоціація підтримки вітчизняного товаровиробника”	Manufacture of dairy products	more than 100
	33698667	LLC “Katerynoslav Furniture Workshops”	ТОВ “Катеринославські меблеві майстерні”	Furniture production	more than 100
	40236151	LLC “Svetlovodsk butter and cheese factory”	ТОВ “Світловодський маслосирзавод”	Manufacture of dairy products	more than 100
	5526770	Progress LLC	ТОВ “Прогрес”	Production of milk	more than 100
	24744314	LLC “OLTO”	ТОВ Фірма “ОЛТО”	Production of milk	more than 100
	5502700	JSC “Zoryanka” Garment Factory	ПрАТ “Швейна фабрика “Зорянка”	Textile, clothing and footwear industry	50-100
	40945923	“Svetlovodsk Plant of Metal Structures” LLC	ТОВ “Світловодський завод металевих конструкцій”	Metalworking	50-100
	34813572	“Kirovohrad Tool Plant” Lezo” LLC	ТОВ “Кіровоградський інструментальний завод “Лезо”	Metalworking	50-100

ITFC - Ukrainian Industry Expertise

	13748444	Private small business research and production firm “KIT”	Приватне мале підприємство науково-виробнича фірма “КІТ”	Furniture production	50-100
	33254224	“Ukrpromptara” LLC	ТОВ “Укрпромтара”	Metalworking	25-50
Chernihiv	381152	JSC “Ichnia Milk Canning Factory”	ПрАТ “Ічнянський молочно-консервний комбінат”	Manufacture of dairy products	more than 100
	40848765	TMM-Energobud Management LLC	ТОВ “ТММ-Енергобуд Менеджмент”	Metalworking	more than 100
	448077	PJSC “Novgorod-Siversky cheese factory”	ПрАТ “Новгород-Сіверський сирзавод”	Manufacture of dairy products	more than 100
	41212435	LLC “Ichnia Dry Milk and Butter Factory”	ТОВ “Ічнянський завод сухого молока та масла”	Manufacture of dairy products	more than 100
	5388983	PJSC “Kulikovo Milk”	ПрАТ “Куликівське Молоко “	Manufacture of dairy products	more than 100
	32946641	LLC Novofil	ТОВ “Новофіл”	Textile, clothing and footwear industry	more than 100
	33167561	Alitoni LLC	ТОВ “Алітоні”	Textile, clothing and footwear industry	more than 100
	34593914	Niva 2008 LLC	ТОВ “Нива 2008”	Production of milk	more than 100
	24842666	Agricultural LLC “Nadiya”	Сільськогосподарське ТОВ “Надія”	Production of milk	more than 100
	2078868	LLC “Rozhnivka-Agro”	ТОВ “Рожнівка-Агро”	Production of milk	more than 100

1.3. Export by sectors and regions

In 2018, the volume of exports in sectors under study in 7 Central Ukrainian regions under investigation amounted to about USD 716.7 million, of which almost 61% was generated by Vinnytsia region (USD 162 million), Zhytomyr region (USD 142 million) and Kyiv region (USD 127 million).

Textile, clothing and footwear industry, metalworking and dairy products dominate in the commodity structure of exports (72% of total exports).

Table 1.9. Regional pattern of export of sectors under study in 2018, thousand USD

Sector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Furniture production	15 186	691	23 006	1 508	16 264	3 301	8 520	68 477
Manufacture of dairy products	7 085	15 868	12 881		9 657	62 071	11 689	119 251
Metalworking	4 448	20 826	5 569	1 633	47 659	15 007	38 465	133 607
Processing and preserving of fruit and vegetables	15 296	1 105	14 718	644	4 560	36 029	7 698	80 051
Production of fruits and berries	12	648	281	122	421	4 326	502	6 310
Production of vegetables and mushrooms	8 750	10 363	5 093	1 227	8 838	7 064	3 534	44 869
Textile, clothing and footwear industry	14 874	66 976	30 431	5 587	39 573	34 596	72 147	264 184
Total	65 650	116 477	91 980	10 722	126 973	162 393	142 555	716 750

Sources: State Statistics Service of Ukraine

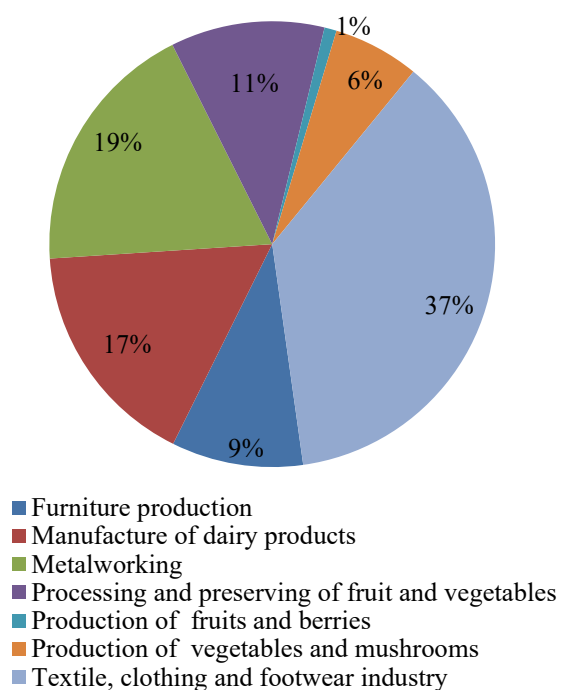


Fig. 1.8. Export goods structure of sectors under study by subsectors

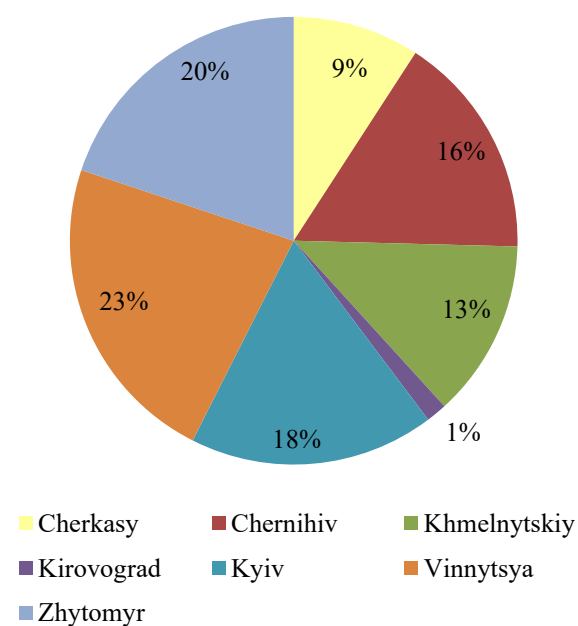


Fig. 1.9. Regional breakdown of sectors under study products export

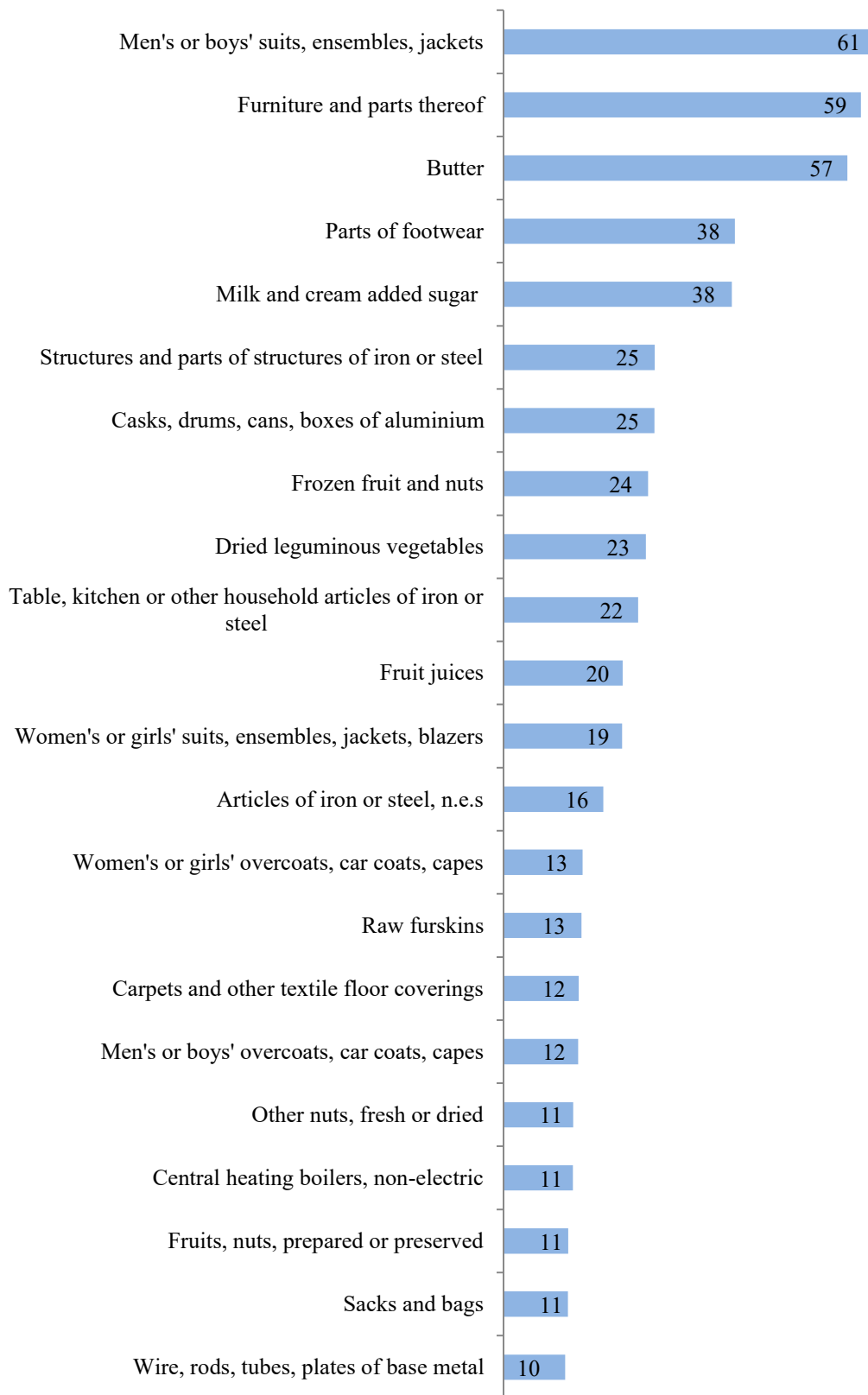


Fig. 1.10. Export goods structure of sectors under study by product groups, mln. USD

Share of export in sales

The highest level of export orientation is in textile, clothing and footwear industry (78%), processing of fruits and vegetables (38%), vegetables and mushrooms production (31%) and furniture production (31%).

In other sectors, the share of foreign sales markets in sales is either low (less than 30% - metalworking), or insignificant (less than 20% - dairy and fruits and berries production).

Excess of exports over sales in textile, clothing and footwear industry is due to the fact that the largest companies in these sectors are working on “give and take basis” scheme, i. e. processing imported raw materials (companies report in sales only the value of the service provided, while for exports - the final value of the product (imported raw materials + cost of services). High shares of fruits and vegetables exports in sales is explained of exports of products produced in other regions.

Table 1.10. The share of exports in the sales of sectors under study in 2018 by regions, %

Sector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Furniture production	45	9	55	6	20	19	69	31
Manufacture of dairy products	5	18	19	0	6	19	6	12
Metalworking	10	37	14	9	19	16	43	22
Processing and preserving of fruit and vegetables	30	11	517	7	8	46	1908	38
Production of fruits and berries	1	123	5	47	20	17	11	16
Production of vegetables and mushrooms	22	102	28	49	20	36	43	31
Production of milk	0	0	0	0	0	0	0	0
Textile, clothing and footwear industry	36	118	44	62	68	189	87	78
Total	15	38	31	9	17	26	35	24

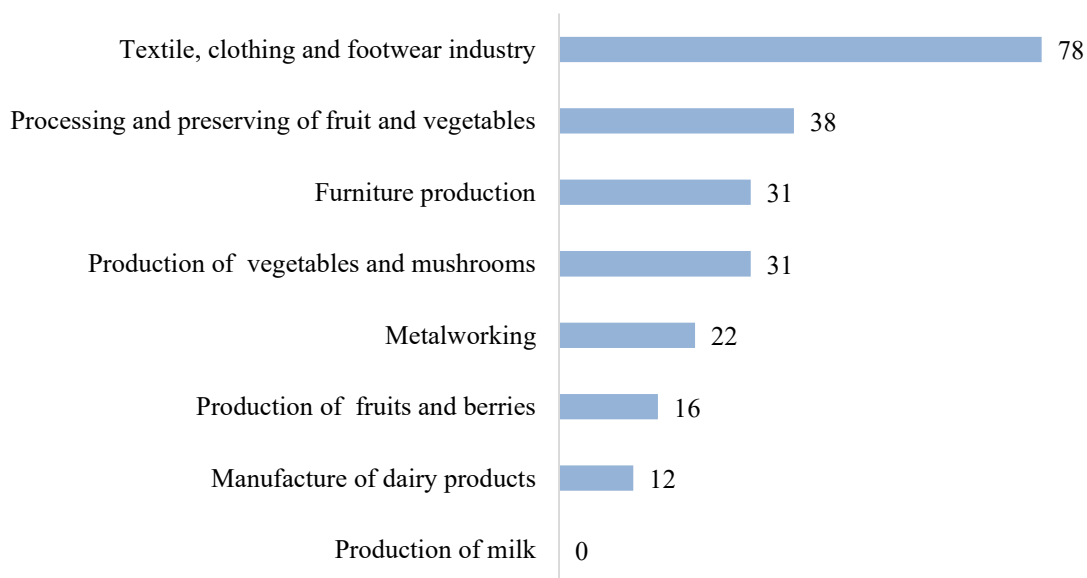


Fig. 1.11. The level of export-oriented production in sectors under study in 2018, %

1.4. The enterprises with FDI, international grants and participants of donor programs

Enterprises with foreign direct investment (FDI)

As of the end of 2018, the total volume of FDI in 7 Central Ukrainian regions in question under research exceeds \$ 3.1 billion. The FDI was received by 2,172 companies (Tab. 1.11). The largest FDI inflow was in Kyiv region (\$1591 million or 67%), the volume of FDI in the other regions is much smaller. The share of 7 regions in total FDI in Ukraine is 9.8%.

In 7 Central regions, FDI came from more than 60 countries of the world. The Netherlands ranked 3-d following Cyprus and Poland. The total volume of FDI from the Netherlands in 7 regions amounted to 760.6 million dollars (24.6% of total FDI inflow). The Dutch FDI was made to 87 companies. Most of the Dutch investments came in Kyiv region (\$1591.6 million), and least - in Kirovohrad (only \$ 3.7 million). The share of 7 regions in total FDI from the Netherlands makes 11.9%.

Table 1.11. - The volume of FDI in 7 Central Ukrainian regions under investigation

Indicator	FDI volume, million USD	Number of enterprises with FDI
Vinnitsia region (as of December 31, 2018)	223.3	336
including from the Netherlands	7.0	13
Kyiv region (as of December 31, 2018)	1591.6	758
including from the Netherlands	587.0	35
Khmelnyskyi region (as of December 31, 2018)	199.5	222
including from the Netherlands	136.9	8
Cherkasy region (as of December 31, 2018)	334.3	227
including from the Netherlands	4.8	11
Chernihiv region (as of December 31, 2018)	433.7	149
including from the Netherlands	7.2	5
Zhytomyr region (as of December 31, 2018)	237.4	341
including from the Netherlands	14.0	9
Kirovohrad region (as of December 31, 2018)	69.3	139
including from the Netherlands	3.7	6
Total 7 areas	3089.1	2172
including from the Netherlands	760.6	87
Total Ukraine	31 606.4	
including from the Netherlands	6 395	
The share of 7 regions in FDI in Ukraine, %	9.8	
including from the Netherlands, %	11.9	

Sources: State Statistics Service of Ukraine, regional statistical offices

As of December 31, 2018, in Vinnytsia region, the volume of FDI amounted to \$ 223.3 million (Table 1.12). Main areas of investment are processing industry (\$ 164.4 million), agriculture (\$ 18.4 million) and real estate activities (\$ 7.5 million).

Table 1.12. The structure of FDI by types of economic activity in Vinnytsia region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		223 349.1	100.0
Agriculture, forestry and fishing	A	18 436.5	8.2
Industry	B+C+D+E	181 367.7	81.2
mining and quarrying	B	15 234.2	6.8
processing industry	C	164 474.0	73.6
electricity, gas, steam and air conditioning supply	D	1 620.9	0.7
water supply; sewerage; waste management and remediation activities	E	38.6	0.0
Construction	F	166.0	0.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	6 780.4	3.0
Transporting and storage	H	4 307.0	1.9
Accommodation and food service activities	I	... ¹	... ¹
Information and communication	J	2 436.5	1.1
Financial and insurance activities	K	-	-
Real estate activities	L	7 590.2	3.4
Professional, scientific and technical activities	M	1 232.9	0.5
Administrative and support service activities	N	715.0	0.3
Public administration and defence; compulsory social security	O	-	-
Education	P	... ¹	... ¹
Human health and social work activities	Q		
Arts, entertainment and recreation	R	... ¹	... ¹
Other services activities	S	... ¹	... ¹

¹ The data is not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information

Source: Regional Statistics Department

As of December 31, 2018, in Kyiv region, the volume of FDI amounted to \$ 1591.6 million (Table 1.13). The main investment areas are processing industry (\$ 838.8 million), trade (\$ 190.5 million) and real estate activities (\$ 170.6 million). Also, large investments were made in transporting and storage and in agriculture.

Table 1.13. The structure of FDI by types of economic activity in Kyiv region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		1 591 581.6	100.0
Agriculture, forestry and fishing	A	72 551.8	4.5
Industry	B+C+D+E	858 778.8	53.9
mining and quarrying	B	2 845.0	0.2
processing industry	C	838 780.4	52.7
electricity, gas, steam and air conditioning supply	D	14 970.8	0.9
water supply; sewerage; waste management and remediation activities	E	2 182.6	0.2
Construction	F	27 558.7	1.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	190 551.1	11.9
Transporting and storage	H	124 499.4	7.8
Accommodation and food service activities	I	20 214.9	1.3
Information and communication	J	... ¹	... ¹
Financial and insurance activities	K	8 182.3	0.5
Real estate activities	L	170 637.3	10.7
Professional, scientific and technical activities	M	43 585.9	2.7
Administrative and support service activities	N	60 017.3	3.8
Public administration and defence; compulsory social security	O	8 182.3	0.5
Education	P	-	-
Human health and social work activities	Q	5 579.9	0.3
Arts, entertainment and recreation	R	8 766.7	0.5
Other services activities	S	... ¹	... ¹

1 The data is not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information

Source: Regional Statistics Department

As of December 31, 2018 in Khmelnytskyi region, the volume of FDI amounted to \$ 199.5 million (Table 1.14). Main areas of investment are processing industry (\$ 15.7 million), trade (\$21.3 million), real estate activities (\$ 10.4 million) and agriculture (\$ 8.0 million).

Table 1.14. The structure of FDI by types of economic activity in Khmelnytskyi region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		199 465.3	100.0
Agriculture, forestry and fishing	A	8 010.6	4.0
Industry	B+C+D+E	157 471.3	78.9
mining and quarrying	B	88.6	0.0
processing industry	C	157 289.8	78.8
electricity, gas, steam and air conditioning supply	D	92.9	0.0
water supply; sewerage; waste management and remediation activities	E	-	-
Construction	F	327.1	0.2
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	21 285.8	10.7
Transporting and storage	H	1 594.9	0.8
Accommodation and food service activities	I	... ¹	... ¹
Information and communication	J	46.0	0.0
Financial and insurance activities	K	-	-
Real estate activities	L	10 411.4	5.2
Administrative and support service activities	N	229.7	0.1
Education	P	... ¹	... ¹
Human health and social work activities	Q	-	-
Arts, entertainment and recreation	R	... ¹	... ¹
Other services activities	S	-	-

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Source: Regional Statistics Department

As of December 31, 2018 in Cherkasy region, the volume of FDI amounted to \$ 334.3 million (Table 1.15). Main areas of investment are processing industry (\$ 270.6 million), agriculture (\$ 19.6 million) and real estate activities (\$ 28.4 million).

Table 1.15. The structure of FDI by types of economic activity in Cherkasy region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		334 300.0	100.0
Agriculture, forestry and fishing	A	19 671.1	5.9
Industry	B+C+D+E	272 474.9	81.5
mining and quarrying	B	... ¹	... ¹
processing industry	C	270 658.5	71.0
electricity, gas, steam and air conditioning supply,	D	1 164.3	0.3
water supply; sewerage; waste management and remediation activities	E	... ¹	... ¹
Construction	F	1.7	0.0
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	7 731.6	2.3
Transporting and storage	H	489.5	0.1
Real estate activities	L	28 350.2	8.5
Professional, scientific and technical activities	M	3 480.4	1.0
Administrative and support service activities	N	1 620.3	0.5
Other services activities	S	-	-

¹ The data are not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information

Source: Regional Statistics Department

As of December 31, 2018 in Chernihiv region, the volume of FDI amounted to \$433.7 million (Table 1.16). Main areas of investment are the processing industry (\$397 million) and agriculture (\$16.1 million).

Table 1.16. The structure of FDI by types of economic activity in Chernihiv region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		433 748.4	100.0
Agriculture, forestry and fishing	A	16 118.7	3.7
Industry	B+C+D+E	399 207.6	92
mining and quarrying	B	... ¹	... ¹
processing industry	C	397 013.6	91.5
electricity, gas, steam and air conditioning supply,	D	... ¹	... ¹
water supply; sewerage; waste management and remediation activities	E	... ¹	... ¹
Construction	F	... ¹	... ¹
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	1 434.0	0.3
Transporting and storage	H	489.4	0.1
Real estate activities	L	2 899.7	0.7
Professional, scientific and technical activities	M	84.5	0.01
Administrative and support service activities	N	7 289.5	1.7
Other services activities	S	... ¹	... ¹

¹ The data are not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information

Source: Regional Statistics Department

As of December 31, 2018 in Zhytomyr region, the volume of FDI amounted to \$237.4 million (Table 1.17). Main areas of investment are processing industry (\$183.9 million) and agriculture (\$21.2 million).

Table 1.17. The structure of FDI by types of economic activity in Zhytomyr region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		237 435.5	100.0
Agriculture, forestry and fishing	A	21 237.1	8.9
Industry	B+C+D+E	191 939.2	80.8
mining and quarrying	B	7 189.4	3
processing industry	C	183 884.7	77.4
electricity, gas, steam and air conditioning supply,	D	... ¹	... ¹
water supply; sewerage; waste management and remediation activities	E	... ¹	... ¹
Construction	F	5 319.8	2.2
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	5 191.0	2.2
Transporting and storage	H	1 280.3	0.5
Real estate activities	L	10 392.9	4.4
Professional, scientific and technical activities	M	125.7	0.05
Administrative and support service activities	N	1 852.1	0.8
Other services activities	S	... ¹	... ¹

¹ The data are not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information.

Source: Regional Statistics Department

As of December 31, 2018 in Kirovohrad region, the volume of FDI amounted to \$ 69.3 million (Table 1.18). Main areas of investment are construction (\$24.5 million) and processing industry (\$20.8 million).

Table 1.18. The structure of FDI by types of economic activity in Kirovohrad region as of December 31, 2018

Type of economic activity	Economic activity code-2010	FDI volume, thousand US\$	%
Total		69 298.4	100.0
Agriculture, forestry and fishing	A	1 921.7	2.8
Industry	B+C+D+E	22 658.3	32.7
mining and quarrying	B	... ¹	... ¹
processing industry	C	20 830.5	30.0
electricity, gas, steam and air conditioning supply	D	... ¹	... ¹
water supply; sewerage; waste management and remediation activities	E	-	-
Construction	F	24 496.5	35.3
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	6 271.8	9.0
Transporting and storage	H	3 086.2	4.5
Real estate activities	L	3 032.4	4.4
Professional, scientific and technical activities	M	-	-
Administrative and support service activities	N	4 229.4	6.1
Other services activities	S	3 602.1	5.2

¹ The data are not disclosed in order to ensure compliance with the requirements of the Law of Ukraine "On State Statistics" regarding the confidentiality of statistical information.

Source: Regional Statistics Department

International grants and participants of donor programs

The information about international grants and participants of donor programs was taken from the official portal of coordination of international assistance in Ukraine of Ministry of Economic Development, Trade and Agriculture of Ukraine:

- <http://proaid.gov.ua/uk/donors>;
- <https://www.me.gov.ua/Documents/List?lang=uk-UA&id=500f9d86-3436-4e32-92f5-bfbe2aeaf30f&tag=PerelikiZarestrovanikhProektivZPlanamiZakupivel>.

The number of organizations with grants and of participants of donor programs according to researched sectors in the regions under consideration:

- Khmelnytskyi – 4;
- Cherkasy – 2;
- Kyiv region – 7;
- Zhytomyr – 6;
- Vinnytsia – 4;
- Chernihiv – 2;
- Kyrovograd – 1.

Programs implemented throughout Ukraine – 31.

More detailed information about grants and donor programs you can see in the tables below.

Table 1.19. List of organizations – participants of donor programs in Khmelnytskyi region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	NGO "Public Movement" New Economic Policy ""	ГО "Громадський рух "Нова економічна політика""	Grant	"EU4BUSINESS: Network of business support centres in Ukraine"	European Bank for Reconstruction and Development (EBRD)	15.06.2019	20.08.2020
2	State Educational Institution "Podilsky Center for Vocational Education"	Державний навчальний заклад "Подільський центр професійно-технічної освіти"	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022
3	Separated subdivision "Khmelnytsky NPP"	Відокремлений підрозділ «Хмельницька АЕС» (ВП «ХАЕС»)	Grant	Програмне забезпечення RiskSpectrum, RiskWatcher для АЕС «ДП «НАЕК Енергоатом»/ RiskSpectrum, RiskWatcher software for NPP "NAEK Energoatom"	The Government of the Kingdom of Sweden	12.04.2018	12.04.2021
4	Khmelnytskyi Regional NoKhmelnytsky NPPn-Governmental Organization «Podilsky Center» Gender Council»	Хмельницька обласна громадська організація «Подільський центр «Гендерна рада»	Grant	Просування політичної участі жінок в Україні/Promoting women's political participation in Ukraine	The United Kingdom of Great Britain	01.03.2017	31.10.2020

Table 1.20. List of organizations - participants of donor programs in Cherkasy region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	Cherkasy higher vocational school of construction technologies	Черкаське вище професійне училище будівельних технологій	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to	Government of the Swiss Confederation	01.11.2018	31.10.2022

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
				improve plumbing education in Ukraine			
2	Department of Culture of Uman City Council; NGO "City Space Laboratory"	Відділ культури Уманської міської ради; ГО "Лабораторія міського простору"	Grant	ReHERIT: Спільна відповідальність за спільну спадщину/ ReHERIT: Sharing responsibility for a shared heritage	European Union	20.07.2018	19.07.2020

Table 1.21. List of organizations - participants of donor programs in Kyiv region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	City Council of Slavutych City NGO "Small Business Laboratory"	Виконавчий комітет Славутицької міської ради; Міська громадська організація "Лабораторія малого бізнесу"	Grant	План місцевого економічного розвитку: Славутич – драйвер росту відкритої та вільної економіки регіону / Local Economic Development Plan: Slavutych is a driver of growth for the region's open and free economy	European Union	20.12.2017	20.04.2020
2	Kyiv Chamber of Commerce and Industry	Київська торгово-промислова палата	Grant	"EU4BUSINESS: Network of business support centres in Ukraine"	European Bank for Reconstruction and Development (EBRD)	15.06.2019	20.08.2020
3	State Enterprise "Kyiv State Interregional Special Combine"	ДСП "Київський державний міжобласний спеціальний комбінат"	Grant	Покращення збереженості відпрацьованих джерел іонізуючого випромінювання в Україні / Improvement of the safety of spent sources of ionizing radiation in Ukraine	U.S. Government	01.11.2005	31.08.2020
4	Bila Tserkva National Agrarian University	Білоцерківський національний аграрний університет	Grant	Поліпшення навичок з лабораторної практики у	European Union	15.10.2017	14.10.2020

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
				фахівців агропродовольчого сектору Східної Європи / Improving laboratory practice skills in the agri-food sector of Eastern Europe			
5	Taras Shevchenko National University of Kyiv	Київський національний університет імені Тараса Шевченка	Grant	Переосмислення регіональних досліджень: Балто-Чорноморський зв'язок / Rethinking regional studies: the Baltic-Black Sea link	European Union	15.10.2017	14.10.2020
6	Dolishniy Institute of Regional Research	Інститут регіональних досліджень імені М. І. Долішнього	Grant	Стимулювання місцевого економічного зростання в прикордонних регіонах у процесі інтеграції до ЄС: кращі практики країн Східного партнерства / Encouraging local economic growth in border regions in the EU integration process: best practices of the Eastern Partnership countries	European Union	01.09.2018	31.08.2021
7	“Brovarsky Professional Lyceum” Kyiv Regional Higher Professional School of Civil Engineering	ДПТНЗ «Броварський професійний ліцей» ДНЗ «Київське регіональне вище професійне училище будівництва»	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022

Table 1.22. List of organizations - participants of donor programs in Zhytomyr region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	City Council of Baranivka	Баранівська міська рада	Grant	Молодіжний кластер органічного бізнесу Баранівської міської об'єднаної територіальної громади	European Union	01.02.2018	01.02.2021
2	Center for Vocational Education in Zhytomyr	Центр професійно-технічної освіти м. Житомира	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022
3	City Council of Ovruch	Овруцька міська рада	Grant	Реконструкція вуличного освітлення в м.Овруч/Reconstruction of street lighting in Ovruch	European Bank for Reconstruction and Development (EBRD)	01.01.2019	31.12.2020
4	Zhytomyr Medical Institute	Комунальний вищий навчальний заклад «Житомирський медичний інститут» Житомирської обласної ради	Grant	Проект розвитку медичної освіти в Україні / "Medical Education Development in Ukraine" Project	Government of the Swiss Confederation	06.12.2018	30.11.2022
5	City Council of Zhytomyr Zhitomirteplocomunenergo	Житомирська міська рада; Житомиртеплокомуненерго	Grant	Проект централізованого теплопостачання у місті Житомирі/ District Heating Project in Zhytomyr	European Bank for Reconstruction and Development (EBRD)	23.02.2012	31.05.2020
6	NGO "Institute for Creative Innovation"	ГО «Інститут креативних інновацій»	Grant	Просування політичної участі жінок в Україні/Promoting women's political participation in Ukraine	The United Kingdom of Great Britain	01.03.2017	31.10.2020

Table 1.23. List of organizations - participants of donor programs in Vinnytsia region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	City Council of Severynivka City Council of Bar NGO "Podil Regional Development Agency"	Виконавчий комітет Северинівської міської ради; Виконавчий комітет Барської міської ради; Громадська організація "Подільська агенція регіонального розвитку"	Grant	Кластер "Яблуневий шлях"/ Cluster "Apple Road"	European Union	01.03.2018	31.05.2020
2	Higher Art Professional School № 5 of Vinnitsa	Вище художнє професійно- технічне училище № 5 м. Вінниця	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public- private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022
3	City Council of Hnivan NGO "Euroregion" Dnister"	Гніванська міська рада; Громадська організація «Єврорегіон «Дністер»	Grant	Енергоефективний Гнівань – енергетична політика для сталого розвитку міста Гнівань/ Energy efficient Hnivan is an energy policy for the sustainable development of Hnivan	European Union	29.12.2017	28.12.2020
4	Vinnitsa National Technical University	Вінницький національний технічний університет	Grant	Інноваційна мультидисциплінарна навчальна програма для підготовки бакалаврів та магістрів зі штучних імплантів для біоінженерії/ Innovative Multidisciplinary Curriculum for Bachelor's and Master's Degree in Implants for Bioengineering	European Union	15.11.2017	14.11.2020

Table 1.24. List of organizations - participants of donor programs in Chernihiv region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	Chernihiv Chamber of Commerce and Industry	Чернігівська регіональна торгово-промислова палата	Grant	"EU4BUSINESS: Network of business support centres in Ukraine"	European Bank for Reconstruction and Development (EBRD)	15.06.2019	20.08.2020
2	Pryluky Professional Lyceum of Chernihiv region Chernihiv Professional Railway Lyceum	Прилуцький професійний ліцей Чернігівської області Чернігівський професійний ліцей залізничного транспорту	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022

Table 1.25. List of organizations - participants of donor programs in Kyrovograd region

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	Kyrovograd Chamber of Commerce and Industry	Кіровоградська регіональна торгово-промислова палата	Grant	Публічно-приватне партнерство для поліпшення сантехнічної освіти в Україні / Public-private partnership to improve plumbing education in Ukraine	Government of the Swiss Confederation	01.11.2018	31.10.2022

Table 1.26. List of donor programs implemented in Ukraine

№	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	Antimonopoly Committee of Ukraine	Антимонопольний комітет України	Grant	Програма технічної допомоги з розвитку інституційного потенціалу України у застосуванні законодавства та здійснення політики у сфері конкуренції / Technical Assistance Program for the Development of the Institutional Capacity of Ukraine in Law Enforcement and Competition Policy	U.S. Government	30.03.2016	30.03.2020
2	Non-governmental union "Foundation for support of reforms in Ukraine"	Громадська спілка "Фонд підтримки реформ в Україні"	Grant	Консолідація експортного потенціалу та сприяння доступу на зовнішній ринок малого та середнього бізнесу України / Consolidation of export potential and promotion of access to the foreign market of small and medium business in Ukraine	European Bank for Reconstruction and Development (EBRD)	15.01.2018	31.05.2020
3	State Agency on Energy Efficiency and Energy Saving of Ukraine	Державне агентство з енергоефективності та енергозбереження України	Grant	Зміцнення потенціалу Державного агентства з енергоефективності та енергозбереження України задля розвитку виробництва енергії з відновлюваних джерел, виробництва та використання альтернативних видів палива / Strengthening the potential of the State	European Union	01.03.2019	31.05.2020

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				Agency for Energy Efficiency and Energy Saving of Ukraine for the development of renewable energy production, production and use of alternative fuels			
3	Ministry for Communities and Territories Development of Ukraine	Мінрегіонбуд	Grant	Підтримка децентралізації в Україні / Support for decentralization in Ukraine	Government of the Swiss Confederation	01.12.2006	30.06.2020
4	Ministry for Communities and Territories Development of Ukraine	Мінрегіонбуд	Grant	Підтримка реформи децентралізації в Україні/U-LEAD з Європою: Програма для України з розширення прав і можливостей на місцевому рівні, підзвітності та розвитку – Компонент I / Supporting the Decentralization Reform in Ukraine / U-LEAD with Europe: A Program for Ukraine on Local Empowerment, Accountability and Development - Component I	Government in the Federal Republic of Germany	01.10.2015	30.06.2020
5	Grin Kors Ukraine Ltd.	ТОВ “Грін Корс Україна”	Grant	Network of Business Incubators "School Garden" for the development of modern agricultural entrepreneurship, professional and social development of youth in poor and needy rural settlements	European Union	01.07.2018	30.07.2020
6	National Commission for the State Regulation of Financial Services Markets, All-Ukrainian Association of Credit Unions,	Національна комісія, що здійснює державне регулювання у сфері ринків фінансових послуг, кредитна спілка “Харківська каса	Grant	Кредитування сільськогосподарських виробників / Lending to agricultural producers	U.S. Government	25.08.2016	24.08.2020

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	National Association of Credit Unions of Ukraine	взаємодопомоги”, Всеукраїнська асоціація кредитних спілок, Національна асоціація кредитних спілок України					
7	Ministry for Communities and Territories Development of Ukraine	Міністерство регіонального розвитку, будівництва та житлово-комунального господарства України	Grant	Мери за економічне зростання / Mayor by economic growth	European Union	01.01.2017	31.12.2020
8	Government Office for the Coordination of European and Euro-Atlantic Integration, Ministry for Development of Economy and Trade of Ukraine, Ministry of Culture of Ukraine	Урядовий офіс координації європейської та євроатлантичної інтеграції Секретаріату Кабінету Міністрів України; Міністерство економічного розвитку і торгівлі України; Міністерство культури України	Grant	Консультаційний фонд підтримки асоціації України-ЄС / Consultative Fund to support Ukraine-EU Association	Government in the Federal Republic of Germany	01.01.2018	31.12.2020
9	Ministry for Development of Economy and Trade of Ukraine, Ministry for Communities and Territories Development of Ukraine	Міністерство економічного розвитку і торгівлі України; Міністерство регіонального розвитку, будівництва та житлово-комунального господарства України	Grant	Підвищення конкурентоспроможності українських регіонів та розвиток польсько-українського економічного співробітництва / Increasing the competitiveness of Ukrainian regions and developing Polish-Ukrainian economic cooperation	Government of the Republic of Poland	29.10.2018	31.12.2020
10	Confederation of Free Trade Unions of Ukraine; Federation of Trade Unions of Ukraine	Конфедерація вільних профспілок України; Федерація професійних спілок України	Grant	Глобальна трудова програма: Україна / Global Work Program: Ukraine	U.S. Government	01.02.2016	31.01.2021
11	Ministry for Development of Economy and Trade of Ukraine	Міністерство економічного розвитку і торгівлі України	Grant	Канадсько-український проект з підтримки торгівлі та інвестицій / Canadian-Ukrainian Trade and Investment Support Project (CUTIS)	Government of Canada	09.02.2016	01.02.2021
12	Ministry for Development of Economy and Trade of Ukraine; “Karameia” Ltd;	Мінекономрозвитку, ТОВ “Керамейя”; Держенергоефективності	Grant	Консультавання підприємств щодо енергоефективності /	Government in the Federal Republic of	01.03.2017	28.02.2021

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	State Agency on Energy Efficiency and Energy Saving of Ukraine			Advising businesses on energy efficiency	Germany		
13	Ministry for Development of Economy and Trade of Ukraine	Міністерство економічного розвитку і торгівлі України	Grant	Стипендіальна програма німецької економіки для України II / German Economy Scholarship Program for Ukraine II	Government in the Federal Republic of Germany	01.03.2018	31.07.2021
14	Ministry for Development of Economy and Trade of Ukraine	Міністерство економічного розвитку і торгівлі України	Grant	Підтримка участі України у програмі COSME / Supporting Ukraine's participation in the program COSME	European Union	18.12.2018	18.12.2021
15	Ministry of Infrastructure of Ukraine	Міністерство інфраструктури України	Grant	Сприяння транспортного розвитку річки Дніпро / Promoting the Dnieper River Transport Development	European Union	28.12.2018	27.12.2021
16	Ministry of Finance of Ukraine	Міністерство фінансів України	Grant	Гендерне бюджетування в Україні / Gender responsive budgeting in Ukraine	The Government of the Kingdom of Sweden	12.11.2013	31.12.2021
17	Ministry of Agrarian Policy and Food of Ukraine	Міністерство аграрної політики та продовольства України	Grant	Надання консультацій Україні з питань аграрної торгівлі – в рамках Угоди про поглиблену та всеохоплюючу зону вільної торгівлі (ПВЗВТ) між ЄС та Україною / Advising Ukraine on agricultural trade - within the framework of the EU-Ukraine Deep and Comprehensive Free Trade Area Agreement	Government in the Federal Republic of Germany	01.01.2019	31.12.2021
18	Ministry of Agrarian Policy and Food of Ukraine	Міністерство аграрної політики та продовольства України	Grant	Технічна допомога на підтримку впровадження операції "Основний кредит для аграрної галузі - Україна" / Technical	European Investment Bank	24.01.2019	23.01.2022

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				assistance to support the implementation of the operation "The main credit for the agricultural industry - Ukraine"			
19	Ukrainian Social Investment Fund (USIF)	Український фонд соціальних інвестицій (УФЦИ)	Grant	Надання соціальних послуг в громаді / Provision of social services in the community	International Bank for Reconstruction and Development (IBRD)	01.12.2018	31.10.2022
20	Ukrainian non-governmental and charitable organizations, local authorities and local self-government bodies, libraries, other interested state and municipal institutions (at the destination of volunteers)	Українські неурядові та благодійні організації, місцеві органи виконавчої влади та органи місцевого самоврядування, бібліотеки, інші зацікавлені державні та комунальні установи (за місцем призначення волонтерів)	Grant	Розвиток громад* / Community Development*	U.S. Government	01.03.2006	31.12.2022
21	State Enterprise "National Energy Company" Ukrenergo "	Державне підприємство "Національна енергетична компанія "Укренерго"	Grant	Консультаційні послуги в рамках проектів "Реконструкція підстанцій у східній частині України" та "Підвищення енергоефективності в електропередачі (реконструкція трансформаторних підстанцій) - II" / Consulting services within the framework of the projects "Reconstruction of substations in the eastern part of Ukraine" and "Improving energy efficiency in electricity transmission (reconstruction of transformer substations) - II"	Government in the Federal Republic of Germany	27.04.2018	10.02.2023
22	Ministry of Energy and Coal	Міністерство енергетики та	Grant	Проект енергетичної	U.S.	01.07.2018	30.06.2023

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	Industry of Ukraine, other state authorities, energy companies	вугільної промисловості України, інші органи державної влади, енергетичні компанії		безпеки / Energy security project	Government		
23	Lugansk Regional Military-Civil Administration; Donetsk Regional Military-Civil Administration; local communities, non-governmental organizations, local governments, private enterprises	Луганська обласна військово-цивільна адміністрація; Донецька обласна військово-цивільна адміністрація; місцеві громади, громадські організації, органи місцевого самоврядування, приватні підприємства	Grant	Економічна підтримка Східної України / Economic support of Eastern Ukraine	U.S. Government	27.08.2018	26.08.2023
24	State Regulatory Service of Ukraine, NGO "Kyiv IT Cluster"; Association "Ukrainian Furniture Association"; FOP Paruna I.V.; FOP Goncharuk V.P.; DEX Technologies LLC; NGO "Public Initiatives Development Center"; Association "Information Technologies of Ukraine"; TRIADA LTD CO LLC; TIM-METIZ LLC; PJSC "Red Wave"; GS "Food Export Council"; NGO "Ukraine Investment & Trade Facilitation Center"	Державна регуляторна служба України, ГО "Київ ІТ Кластер"; Асоціація "Українська Асоціація Меблевиків"; ФОП Паруна І.В.; ФОП Гончарук В.П.; ТОВ "ДЕКС ТЕХНОЛОДЖІС"; ГО "Український Центр Громадських Ініціатив "СВІТ"; Асоціація "Інформаційні технології України"; ТОВ "ТРИАДА ЛТД КО"; ТОВ "ТІМ-МЕТИЗ"; ПрАТ НВО "Червона Хвиля"; ГС "Рада з питань експорту продовольства"; ГО "Український центр сприяння інвестиціям та торгівлі"	Grant	Конкурентоспроможна економіка України / The competitive economy of Ukraine	U.S. Government	16.10.2018	15.10.2023
25	Ministry for Development of Economy and Trade of Ukraine; Ministry for Communities and Territories Development of Ukraine; Kerameya LLC; NGO "Youth Center for Social Transformation Problems" SOCIUM-XXI "; NGO "Ukrainian Leadership Academy"; GS Reform Support Fund in Ukraine; JSC Charitable Foundation "Kennekshons"; PJSC "Kredobank"; PJSC "State	Мінекономрозвитку, ТОВ "Керамейя"; ГО "Молодіжний центр з проблем трансформації соціальної сфери "СОЦІУМ-XXI"; ГО "Українська Академія Лідерства"; ГС "Фонд підтримки реформ в Україні"; БО "Благодійний фонд "Кенекшнс"; ПАТ "Кредобанк"; ПАТ "Державний ощадний банк України"; суб'єкти малого та середнього бізнесу, отримувачі кредитів, визначені на	Grant	Програма лідерства, сприяння експорту, залучення інвестицій та розвитку / Leadership Program, Export Promotion, Investment Attraction and Development	U.S. Government	21.09.1994	31.12.2023

	Savings Bank of Ukraine”; small and medium-sized business entities, recipients of competitively determined loans; students who have been identified as fellows in the Economic Leadership and other programs within the project; Charitable Foundation ‘BREINBASKET FOUNDATION’; NGO “Train for Ukraine”; Higher education institution “Ukrainian Catholic University”; National University of Kyiv-Mohyla Academy; NGO “Medical Reform Support Center”; Ministry of Health of Ukraine; Chernihiv Regional Chamber of Commerce and Industry; Agricultural service cooperative "Fine"	конкурсній основі; студенти, які були визначені як стипендіати програми Економічного Лідерства та інших програм, в рамках проекту; БО “Благодійний фонд “БРЕЙНБАСКЕТ ФАУНДЕЙШН”; ГО “Навчай для України”; Вищий навчальний заклад “Український католицький університет”; Національний університет “Києво-Могилянська академія”; ГО “Центр підтримки медичної реформи”; Міністерство охорони здоров’я України; Чернігівська регіональна торгово-промислова палата; Сільськогосподарський обслуговуючий кооператив «Файний»					
26	OTP Leasing, LLC	Товариство з обмеженою відповідальністю «ОТП Лізинг»	Grant	Програма ЄБРР Поглиблення та всеохоплююча зона вільної торгівлі (ПВЗВТ): кредитні лінії з інвестиційними винагородами / EBRD Deepening and Comprehensive Free Trade Area: Investment Credit lines	European Bank for Reconstruction and Development (EBRD)	17.08.2018	30.11.2028
27	Kharkiv National University of Radio Electronics; National Technical University "Kharkiv Polytechnic Institute"; Ukrainian Association of IT Professionals	Харківський національний університет радіоелектроніки; Національний технічний університет «Харківський політехнічний інститут»; Українська асоціація фахівців IT	Grant	Рамкова структура цифрових компетенцій для українських вчителів та інших громадян / Framework for digital competences for Ukrainian teachers and other citizens	European Union	15.11.2018	14.11.21
28	Ministry of Education and Science of Ukraine	Міністерство освіти і науки України	Grant	Підтримка участі України у Рамковій програмі	European Union	23.11.2017	23.05.2021

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				Європейського Союзу з досліджень та інновацій Горизонт 2020 / Support for Ukraine's participation in the European Union Framework Program for Research and Innovation Horizon 2020			
29	Ministry for Development of Economy and Trade of Ukraine; GS Reform Support Fund in Ukraine; Chamber of Commerce and Industry of Ukraine; Kyiv Regional Research and Production Center for Standardization, Metrology, Certification and Consumer Protection »	Міністерство економічного розвитку і торгівлі України; ГС «Фонд підтримки реформ в Україні»; Торгівно-промислова палата України; Київський обласний науково-виробничий центр стандартизації, метрології, сертифікації та захисту справ споживачів»	Grant	Підтримка рамкових угод для торгівлі / Support for framework agreements for trade	Федеральне міністерство економічного співробітництва та розвитку Німеччини	01.12.2016	31.05.2020
30	State Statistics Service of Ukraine	Державна служба статистики України	Grant	Поставка програмного забезпечення та комп'ютерного обладнання для розбудови Інтернет-порталу статистичних даних Державної служби статистики України / Supply of software and computer equipment for development of the Internet portal of statistics of the State Statistics Service of Ukraine	European Union	18.03.2019	12.01.2020
31	Ministry of Culture of Ukraine	Міністерство культури України	Grant	Підтримка участі України у програмі ЄС «Креативна Європа» / Support for Ukraine's participation in the EU Creative Europe program	European Union	25.07.2019	24.07.2022
32	Citizen of Ukraine	Громадянин України	Grant	Навчальні подорожі для менеджерів креативних хабів / Study Tours for Creative Hub Managers	House of Europe: British Council	2019	2022

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33	Young executives of middle and upper-level enterprises with export-import potential	Молоді керівники середньої та вищої ланки підприємств з експортно-імпортним потенціалом	Grant	Навчальні подорожі для соціальних підприємців / Study trips for social entrepreneurs	House of Europe: British Council	2019	2022
34	An individual entrepreneur who runs an activity throughout 3 years. An individual who is a registered entrepreneur own business	Фізична особа підприємець, що веде діяльність протягом 3 років. Фізична особа підприємець, що тільки зареєструвала власну справу.	Grant	Erasmus for young entrepreneurs	European Union	Постійно діюча	
35	Private small or medium-sized enterprise	Приватне мале або середнє підприємство	Grant	Досвідчені експерти з нідерландів (PUM) / Experienced Dutch experts	PUM Netherlands Senior Experts	Постійно діюча	
36	Businesses with SMEs (SMEs) preference for public and private projects	Підприємствам з наданням переваги МСП (малим та середнім підприємствам) для державних та приватних проектів	Grant	Фінсько-український трастовий фонд / Finnish-Ukrainian Trust Fund	Ministry of Foreign Affairs of Finland		До 2021
37	Business representatives, startups, research institutions	Представники бізнесу, стартапи, науково-дослідницькі установи	Grant	Проект Європейського союзу для розвитку проривних технологій та інновацій / European Union project for breakthrough technology and innovation	European Innovation Council The European Commission		Подача заявок до 13.05.2020
38	Small and large enterprises, research institutes and universities	Малі та великі підприємства, науково-дослідні інститути та університети	Grant	Міжнародна програма EUREKA / International program EUREKA	European Union	Прийом заявок відбувається протягом року з урахуванням обраного проекту	
39	Global projects with team members from the US, EU or UK	Глобальні проекти з участю членів команди з США, ЄС або великої Британії	Grant	Фонд «Посівних інвестицій» WANNABIZ / Sowing Investment Fund WANNABIZ	WannaBiz	Довготривалий	

1.5. Sectors' sales channels. Retail share in sales

According to the results of companies' survey, the highest level of sales through retail networks is observed in the segment of dairy products (about 45% of sales), fresh vegetables (40%), fresh fruits (36%) and while the smallest - in sales of processed fruit and vegetables (19%) and metalworking products (26%).

Detailed information on retail sales is provided in sectional sections.

1.6. Foreign business' feedback on local authorities' support

With the purpose to determine evaluation of the local authorities' support by the Dutch and other foreign companies, there was conducted an interview survey by making phone calls to the companies that are based in Central regions of Ukraine, in particular in Khmelnytskyi, Cherkasy, Kyiv, Zhytomyr, Vinnytsia, Chernihiv and Kirovograd Regions. The list of the interviewed companies is presented in the Annex 1.

Total phone calls: 33.

Answered phone calls: 20 (out of which 19 are Dutch companies and 1 is foreign company).

Table 1.27. Average evaluation of the local authorities' support value per region*

Region	Average evaluation value	Region	Average evaluation value	Region	Average evaluation value
Khmelnyskyi	3,2	Zhytomyr	3,0	Kyrovograd	2,29
Cherkasy	2,56	Vinnytsia	2,78	Other	-
Kyiv	3,07	Chernihiv	2,44		

*Scale from 1 to 5 (1 = Poor, 2 = Fair, 3 = Good, 4 = Very good, 5 = Excellent)

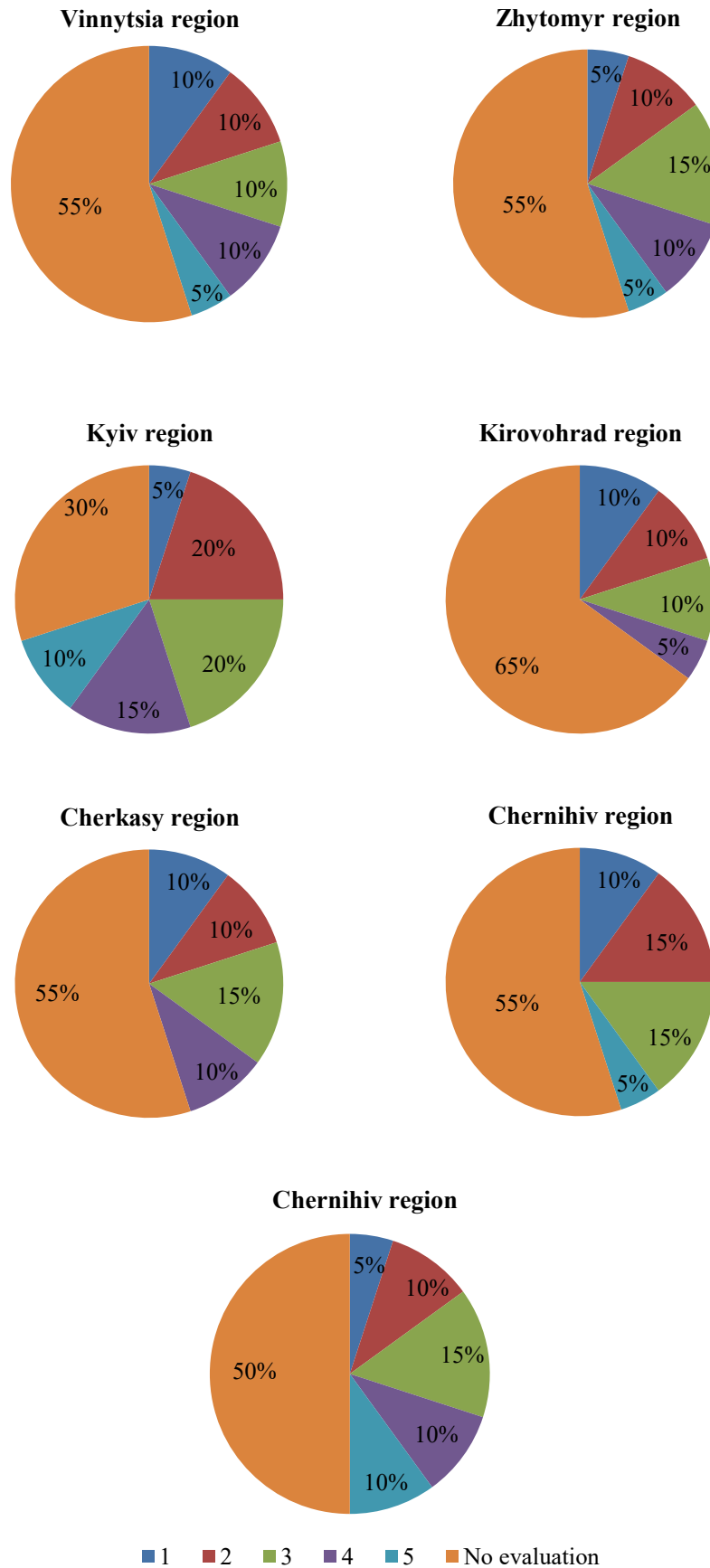


Fig. 1.12. Evaluation of support by the local government using a scale from 1 to 5
(1 = Poor, 2 = Fair, 3 = Good, 4 = Very good, 5 = Excellent, 'No evaluation' = We do not work in this area)

1.7. Availability of information for foreign businessmen or investors

Khmelnyskyi region

Information about investment opportunities in Khmelnytskyi region is available at the Khmelnytskyi Regional State Administration (RSA) website - <https://www.adm-km.gov.ua/> - in Ukrainian, <https://www.adm-km.gov.ua/?lang=en> - in English

There you can find the following information:

- Khmelnytskyi investment;
- Khmelnytskyi investment profile;
- Investment proposals of Khmelnytskyi;
- Investment proposals of cities and districts of Khmelnytsky region;
- Foreign diplomatic missions in Ukraine.

Part of the information on international programs and grants is posted in the news on the site. There is no information on SME support funds, but this information can be found in open source information.

The detailed information illustrating access to business / invest information is presented in the table below.

Table 1.28. Access of the business to business / invest information in Khmelnytskyi region

Business/invest Information	Description	Links
Investment information	Khmelnyskyi investment	ENG: https://cutt.ly/GyUWbZ6
	Khmelnyskyi investment profile	ENG: https://khm.gov.ua/sites/default/files/investment_profile_1.1_en_web.pdf
	Local Economic Development Plan of Slavuta	ENG: https://cutt.ly/mtEH56a
	Investment passport of the Dunaivtsi district	UA: https://cutt.ly/ZtEJqin
	Investment Passport of Dunaivtsi United Territorial Community In Khmelnytskyii region	UA/ENG: https://cutt.ly/StEJwrT
Investment proposals	Investment proposals of cities and districts of Khmelnytsky region	UA: https://cutt.ly/6tEJwlg
	Form of investment projects and proposals of Khmelnytskyii region	ENG: https://cutt.ly/htEJw9n
	List of land plots in the Khmelnytskyii region that may be offered to potential investors	ENG: https://cutt.ly/qtEJrrk
	Available production, office premises of the Khmelnytskyi region that can be used by investors for industrial facilities, tourist and recreational complexes, shopping and office centers	
	Biofuels – production of fuel pellets and sliver	
Land for sale	Provided information on the sale of land	UA: https://cutt.ly/MtEJuyp
Industrial parks	Industrial Park "Slavuta"	UA: https://cutt.ly/NtEXtoT
	Industrial Park "Khmelnitsky"	UA: https://cutt.ly/stEXB6v
Local producers	The list of local producers as of the 3rd quarter of 2019 by districts of Khmelnytsky region is given	UA: https://cutt.ly/3tEJsJE

Business/invest Information	Description	Links
Khmelnyskyi Chamber of Commerce and Industry	The Chamber offers a wide range of professional services, including advisory services in foreign trade and market valuation, conducts independent examination of goods, provides translation and bar coding services for goods and more. The Chamber provides business, legal information for Ukrainian and foreign entrepreneurs, organizes seminars, conferences and exhibitions in Ukraine and abroad and other events.	UA/ENG: http://tppua.org/
Regional Fund for Entrepreneurship Support in Khmelnytskyi region	Providing financial and credit support to business entities at the expense of the regional budget.	UA: https://cutt.ly/4tE8YXd
Foreign diplomatic missions in Ukraine	The list of diplomatic missions in Ukraine is presented	UA: https://cutt.ly/mtEJtXB
International events	Information about exhibitions and fairs in Ukraine in 2020	UA: https://cutt.ly/gtEJynj
Contests and grants	Communities can apply for U-LEAD Assistance with Europe to Build Modern Centers	UA: https://cutt.ly/8tEJiRN
	GoEXPORT Training: Entering New Markets	UA: https://cutt.ly/StEJoi8
	GO EU for Light Industry: Registration to the Trade Mission to Denmark 2020 is now open.	UA: https://cutt.ly/RtEJoZW
Network of SME support Centers	Khmelnitsky Youth Center	UA: https://cutt.ly/PtEJpMu
	Khmelnitsky Youth Development Club	UA: https://cutt.ly/dtEJaE0
Business magazine	The editorial offices of Khmelnytsky newspapers	UA: https://cutt.ly/WtEJdEN UA: https://cutt.ly/QtEJfGz

Cherkasy region

Business and investment information of Cherkasy region is available and sufficiently provided by the Cherkasy Regional State Administration (RSA) website - <http://ck-oda.gov.ua/> - in Ukrainian, <http://investincherkasyregion.gov.ua/en> - in English.

There you can find the following information:

- Investment projects and proposals by the region;
- Map of investment proposals of Cherkasy region;
- Export booklet;
- Investment booklet;
- Project proposals;
- Industrial park information;
- Supporting entrepreneurship.

Information on investments, exports, entrepreneurship and grants is updated monthly.

For more detailed information, see the table below.

Table 1.29. Access of the business to business / invest information in Cherkasy region

Business/invest Information	Description	Links
Investment information	Invest in Cherkasy region	UA/ENG: https://cutt.ly/itEJkcU
	Search for partners and international supplies	UA/ENG: https://cutt.ly/PtEJleR
	Market Overview	UA/ENG: https://cutt.ly/vtEJINB
	Calendar of international events	UA/ENG: https://cutt.ly/atEJzdk
	Exporter Digest	UA/ENG: https://cutt.ly/ttEJzDT
	«Buy from Cherkasy region»	UA/ENG: https://cutt.ly/RtE4QPM
Investment proposals	Map of investment opportunities	UA/ENG: https://cutt.ly/htEJvTZ
	Project offers	UA/ENG: https://cutt.ly/2tEJbTB
	Support and accompaniment for exporters	UA/ENG: https://cutt.ly/ptEJnZP
	Support and accompaniment for investors	UA/ENG: https://cutt.ly/BtEJmlf
Industrial park	Industrial park “Zolotonosha”	UA/ENG: https://cutt.ly/wtEJndP
Supporting entrepreneurship	Support for small and medium-sized enterprises at the state level Supporting SMEs internationally Digest of the entrepreneur	UA/ENG: https://cutt.ly/ltE4ZSf https://cutt.ly/YtE4XOw https://cutt.ly/utE4J2t
Contests and grants	A list of grants, internships, study opportunities with a monthly breakdown is provided.	UA: https://cutt.ly/VtE4uWs https://cutt.ly/RtEJWAO
	Competition for grants for cultural organizations	UA: https://cutt.ly/htEJEij
	Entrepreneurs of Cherkassy region are invited to educational #exportdriverchallenge	UA: https://cutt.ly/CtEJENp
Network of SME support Centers	Regional Fund of SME support of Cherkasy region	UA: https://cutt.ly/ytEJYju
	Opportunities map for SME	UA: https://cutt.ly/StEJY6x
School of entrepreneurship	Cherkasy School of Entrepreneurship SMRNK	UA: https://cutt.ly/OtEJI1o
Cherkasy Chamber of Commerce and Industry	Cherkasy Chamber of Commerce and Industry is the center of business activity in Cherkasy region. The agricultural and industrial potential of the region is well known not only in Ukraine, but also abroad. Cherkasy Chamber of Commerce and Industry has become an effective and competent partner for hundreds of industrial, commercial companies and businessmen, many of whom are united as Members of the Chamber.	UA/ENG: https://cutt.ly/ltEJO3t https://cutt.ly/4tEJPBB
Business magazine	Business Cherkasy region	UA: https://cutt.ly/BtEJAPd
	Club of professional consultations of CHPP "Kadrovichok"	UA: https://cutt.ly/utEJSkV
Business resource	Business Region portal	UA: http://dr.ck.ua/

Kyiv region

The website (<http://koda.gov.ua/> - in Ukrainian) of the Kyiv Regional State Administration contains:

- Investment passport of Kyiv region;
- Information on successful investment stories in Kyiv region;
- Information on industrial enterprises of the Kyiv region;
- Information about grants, competitions, business events that can be found in external sources;
- Investment proposals of Kyiv region.

Information on investment and business opportunities of Kyiv Regional State Administration is not relevant, the latest investment proposal is dated 12.02.2018. You can find up-to-date information on investment objects by visiting the district administration websites.

No information on international programs and grants, SME support funds. There is no information on industrial parks in the region. Information about grants, competitions, business events can be found in external sources.

For more detailed information, see the table below.

Table 1.30. Access of the business to business / invest information in Kyiv region

Business/invest Information	Description	Links
Investment proposals	Investment passport of Kyiv region. Success stories of Kyiv region. Information on industrial enterprises of the Kyiv region.	UA: https://cutt.ly/btE71zM https://cutt.ly/QtE5Tz9 https://cutt.ly/vtE5rCT
Investment proposals	Investment proposals of Kyiv region Investment proposals of districts of Kyiv region	UA: https://cutt.ly/ctE7Xo7 UA: https://cutt.ly/PtEJKXv https://cutt.ly/0tEJLA v https://cutt.ly/dtEJZ9h https://cutt.ly/etEJZ7l https://cutt.ly/JtEJXgi https://cutt.ly/8tEJCq0 https://cutt.ly/FtEJC9a https://cutt.ly/GtEJVIj https://cutt.ly/ytEJBpp https://cutt.ly/6tEJBXr https://cutt.ly/RtEJNcc https://cutt.ly/0tEJNP8 https://cutt.ly/htEJNXI https://cutt.ly/OtEJMW4
Industrial parks	Industrial park "Bila Tserkva"	UA: https://cutt.ly/ctEZYsZ
	Industrial park "Mirotiske"	UA: https://cutt.ly/9tECF3U https://cutt.ly/stECkfr
	Industrial park "Bila Tserkva 2"	UA: https://cutt.ly/stECkfr https://cutt.ly/ktECeS4 https://cutt.ly/XtEX6VE
	Industrial park "Misto Skla"	UA: https://cutt.ly/stECkfr https://cutt.ly/OtECsLU
	Industrial park "Kyivshchyna"	UA: https://cutt.ly/stECkfr

Business/invest Information	Description	Links
	Industrial park "Fastindastri"	UA: https://cutt.ly/stECkfr https://cutt.ly/ltECIb7
	"The first Ukrainian industrial park"	UA: https://cutt.ly/stECkfr
Network of SME support centers	The European Bank for Reconstruction and Development (EBRD) offers grants to SME to grow their business. The EBRD center is located in Kyiv.	UA: https://cutt.ly/JtEJ1vO
International programs, project and grants	List of international programs, funds and other useful links for attracting grants.	UA: https://cutt.ly/htEJ15x https://cutt.ly/btEJ0A3
International trade fairs	A list of International trade fairs and activities in 2019.	UA/ENG: https://cutt.ly/9tEJ2tI https://cutt.ly/utEJ2XF
Business School	Business Education Center	UA: https://cutt.ly/vtEJ9So

Zhytomyr region

Information about investment opportunities in Zhytomyr region is available on the website of Zhytomyr Regional State Administration (RSA) <http://oda.zht.gov.ua>, - in Ukrainian, on the website of the Department of Agroindustrial Development and Economic Policy of Zhytomyr Regional State Administration <http://economy-zt.gov.ua/> - in Ukrainian

There you can find the following information:

- Investment portal of Zhytomyr region;
- Support for agricultural development;
- Export support;
- International cooperation;
- Contests and grants.

The detailed information illustrating access to business / invest information is presented in the table below.

Table 1.31. Access of the business to business / invest information in Zhytomyr region

Business/invest Information	Description	Links
Investment information	Investment portal of Zhytomyr region	UA/ENG: https://cutt.ly/ptEJ8C1 http://ztinvest.gov.ua/en/
	Investment directory of Zhytomyr Invest in Zhytomyr NOW (English)	UA/ENG: https://cutt.ly/xtEJ4mk https://cutt.ly/9tEJ7St
	Investment portal of Zhytomyr	UA/ENG: https://cutt.ly/ntEJ5UU
Investment proposals	Investment projects	UA/ENG: https://cutt.ly/1tEJ62J
	Brownfield sites	UA/ENG: https://cutt.ly/ltEKqPc
	Land for "greenfield"	UA/ENG: https://cutt.ly/ltEKwoG
	Information about organizations and projects	UA/ENG:

Business/invest Information	Description	Links
	that promote business development in Ukraine	https://cutt.ly/PtEKwGI
Industrial park	Industrial park “ZHYTOMYR-EAST”	UA/ENG: https://cutt.ly/ztEJ6lh
	Industrial park "Korosten"	UA: https://cutt.ly/1tECNNH
Support for agricultural development	Support for agricultural development	UA: http://economy-zt.gov.ua/page/pidtrymka
Export support	Export support	UA: https://cutt.ly/atEKeHj
International cooperation	Euro-Atlantic integration	UA: https://cutt.ly/oyUEKkH
	Foreign trade area	https://cutt.ly/5yUEKLA
	List of enterprises that carry out FEA	https://cutt.ly/KyUELol
	European integration	https://cutt.ly/DyUELvw
	Cross-border cooperation	https://cutt.ly/yyUEZsz
Contests and grants	International technical assistance	UA: https://cutt.ly/6tEKrKf
	Ads for investors	UA: https://cutt.ly/ntEKbVS
	About competitions within the framework of the European Small and Medium Business Support Program COSME	UA: https://cutt.ly/MtEKtfl
	Actual opportunities for institutes of civil society of the region	UA: UA: https://cutt.ly/JtEKydG https://cutt.ly/JtEKxnn https://cutt.ly/qtEKx3L https://cutt.ly/ZtEKcPT https://cutt.ly/5tEKzqS
	Selection of candidates for the award has been announced Dubai International Award for Best Practices	UA: https://cutt.ly/4tEKvvc
	Registration to participate in a trade mission to Israel for light industry manufacturers	UA: https://cutt.ly/5tEKvKT
	Registration to participate in a trade mission to Sweden and Denmark has begun	UA: https://cutt.ly/NtEKvMn
	Entrepreneurs of Zhytomyr region can take part in a trade mission in Georgia	UA: https://cutt.ly/OtEKbiU
Business newspaper	Business Weekly – Newspaper MERCURY	UA: https://cutt.ly/ctEKnlG
Business Club	Business Club "Zhinochi spravy"	UA: https://cutt.ly/QtEKnN4
Business Community:	CommUnity: Networking for Business	UA: https://cutt.ly/stEKmSu
Chamber of Commerce and Industry	Zhytomyr Chamber of Commerce and Industry	UA/ENG: https://cutt.ly/xtEKQgl https://cutt.ly/5tEKExa
Centers	European Union Information Center in Zhytomyr region	https://cutt.ly/FtEKrrZ
	Export Support Center.	https://cutt.ly/TtEKWDC

Vinnytsia region

The business and investment information in Vinnytsia region is available, open and sufficient. Information about investment opportunities in Vinnytsia region is available on the Investment portal of Vinnytsia region – <http://vininvest.gov.ua/menyu/pro-oblast/> - in Ukrainian, <http://vininvest.gov.ua/en/> - in English and the website of Vinnytsia Regional State Administration (RSA) – <http://www.vin.gov.ua/> - in Ukrainian.

These 2 websites contain up-to-date information about the investment advantages of Vinnytsia region, information about important branches of the region, information about the largest enterprises and a catalog of investment offers. It also provides up-to-date information on grants, projects and programs.

The European Integration section provides links to the websites of the Ministry of Foreign Affairs of Ukraine, the Official Website of the European Union, the EU Delegation to Ukraine, the Assembly of European Regions, the Territorial Cooperation of the Eastern Partnership countries (EaPTC), the European Integration Portal.

The detailed information illustrating access to business / invest information is presented in the table below.

Table 1.32. Access of the business to business / invest information in Vinnytsia region

Business/invest Information	Description	Links
Investment information	Investment portal of Vinnytsia region	UA/ENG: http://vininvest.gov.ua/en/
	Information about the region's economy, infrastructure and natural resources is presented	UA/ENG: https://cutt.ly/wtEKTFD https://cutt.ly/ftEKT03 https://cutt.ly/PtEKYoh
	Information about all districts and cities of the region is provided	UA/ENG: https://cutt.ly/ItEKYKf
	There are 10 reasons to invest in the region	UA/ENG: https://cutt.ly/ttEKUvS
	Information about the investment industries and enterprises of these industries is provided	UA/ENG: https://cutt.ly/1tEKU5a
	The Investors section provides an overview of investor information for investors	UA: https://cutt.ly/stEKIFq
	Trade cooperation of Vinnytsia region with the countries of the European Union	UA: https://cutt.ly/ptEKOZx
Investment proposals	The catalog of offers for investments is presented	UA/ENG: https://cutt.ly/BtEKO2s
	A list of investment projects is provided	UA/ENG: https://cutt.ly/CtEKPPi
Industrial parks	Vinnytsia Industrial Park	ENG: https://cutt.ly/qtEC3wm
	Industrial Park "Vinnytsia Refrigeration Engineering Cluster"	ENG: https://cutt.ly/qtEC3wm
	Industrial Park "VINTER SPORT"	ENG: https://cutt.ly/qtEC3wm
European integration	Links to the sites of the Ministry of Foreign Affairs of Ukraine, the Official Website of the European Union, the EU Delegation to Ukraine, the Assembly of the European Regions, the Territorial Cooperation of the Eastern Partnership (EaPTC) countries, the European Integration Portal	UA: https://cutt.ly/gtEKAhb
European Integration Digest	European Integration Digest	UA: http://www.vin.gov.ua/invest/479-yevrointehratsiinyi-daidzhest
Grants, projects and programs	Provides up-to-date information on grants, projects and programs	UA: https://cutt.ly/ptEKSi5
Business magazine	Visnyk "Business connections"	UA: https://cutt.ly/jtEKfyU
Business club	Vinnytsia Business Club	UA: https://cutt.ly/ptEKF2Z
	Vinnytsia Club of Business People	UA: https://kdl.vn.ua/

Business/invest Information	Description	Links
Business portal	Business portal of Vinnytsia "Vinbazar.com"	UA: https://vinbazar.com/
Center for Technology and Innovation Support	Center for Technology and Innovation Support (TISC – Technology and Innovation Support Center).	UA: https://cutt.ly/ftEKG0s

Chernihiv region

The business and investment information in Chernihiv region is available and open. Good access to the following investment information is presented on the Chernihiv RSA's website: <http://cg.gov.ua/index.php?tp=main> - in Ukrainian.

There you can find the following information:

- General information about Chernihiv region;
- Directory of foreign economic activity entities for activities;
- Offers of Chernihiv enterprises;
- Unfinished construction objects;
- Offers of land plots of type "Greenfield" in Chernihiv region;
- Investment proposals that require financing in Chernihiv region.

Provided information on the legislation in the public-private partnership, the roadmap keeps the private-private partnership and reviews the ministries that are scheduled to use the public-private partnership.

Recommendations on standards of approval and support of investors at local and regional level are presented.

Placement of information on projects of international technical assistance and preferential lending programs open for participation in grant contests.

The detailed information illustrating access to business / invest information is presented in the table below.

Table 1.33. Access of the business to business / invest information in Chernihiv region

Business/invest Information	Description	Links
Investment information	Information about Chernihiv region is presented	UA/ENG: https://cutt.ly/xtEKHM2
	Directory of subjects of foreign economic activity by activity	UA/ENG: https://cutt.ly/StEKJL4
	Offers of Chernihiv enterprises	UA/ENG: https://cutt.ly/utEKXEP
	Updated information about investments in the region is provided	UA/ENG: https://cutt.ly/BtEK2Hz
	Information about foreign investments	https://cutt.ly/otEK9k9
Investment proposals	Interactive investment map of Chernihiv region	UA/ENG: https://cutt.ly/KtEK4LI
	Generalized information on the inclusion in the list of land plots of agricultural purpose of state property for sale of the right to them at	UA/ENG: https://cutt.ly/0tEK3Qf

Business/invest Information	Description	Links
	land auctions in accordance with orders	
	Offers to purchase premises	UA: https://cutt.ly/etEK8nu
	Unfinished construction objects	UA: https://cutt.ly/OtEK4uZ
	Offers of land plots of type "Greenfield" in the territory of Chernihiv region	UA: https://cutt.ly/StRtbTL
	Investment proposals that need financing in the Chernihiv region	UA: https://cutt.ly/StRtbTL
Regulations	Regulatory documents on investment activity are presented	UA: https://cutt.ly/5tEKBp1
Public-private partnership	Provided information on public-private partnership legislation. Roadmap for public-private partnership implementation. List of objects for which public-private partnership mechanisms are planned.	UA: https://cutt.ly/4tEKNJ4 https://cutt.ly/ntEK0dm https://cutt.ly/stEK2wX
Standards for investor involvement and support	Recommendations on standards of attraction and support of investors at local and regional level are presented	UA: https://cutt.ly/3tEK2QM
Basic taxes in Ukraine and their rates	Tax information is provided	UA: https://cutt.ly/1tEK9Xy
Industrial Parks	The Law of Ukraine on Industrial Parks	UA: https://cutt.ly/stEK40F
	Network of industrial parks in Ukraine	
Integration Portal	EU-UA.ORG European Integration Portal European Integration Digest	UA: https://cutt.ly/MtEK7zT
Exhibitions, fairs	There is up-to-date information on exhibitions and fairs around the world	UA/ENG: https://cutt.ly/7tEK7VT
Grants, competitions, projects	Information on open tenders, international technical assistance projects and preferential lending programs for international financial institutions	UA/ENG: https://cutt.ly/ctEK5xd https://cutt.ly/PtEK5Cm
Business Center	Business Information Support Center	UA/ENG: https://cutt.ly/EtEK6sL

Kyrovograd region

Information about investment opportunities in Kyrovograd region is available at the Kyrovograd Regional State Administration (RSA) website - <http://www.kr-admin.gov.ua/start.php> in Ukrainian. There you can find the following information:

- Investment passport Kyrovograd region;
- Investment potential Kyrovograd region;
- Investment proposals Kyrovograd region;
- Standards of attraction and support of investors;
- Information on interregional cooperation.

The website provides information on international technical assistance that is up-to-date.

The detailed information illustrating access to business / invest information is presented in the table below.

Table 1.34. Access of the business to business / invest information in Kyrovograd region

Business/invest Information	Description	Links
Investment information	Passport Kyrovograd region	UA: https://cutt.ly/DtRyeC9
	Investment passport Kyrovograd region	UA/ENG: https://cutt.ly/2tRyRdy
	Investment potential Kyrovograd region	ENG: https://cutt.ly/ytRyLXw
	Interactive map of implemented projects	UA/ENG: https://cutt.ly/RtRuspa
Investment proposals	Investment proposals Kyrovograd region	UA/ENG: https://cutt.ly/EtRyUGh
Standards of attraction and support of investors	Information on sectors (sectors) of economy of Kyrovograd region that have the best investment potential Investment proposal Questionnaire for land proposed for implementation of the investment project Questionnaire for industrial real estate property property	UA: https://cutt.ly/ntRyJF8
Industrial Park	Industrial Parks "Oleksandriya"	ENG: https://cutt.ly/QtEVha0 https://cutt.ly/rtEVjUF https://cutt.ly/lteVkcZ
Information on cooperation with the EU	About the EU	UA: https://cutt.ly/KtRuHlh
	Information on the application of autonomous trade preferences by the European Union to Ukraine	ENG: https://cutt.ly/stRuIQE
	Delegation of the European Union to Ukraine	ENG: https://cutt.ly/dtRuOmD
	Information materials on the institution building tool TAIEX	UA: https://cutt.ly/UtRuDoz
Interregional cooperation	Information on interregional cooperation	UA: https://cutt.ly/ltrundz
International technical assistance	Collaboration with international organizations in the field of entrepreneurship development and support and the opportunities it provides	UA: https://cutt.ly/5tRyBsy
	Digest of current grant programs	UA: https://cutt.ly/ytRyMo3
	Grant Program "EXPO LIVE"	ENG: https://cutt.ly/OtRy1Bs
	Grantmakers database	UA: https://cutt.ly/wtRy8sh
	Grant programs for small and medium businesses	UA: https://cutt.ly/BtRy59l
Information to FEA subjects	To subjects of foreign economic activity	UA: https://cutt.ly/KtRulky
Electronic business platforms	PRO effective regulation platform	UA: https://regulation.gov.ua/business/index
	Kirovohrad business	UA: http://pidpriem-gue.kr.ua/
	Portal for coordination of international assistance to Ukraine	UA/ENG: https://cutt.ly/OtRuNDU
Magazine	Magazine "Zovnishservis"	UA: https://cutt.ly/ytRiXCZ

1.8. Sector associations, cooperatives, business support organizations

Cooperatives

As of January 1, 2020, there were 671 agricultural cooperatives in 7 Central Ukrainian regions under investigation, whose activities are related to the investigated agricultural production sectors (vegetable growing, horticulture, milk production and processing) (Table 1.). The founders and members of cooperatives are usually small and medium-sized local farmers.

In all regions, the bulk of cooperatives provide a wide range of important technological services in crop production (auxiliary activities in crop production) and livestock farming (auxiliary activities in livestock farming), and include other spheres of agricultural production, in addition to the studied ones. In particular, in crop production it is a soil tillage service for all crops, spraying crops and gardens by plant protection products, etc. In animal husbandry it is a livestock breeding (artificial insemination of cattle, pigs, goats, sheep), disinfection of livestock facilities, etc.

With a powerful high-performance equipment, cooperatives perform certain technology processes fast and at a high-quality level. The benefit to the agricultural producer is that he does not need to buy and maintain machinery that will work for his needs only a few days a year.

Some cooperatives specialize exclusively on the investigated segments of agricultural production (horticulture, dairy cattle breeding, milk processing).

Table 1.35. Registered agricultural cooperatives in 7 Central Ukrainian regions under investigation as of 31.12.2019

Region	The main activity	Number
Cherkasy	01.11 Growing of cereals, leguminous crops and oil seeds	18
	01.12.0 Vegetables, ornamental gardening and nursery production	2
	01.13 Growing of vegetables and melons, roots and tubers	1
	01.24 Growing of pome fruits and stone fruits	6
	01.25 Growing of other tree and bush fruits and nuts	3
	01.29 Growing of other perennial crops	1
	01.41 Raising of dairy cattle	7
	01.45 Raising of sheep and goats	1
	01.46 Raising of swine/pigs	1
	01.49 Raising of other animals	38
	01.50 Mixed farming	3
	01.61 Support activities for crop production	23
	01.62 Support activities for animal production	6
	01.63 Post-harvest crop activities	2
	10.39 Other processing and preserving of fruit and vegetables	4
	10.51 Operation of dairies and cheese making	4
	Total	120
Chernihiv	01.11 Growing of cereals, leguminous crops and oil seeds	26
	01.12.0 Vegetables, ornamental gardening and nursery production	1
	01.13 Growing of vegetables and melons, roots and tubers	1

Region	The main activity	Number
	01.16 Growing of fibre crops	1
	01.19 Growing of other non-perennial crops	1
	01.25 Growing of other tree and bush fruits and nuts	3
	01.28 Growing of spices, aromatic, drug and pharmaceutical crops	1
	01.29 Growing of other perennial crops	1
	01.30 Plant propagation	1
	01.41 Raising of dairy cattle	9
	01.49 Raising of other animals	1
	01.50 Mixed farming	3
	01.61 Support activities for crop production	9
	01.62 Support activities for animal production	6
	10.51 Operation of dairies and cheese making	1
	Total	65
Khmelnyskiy	01.11 Growing of cereals, leguminous crops and oil seeds	35
	01.12.0 Vegetables, ornamental gardening and nursery production	3
	01.13 Growing of vegetables and melons, roots and tubers	3
	01.14 Growing of sugar cane	1
	01.19 Growing of other non-perennial crops	1
	01.24 Growing of pome fruits and stone fruits	2
	01.25 Growing of other tree and bush fruits and nuts	2
	01.41 Raising of dairy cattle	5
	01.47 Raising of poultry	1
	01.49 Raising of other animals	2
	01.50 Mixed farming	14
	01.61 Support activities for crop production	11
	01.62 Support activities for animal production	1
	10.51 Operation of dairies and cheese making	3
	Total	84
Kirovohrad	01 Crop and animal production, hunting and related service activities	1
	01.11 Growing of cereals, leguminous crops and oil seeds	21
	01.12.0 Vegetables, ornamental gardening and nursery production	5
	01.13 Growing of vegetables and melons, roots and tubers	4
	01.41 Raising of dairy cattle	3
	01.46 Raising of swine/pigs	1
	01.49 Raising of other animals	2
	01.50 Mixed farming	3
	01.61 Support activities for crop production	8
	01.62 Support activities for animal production	5
	01.63 Post-harvest crop activities	1
	10.51 Operation of dairies and cheese making	3
	Total	57
Kyiv	01 Crop and animal production, hunting and related service activities	1
	01.11 Growing of cereals, leguminous crops and oil seeds	56
	01.12 Growing of rice	1
	01.12.0 Vegetables, ornamental gardening and nursery production	23

Region	The main activity	Number
	01.13 Growing of vegetables and melons, roots and tubers	13
	01.13.0 Growing of fruits, berries, nuts and aromatic crops	6
	01.19 Growing of other non-perennial crops	1
	01.24 Growing of pome fruits and stone fruits	2
	01.25 Growing of other tree and bush fruits and nuts	5
	01.29 Growing of other perennial crops	2
	01.30 Plant propagation	1
	01.41 Raising of dairy cattle	5
	01.47 Raising of poultry	1
	01.49 Raising of other animals	2
	01.50 Mixed farming	31
	01.61 Support activities for crop production	24
	01.62 Support activities for animal production	1
	01.70 Hunting, trapping and related service activities	2
	10.51 Operation of dairies and cheese making	1
	Total	178
Vinnytsia	01.1 Crop production	1
	01.11 Growing of cereals, leguminous crops and oil seeds	51
	01.12.0 Vegetables, ornamental gardening and nursery production	2
	01.13.0 Growing of fruits, berries, nuts and aromatic crops	2
	01.21.0 Raising of cattle	1
	01.24 Growing of pome fruits and stone fruits	1
	01.25 Growing of other tree and bush fruits and nuts	1
	01.28 Growing of spices, aromatic, drug and pharmaceutical crops	1
	01.41 Raising of dairy cattle	1
	01.47 Raising of poultry	1
	01.49 Raising of other animals	2
	01.50 Mixed farming	8
	01.61 Support activities for crop production	14
	01.62 Support activities for animal production	15
	10.39 Other processing and preserving of fruit and vegetables	1
	10.51 Operation of dairies and cheese making	2
	Total	104
Zhytomyr	01 Crop and animal production, hunting and related service activities	2
	01.11 Growing of cereals, leguminous crops and oil seeds	16
	01.13 Growing of vegetables and melons, roots and tubers	3
	01.29 Growing of other perennial crops	1
	01.41 Raising of dairy cattle	5
	01.47 Raising of poultry	1
	01.50 Mixed farming	2
	01.61 Support activities for crop production	15
	01.62 Support activities for animal production	15
	10.51 Operation of dairies and cheese making	3
	Total	63

A list of cooperatives with addresses and the name of the head is given in the Annex 2.

1.9. Overview of sector events in the regions 2019

Khmelnyskyi region

With regard to sectoral measures, the Khmelnytskyi region is quite active.

The highlights of 2019:

- [III International Economic Forum “Khmelnyskyi Investment Opportunities”](#) 03/2019, organized by RSA, Regional council and CCI. The purpose of the forum is to create favorable conditions for attracting investments in the economy of the region, to present the experience of innovations implementation and to tell about the potential and benefits of the area to potential investors, to develop existing ones and to start new business relationships;
- [XXII Regional Agro-Industrial Exhibition “Agro-Podillya - 2019”](#) 09/2019, organized by Khmelnytskyi Regional State Administration. More than 350 participants from all regions of Ukraine and abroad joined the exhibition. The best products and products of local businesses were presented;
- [International Conference “Lessons learned from the experience of EU countries for Ukraine: economic development, anti-corruption reform and trust in the courts”](#) 24/10/2019. The event was part of the project "Building Bridges in Public Policy: Ukraine", funded by the Open Society Institute in cooperation with OSIFE at the Open Society Foundation. The conference featured international research. The effectiveness of the fight against corruption in Romania was discussed, how the use of Dutch experience will help to overcome the bailiffs and protectionism in the Ukrainian justice system, as well as how to turn small and medium-sized businesses in Ukraine into global champions based on the Mittelstand experience in Germany;
- [“Second Ukrainian Industrial Week”](#) 14/11/2019, organized by Khmelnytskyi CCI. The main goal of the event was to stimulate the use of modern approaches to increase the competitiveness of domestic industrial enterprises. The event was in the form of consideration of thematic panels, during which three priority directions of industrial transformation were discussed, namely: stimulation of export; smart specializations, clustering and industrial parks, as well as best practices of domestic producers' participation in international value chains.
- [“International Forum “Sewing Industry: Reload”](#) 25/04/2019, organized by the Business Information Support Center in Khmelnytskyi with the support of the European Bank for Reconstruction and Development within the framework of the European Union initiative #EU4Business. Representatives of local light industry, regional and city authorities, as well as well-known businessmen in Ukraine and abroad, participated in the forum to discuss the development of this important industry, share experience, and forge new connections;

More information on the above-mentioned and other events is in the table below.

Table 1.36. Overview of sector events in Khmelnytskiy region

Date	Event	Description	Links
03/2019	III International Economic Forum "Khmelnyskiy Investment Opportunities"	The purpose of the forum is to create favorable conditions for attracting investments into the economy of the region, to present the experience of innovations implementation and to tell about the potential and benefits of the area to potential investors, to develop existing ones and to start new business relations.	UA: https://www.adm-km.gov.ua/?page_id=52004 UA: https://cutt.ly/QtW7hp7 UA: https://cutt.ly/LtW7jVI
25/04/2019	International Forum "Sewing Industry: Reload"	Representatives of local light industry, regional and city authorities, as well as well-known businessmen in Ukraine and abroad, participated in the forum to discuss the development of this important industry, share experience, and forge new connections.	UA: https://cutt.ly/ytW7k04
10/10/2019	Seminar "Participation in European Trade Forums and Exhibitions"	Main topics of the seminar: – Organizing business missions and collaborations to enter the EU markets. – Promotion of goods and services in the Enterprise Europe Network. – EEN calendar as an effective method for finding specialized business events and contacts with potential buyers, partners and investors. – Services of the Ukrainian Export Promotion Office for Ukrainian entrepreneurs. – Practical tips for participating in trade shows. – Advantages and difficulties of cluster participation in exhibition events.	UA: https://cutt.ly/ftW7zzC
11-12/2019	III school of young businessman	The six-day educational intensive included three modules: System Marketing Digital Communications Promotion of business in social networks.	UA: https://cutt.ly/VtW7xzt
16/11/2019	Consulting Forum: Regional Specificity and Global Trends	The purpose of the forum is to promote the development of a regional consulting services market.	UA: https://cutt.ly/MtW7chW
09/2019	XXII Regional Agro-Industrial Exhibition "Agro-Podillya - 2019"	More than 350 participants from all regions of Ukraine and abroad joined the exhibition. The best products and products of local businesses were presented.	UA: https://cutt.ly/0tW7vj4 UA: https://cutt.ly/ttW7bRX
09/04/2019	Seminar "All about individual entrepreneurs"	Private entrepreneur: from opening to liquidation. Pros and cons of each tax system. Optimal construction of the business model "enterprise - private entrepreneur": assess the benefits and risks.	UA: https://cutt.ly/ytW7nOX
20/02/2019	Conference "Problems and Perspectives of Sustainable Innovative Development of Industry in the Conditions of the World of Globalization"	Industrial parks as instruments of investment attraction and stimulus for innovative industrial development; Strengthening cooperation among business, science and government to address the challenges of modern innovative industrial development: robotics, artificial intelligence, Internet of Things, economy digitalization as a whole; Participation of enterprises from Ukraine in European value chains; Human Resources issues, new competencies development	UA: https://cutt.ly/OyUcesA ENG: https://cutt.ly/ltW7mJc
17/05/2019	Workshop "International Arbitration as a Tool for Protecting Business Interests: The Practice"	Main topics of the workshop: – modern standards of preparation of foreign trade contracts; – TOP 5 risks for a lawyer (accountant, FEA manager) when drafting and executing contract	UA: https://cutt.ly/xtW7QLb

Date	Event	Description	Links
	of Preparing and Concluding Foreign Trade Contracts and Dispute Resolution”	agreements; – “connectedness” of individuals and their impact on FEA transactions and “tax purity” of the company; – effective dispute resolution techniques for foreign trade contracts; – the legal position of the Supreme Court on the support of arbitration and the prospects for its implementation; – case law of general and commercial courts on arbitration support and control of arbitral awards; – the procedure for filing a claim with the ICAC at the CCI of Ukraine, payment of the arbitration fee, specifics of preparation of the claim materials.	
30/05/2019	Round table “Modern Approaches in Establishing an Effective Risk Prevention and Management System for Small and Medium-Sized Enterprises”	Role and opportunities of business associations, chambers of commerce and industry in establishing an effective risk prevention and management system for small and medium-sized enterprises.	https://cutt.ly/UtW7Wmo
24/10/2019	International Conference “Lessons learned from EU countries' experience for Ukraine: economic development, anti-corruption reform and trust in the courts”	The conference featured international research. The effectiveness of the fight against corruption in Romania was discussed, how the use of Dutch experience will help to overcome the bailiffs and protectionism in the Ukrainian justice system, as well as how to turn small and medium-sized businesses in Ukraine into global champions based on the Mittelstand experience in Germany.	ENG: https://cutt.ly/PyUoP54
27/09/2019	Seminar “International Trade and Trade Defense Instruments for Small and Medium-Sized Entrepreneurship (SMEs) and Business Support Organizations”	Purpose: To familiarize committee members, business association leaders, entrepreneurs and employers with trade defense tools for SMEs and business support organizations.	UA: https://cutt.ly/4tW7RsF
26/10/2019	Expert Day Forum	The main purpose of the forum is to provide clear and detailed expert advice to the business environment in various fields. To familiarize regional business with development opportunities in European Union countries, in particular in Belgium.	UA: https://cutt.ly/7tW7Tef
11/11/2019	Seminar “Business Integrity or How to Become a Part of Modern European Business”	The event is part of a series of seminars on Compliance in Employment: Practical Tools for Corruption Risk Elimination.	UA: https://cutt.ly/stW7T26
28/01/2020	Training-intensive “Image of a successful company”	The purpose of the training is to teach how to create a sustainable positive image of the company. Developing a company communication strategy. The most effective communication tools are for SMEs. The right strategy in a crisis.	UA: https://cutt.ly/VtW7Y1D
11/08/2019	Round table “Promoting snail farming in Khmelnytskyi Oblast and in Ukraine as a whole”	The purpose of the event is to develop areas of self-employment for the rural population, namely the creation of family-owned snail farming.	UA: https://cutt.ly/RtW7UAJ
29-29/08/2019	Khmelnytskyi 2019 Ukrainian Youth	The Forum should become a platform for communication and networking between Diaspora	UA: https://cutt.ly/utW7IGS UA: https://cutt.ly/4tW7OaX

Date	Event	Description	Links
	Diaspora Forum	youth and the youth of Ukraine.	
12/12/2019	Sustainable Agricultural Production Forum	The purpose of the forum is to demonstrate the effectiveness of sustainable agricultural production in overcoming the problems of the agricultural sector.	UA: https://cutt.ly/MtW7PEH
13/09/2019	Scientific and practical conference on sowing winter crops for 2020	The peculiarities of sowing and the main measures of winter grain growing technology in Khmelnytsky region are discussed.	UA: https://cutt.ly/ftW7A9f
13/11/2019	Extended meeting of the two most powerful associations of the region - the board of the Union of Industrialists and Entrepreneurs and the Association of Employers' Organizations of Khmelnytsky region	The purpose of the meeting was to create conditions for increasing the competitiveness of domestic industrial enterprises and the problems of uncontrolled labor migration and the "starvation" of skilled workers.	UA: https://cutt.ly/ktW7SDW
14/11/2019	"Second Ukrainian Industrial Week"	The main goal of the event was to stimulate the use of modern approaches to increase the competitiveness of domestic industrial enterprises.	UA: https://cutt.ly/DtW7Dhr

Cherkasy region

Cherkasy region conducts many measures to increase investment attractiveness, promote the region and find partners abroad during the reorientation of Ukraine's export flows, for example:

- [Agroshow Ukraine 2019 International Agroindustrial Exhibition](#) 05/2019, organized by LLC «Bieych». The annual event has been held for the third year. It is a modern exhibition format that combines commercial, business and entertainment platforms. The event brings together farmers from different regions of Ukraine and foreign visitors. At the exhibition, leading companies will showcase machinery, plant protection products, seed, livestock equipment;
- [IV International Conference on Technology and Innovation: From Earth to the Finished Product](#) 03/2019, organized by Agricultural industry company "MAIS". The purpose of the conference remains unchanged: popularization and introduction of modern technologies of quality cultivation and processing of fruits, berries and nuts, promotion of traditional Ukrainian drinks based on fruits, berries and honey and production of value-added products;
- [Conference "Export of goods and services: Features of search for counterparties in the course of reorientation of Ukraine's export flows from the CIS to Europe, Africa, Asia and America"](#) 26/09/2019, organized by Cherkasy CCI. The purpose of the event is to summarize export development trends, identify problems and develop approaches to solve them.
- [Ukrainian-Belarusian Business Meeting](#) 29/06/2019, organized by Cherkassy CCI. In order to intensify Belarusian-Ukrainian business contacts in Cherkassy CCI, a business meeting and negotiations were held with representatives of Belarusian enterprises-members of the delegation of the Gomel CCI (Republic of Belarus).

More information on the above-mentioned and other events is in the table below.

Table 1.37. Overview of sector events in Cherkasy region

Date	Event	Description	Links
21/11/2019	IV Forum of development of housing cooperative	The purpose of the forum is to bring homeowners together to implement sustainable energy-efficient solutions	UA: https://cutt.ly/StW7Fv9
4-15/11/2019	Round table “#UAIndustryWeek2019: Cherkasy Region”	The purpose of the event is to increase the export potential of regional producers, create and develop industrial parks in Cherkassy region, namely: – export promotion; – smart specialization / clustering / industrial parks; – participation of domestic producers in international value chains.	UA: https://cutt.ly/8tW7GdE
09-10/2019	Training course "Start and develop your own business # 7".	Training for entrepreneurs and those who wanted to start their own business.	UA: https://cutt.ly/vtW7Hx0
During 2019 year	Business Training Seminar “How to pass checks without penalties”	The seminar is devoted to changes in the legislation, the procedure of implementation of complex planned measures of state supervision, grounds for inspecting the enterprises, basic rights and obligations of inspectors and employers, responsibility for non-compliance with the requirements of the legislation.	UA: https://cutt.ly/rtW7JAt
03/2019	IV International Conference on Technology and Innovation: From Earth to the Finished Product	The purpose of the conference is to promote and introduce modern technologies of quality cultivation and processing of fruits, berries and nuts, to promote the revival of traditional Ukrainian drinks based on fruits, berries and honey and to produce value-added products.	UA: https://cutt.ly/NtErz4a
09/11/2019	Regional Forum "GRANTING CHANGE 5.0: "Communities in Action: People-Ideas-Resources."	The purpose of the forum is to find youth innovation and create hubs; attraction of investments and development of civil society of Cherkasy region.	UA: https://cutt.ly/qtW7KOF
29/05/2019	Forum "Energy Effective Partnership and Renewable Energy of Cherkasy Communities"	They discussed the trends in the field of energy efficiency, renewable energy, the achievement of energy and construction sectors.	UA: https://cutt.ly/2tW7K3H
01/06/2019	Economic Forum OPEN BIZ	Forum «OPEN BIZ» – is a forum for business owners, top executives and community leaders.	UA: https://cutt.ly/cyUsAUG
15-16/05/2019	Training seminars within the framework of the project "Increasing the competitiveness of Ukrainian regions and developing Polish-Ukrainian economic cooperation"	Local government specialists participated in the activities and gained useful knowledge of the preparation rules and key elements of Greenfield and Brownfield investment proposals, the formation of the investment proposal base, the procedures for servicing the investor, incl. after investment support.	UA: https://cutt.ly/MtW7Zwa
05/2019	XII Organic Ukraine Regional Forum	The main topics of the forum: – state of organic production in Cherkasy region; – state support for organic production and farming in the region; – cooperation and cooperation of agricultural producers and processors; – technology of logistics, storage and formation of joint batches of organic products; – certification of organic production;	UA: https://cutt.ly/GtW7ZJC

Date	Event	Description	Links
		– support of organic certification.	
05/2019	AGROSHOW UKRAINE 2019 International Agroindustrial Exhibition	The exhibition presents leading companies that have demonstrated equipment, plant protection products, seeds, livestock equipment.	UA: https://cutt.ly/TtW7XGg
11/04/2019	Training for business "How to find a business partner abroad"	How to find a business partner abroad, prepare a business proposal, negotiate, get a free internship in Germany - these and other innovations and features of working in the economy 4.0 program experts told GIZ «Ready to cooperate with Germany».	UA: https://cutt.ly/mtW7CV9
15/11/2019	Training for exporters "International agreements: what it takes to effectively launch and manage exports", "Preventing risks in international trade"	Questions of interest to entrepreneurs: – What is required for a successful agreement scheme; – International Settlement Rules; – Counterparty evaluation and verification; – Permit documents and customs risks in logistics processes; – Training topics: – How to prevent risks in international trade; – How to calculate the cost in the target market.	UA: https://cutt.ly/xtW7VZs
13/04/2018	Training "COSME Program: Business Opportunities"	The training covered the features of work in the COSME program: – How to become a COSME program participant? – How to use Erasmus for Young Entrepreneurs? – How to use the European Cluster Collaboration Platform (ECCP) and the EEN network?	UA: https://cutt.ly/ftW7BDI
14/09/2019	USAID's Competitive Economy Program: USAID Campus in Cherkasy	The program includes presentations and workshops on women's entrepreneurship, business games on competitiveness and international trade. The experts shared the knowledge and skills of start-ups and experienced entrepreneurs.	UA: https://cutt.ly/9tW7NRn
27/02/2019	Business Grants	An event for those who want to learn about the principles of grants and current grant programs for business in Ukraine.	UA: https://cutt.ly/EtW7MaO
12/2019	5th contest "Cherkassy quality"	The competition was attended by 20 companies in the region, which declared 23 types of products: 13 food products; industrial goods for the population - 4; goods of industrial and technological purpose - 3; works and services - 3.	UA: https://cutt.ly/MtW71pH
26/09/2019	Ukrainian-Belarusian Business Meeting	In order to intensify Belarusian-Ukrainian business contacts in Cherkassy CCI, a business meeting and negotiations with representatives of Belarusian enterprises-members of the delegation of Gomel CCI (Republic of Belarus)	UA: https://cutt.ly/ftW718V
26/09/2019	Conference "Exports of goods and services: Features of search for counterparties in the course of reorientation of Ukrainian export flows from the CIS to Europe, Africa, Asia and America"	The purpose of the event is to summarize export development trends, identify problems and develop approaches to solve them.	UA: https://cutt.ly/JtW70Fz

Date	Event	Description	Links
25/03/2019	Discussion-training «European Projects Lab for NGOs»	Training is conducted by the Delegation of the European Union in Ukraine. The purpose is to explain the importance of implementing the Association Agreement between Ukraine and the European Union, the promotion of European values and raising the level of awareness among Ukrainians about the development of relations between Ukraine and the EU.	UA: https://cutt.ly/5tW72YZ

Kyiv region

The most important and biggest business events in the region are the following ones:

- [European Entrepreneurship Week in Ukraine](#) 10-11/2019, organized by Representation of the European Union in Ukraine. The event format is a business lunch, where entrepreneurs of the Kyiv region will be able to get answers to questions about where, where and how to export, how to develop a business climate, where to get money for business and how to distribute it to the masses;
- [Seminar “Financial and Credit Program for Supporting Small Businesses in Bila Tserkva”](#) 05/07/2019, organized by Kyiv Regional Employment Service. The purpose of the seminar is to present the work of the Ukrainian-German Fund and to provide services for employers who need additional credit;
- [Investor training – the training is an important part of the project "Increasing the competitiveness of Ukrainian regions and developing Polish-Ukrainian economic cooperation"](#) 13/05/2019, organized by project "Increasing the competitiveness of Ukrainian regions and the development of Polish-Ukrainian economic cooperation" (Poland). The training will look at the main methods of investor engagement and the latest approaches to attracting investment to the regions and the UTC.

More information on the above-mentioned and other events is in the table below.

Table 1.38. Overview of sector events in Kyiv region

Date	Event	Description	Links
10-11/2019	European Entrepreneurship Week in Ukraine	The event format is a business lunch, where entrepreneurs of the Kyiv region will be able to get answers to questions about where, how to export, how to develop a business climate, where to get money for business and how to distribute it to the masses.	UA: https://cutt.ly/ttW79mb
06/09/2019	Regional Seminar “Increasing the Energy Efficiency of Territorial Communities of Kyiv Region”	In the framework of workshop the following topics were discussed the main directions and tools for financing projects from budgets of all levels.	UA: https://cutt.ly/xtW790o
05/07/2019	Seminar "Financial and Credit Program for Supporting Small Businesses in Bila Tserkva"	The purpose of the seminar is to present the work of the Ukrainian-German Fund and to provide services for employers who need additional credit.	UA: https://cutt.ly/6tW73VK

Date	Event	Description	Links
13/05/2019	Investor training	The training is an important part of the project "Increasing the competitiveness of Ukrainian regions and developing Polish-Ukrainian economic cooperation". Among the issues discussed during the training were the main methods of investor engagement and the latest approaches to attracting investment to the regions and the UTC.	UA: https://cutt.ly/1tW78Xd
10/04/2019	Forum "Energy Efficient Partnership of Kyiv Communities"	Key topics of the Forum: state policy on energy efficiency; financial and technical resources to implement energy efficiency measures for housing cooperatives.	UA: https://cutt.ly/AtW74En
20/03/2019	Roundtable on improving the quality of protection of the rights of investors and entrepreneurs of the Kyiv region	The goals and objectives of the roundtable are to discuss the problem of protecting the rights of investors and entrepreneurs in Ukraine and the Kyiv region, and ways to solve it with the support of the international community.	UA: https://cutt.ly/7tW77fW

Zhytomyr region

Zhytomyr region pays considerable attention to the promotion of the region and support and promotion of small and medium-sized enterprises. The most important and biggest events in Zhytomyr region are the following ones:

- [Second Forum of the Regions of Ukraine and the Republic of Belarus](#) 10/2019. During the two-day forum there were: eco-forum, forum and exhibition of high technologies, robotics, mechatronics and startups, round table on the preservation of the language environment. The participants get acquainted with the producers of food, textile, decorative and industrial products of the two countries;
- [Ukrainian-Polish Business Forum](#) 18/10/2019, organized by Zhytomyr Regional Development Agency. The purpose of the business forum is to establish close economic ties, to present ready-made investment projects for cooperation and to strengthen international relations. The Forum is the perfect platform for sharing experiences and direction for new activities;
- [Meeting with representatives of the International Trade Club](#) 12/04/2019, organized by International Trade Club. Representatives from more than 20 countries participated in the business meeting. Participants were introduced to the investment opportunities of the region and proposals for attracting investments.

More information on the above-mentioned and other events is in the table below.

Table 1.39. Overview of sector events in Zhytomyr region

Date	Event	Description	Links
18/03/2019	Seminar "Microbusiness in Ukraine: the European experience"	Main topics of the seminar: – European Enterprise Network and its opportunities for microbusinesses and family businesses. – How to organize micro-enterprise activities to avoid fines. – State and opportunities for development of microbusiness in Ukraine. – Program "Available credits 5-7-9%" and its opportunities for the Ukrainian microbusiness. – A portal for small and medium business gov.ua and its practical benefit for the entrepreneur. – Business Support Tools from the Export Promotion Office of Ukraine. – Start the Business Challenge and its opportunities to start your own business.	UA: https://cutt.ly/TtW75Hz ENG: https://cutt.ly/cyUkxuh
06/12/2019	Conference "Public-Private Partnership - as a Tool for Attracting Investment in Community Development"	To get acquainted with the successful practices of preparation and implementation of public-private partnership projects at the local level, application of concessions and other forms of public-private partnership, presentation of pilot projects supported by the U-LEAD Europe Program	UA: https://cutt.ly/ZtW756W
22/11/2019	The second meeting within the framework of the program "Dialogues about Ukraine"	Discussed the benefits and problems of large-scale land reform.	UA: https://cutt.ly/btW76Fy
4-15/11/2019	Round table within the framework of the Second Ukrainian Industrial Week	Digital transformation of industry Export promotion Industrial parks	UA: https://cutt.ly/ntW5qje ENG: https://cutt.ly/xyUkRRa
10/2019	The Second Forum of the Regions of Ukraine and the Republic of Belarus	During the forum the following took place: eco-forum, a forum and an exhibition of high technology, robotics, mechatronics and startups, Roundtable on preserving the language environment. The participants get acquainted with the producers of food, textile, decorative and industrial products of the two countries.	UA: https://cutt.ly/itW5q7z https://cutt.ly/MtW5wHf https://cutt.ly/MtW5ejP
12/04/2019	Meeting with representatives of the International Trade Club	Participants were introduced to the investment opportunities of the region and proposals for attracting investments.	UA: https://cutt.ly/0tW5rS0
26/02/2019	«How to increase investment in the economy of Zhytomyr region»	The discussion on "How to increase investment in the economy of Zhytomyr region" was held today, February 26, in the format "World Cafe".	UA: https://cutt.ly/VtW5tUK
08/02/2019	Training "EU Grant Project Management for Advanced Applicants"	The training was conducted from question-answer sessions to outline a number of obstacles that you may encounter while designing a project.	UA: https://cutt.ly/etW5yyK
01/06/2019	Online course "Food Safety: Current Legislation, Conscientious Producer, Responsible Consumer"	This course is dedicated to the design, implementation and maintenance of procedures based on the principles of hazard analysis and critical control.	UA: https://cutt.ly/CtW5yMC
During	«Information-	The seminars discussed issues related to supporting	UA: https://cutt.ly/ltW5uvR

Date	Event	Description	Links
2019 year	consulting seminars for small and medium-sized enterprises and those wishing to engage in entrepreneurial activity»	and facilitating the development of small and medium-sized enterprises and the Program «Fit for Partnership with Germany».	
18/10/2020	Ukrainian-Polish Business Forum	The purpose of the business forum is to establish close economic ties, to present ready-made investment projects for cooperation and to strengthen international relations. The Forum is the perfect platform for sharing experiences and direction for new activities.	UA: https://cutt.ly/CtW68QG https://cutt.ly/vtW5u87
15/02/2019	Seminar "Participation in European Trade Forums and Exhibitions"	The main topics of the event: Steps to success of trade missions of Ukrainian entrepreneurs Promotion of goods and services in the Enterprise Europe Network. EEN calendar as an effective method of finding specialized business events and contacts with potential buyers, partners and investors. SMEDO opportunities for Ukrainian business. Trade missions - expanding business prospects and more.	UA: https://cutt.ly/6tW5i2f

Vinnytsia region

The most important and biggest events in Vinnytsia region are the following ones:

- [“Business in the Center of Ukraine”](#) 09/2019. The International Investment Forum is being held with the purpose of intensifying economic cooperation, presenting the investment, economic, agro-industrial and energy potential of Vinnitsa region, as well as establishing new partnership contacts and establishing mutually beneficial cooperation;
- [International Forum "Intensive Garden - 2019"](#): seed and stone fruit " + exhibition of suppliers to the fruit and berries sector, 27-28/11/2019. Key topics of the forum: technologies of industrial cultivation of seed and stone fruit trees, improving quality, challenges of the modern market, the quality of planting material and the legal use of new varieties. The forum "Intensive Garden - 2019" was attended by growers, traders, local and international suppliers of materials, knowledge institutions, sector associations and media. Organizer of the forum: AGP Group.
- [International Forum + exhibition “Industrial Berries Production - 2019”](#) – 26.11.2019. The focus of the event was on production, post-harvesting processing, processing and market requirements for berries. The forum was attended by growers, processing companies, consultants and suppliers to the sector. Organizer of the forum: AGP Group.
- [Round table “Problems and prospects of industrial development in Vinnitsa region”](#) 14/11/2019, organized by Vinnytsia CCI. The purpose of the event is to use modern approaches to increase the competitiveness of domestic industrial enterprises, to get practical feedback from businesses on the problems and obstacles to industrial transformation

– [Swedish Business Day](#) 18/02/2019, organized by Swedish Business Association in Ukraine, Embassy of Sweden in Kyiv. The event is organized by the Swedish Business Association in Ukraine, with the purpose of presenting the investment potential of Vinnitsa region, decisions of Swedish companies for Ukrainian business and establishing mutually beneficial contacts. The delegation of Swedish business, which will include manufacturers of special equipment machinery, metal structures, vehicles.

More information on the above-mentioned and other events is in the table below.

Table 1.40. Overview of sector events in Vinnytsia region

Date	Event	Description	Links
09/2019	VII International Investment Forum "Vinnytsia Region - Business in the Center of Ukraine"	The purpose - activation of economic cooperation, presentation of investment, economic, agro-industrial and energy potential of Vinnitsa region.	UA: https://cutt.ly/NtEwDDg ENG: https://cutt.ly/1yUIJLE
14/11/2019	Second Ukrainian Industrial Week. Round table "Problems and prospects of industrial development in Vinnitsa region"	The purpose of the event is to use modern approaches to increase the competitiveness of domestic industrial enterprises.	UA: https://cutt.ly/JtEw0pP
18/02/2019	Swedish Business Day	The purpose is to present the investment potential of the Vinnytsia region, the decisions of Swedish companies for Ukrainian business and to establish mutually beneficial contacts.	UA: https://cutt.ly/mtEw9s3
14/02/2019	Annual Credit Fair. Seminar "Financial and material resources for agricultural business"	The event was aimed at informing the agrarian business entities about available financial products, new trends in the financial services market, mechanisms for attracting financial and logistical resources for agribusiness, as well as getting acquainted with state agri-business support programs.	UA: https://cutt.ly/KtW5o9p
04/03/2019	Project «JOURNEY»	The key objective of the project is to reduce unemployment and promote the entrepreneurial potential of rural youth in the Eastern Partnership	UA: https://cutt.ly/VtW5ado
20/03/2019	Conference "Strategic Directions for Fruit and Berry Sector Development and Cooperation"	The conference participants received information on product certification and market promotion and online.	UA: https://cutt.ly/YtW5sgE
28/11/2019	International Forum "Intensive Garden - 2019: stone + seed fruit"	Key topics of the forum: technologies of industrial cultivation of seed and stone fruit trees, improving quality, challenges of the modern market, the quality of planting material and the legal use of new varieties. The forum "Intensive Garden - 2019" was attended by growers, traders, local and international suppliers of materials, knowledge institutions, sector associations and media.	UA: https://cutt.ly/0tW5dfR
11-12/06/2019	Training for farmers "Management of agricultural enterprises finances"	The participants of the meeting were told about the possibility of receiving assistance from the regional and state budgets	UA: https://cutt.ly/FtW5gCL
22/11/2019	Land Forum	Focus - development of the agrarian sector of Ukraine	UA: https://cutt.ly/6tW5hAB
28/11/2019	XV regional forum "Organic Ukraine.	The forum is organized to share experiences and discuss ways to develop organic production	UA: https://cutt.ly/XtW5jb7

Date	Event	Description	Links
	Vinnytsia".		
03/12/20129	Youth Regional Forum «Working in Ukraine NOW»	Partnership between business, government and education	UA: https://cutt.ly/ItW5kER
08/10/2019	III Regional Forum of Community Initiatives	The work of the forum was in the format "World cafe": "i change", which provides a joint discussion of ways to solve key problems of cooperation between the authorities and the community of Vinnytsia.	UA: https://cutt.ly/ntW5ILc
15/02/2019	Seminar "Participation in European Trade Forums and Exhibitions"	The main topics of the event: Steps to success of trade missions of Ukrainian entrepreneurs Promotion of goods and services in the Enterprise Europe Network. EEN calendar as an effective method of finding specialized business events and contacts with potential buyers, partners and investors. Opportunities from SMEDO (Office of Small and Medium Business Development) for Ukrainian business. Trade missions - expanding business prospects and more.	UA: https://cutt.ly/mtW5zGL

Chernihiv region

Unfortunately, only regional sectoral events took place in the Chernihiv region, although some of them occur annually. The most important and greatest of them are:

- ["Organic Invest" Regional Forum](#) 26/02/2019, the purpose of the forum is ways to attract additional investments, tools to support small and medium-sized businesses in the agro-industrial complex. The participants got acquainted with the best practices of organic production and the application of innovative and scientific approaches in the organics;
- [Business Fest "Together for Success"](#) 01/09/2019 – together with Success Business Festival was held for the first time in Chernihiv on September 2, 2017. Chernihiv Region Local Business Festival;
- [Chernihiv Regional Innovation Forum](#) 22/11/2019 – the forum is a platform for discussing technological trends, sharing experiences, presenting innovative solutions to develop your own potential and build collaboration. The discussion panels will discuss current trends of innovative development, ecosystem of innovation: science - innovation - business, available financial instruments to support innovation and entrepreneurship, regional infrastructure for the development of entrepreneurial initiatives and creation of innovative products.

More information on the above-mentioned and other events is in the table below.

Table 1.41. Overview of sector events in Chernihiv region

Date	Event	Description	Links
28/02/2019	Forum of the real sector of economy of Chernihiv region	The purpose of the forum is to ensure effective cooperation of entrepreneurship with the authorities in support of sustainable development of Ukrainian industry.	UA: https://cutt.ly/vtW5cce ENG: https://cutt.ly/kyUzFmq
29/11/2019	VI Forum of the League of Business and Professional Women of Ukraine	Business development in times of change. How to transform a company and stay profitable?	UA: https://cutt.ly/4tEqLhL UA: https://cutt.ly/mtW5c3W
01/09/2019	"Together for Success" Business Fest	Chernihiv Region Local Business Festival	UA: https://cutt.ly/utEqXE2 UA: https://cutt.ly/otW5vHW
22/11/2019	Chernihiv Regional Innovation Forum	Discussion panels talked about current trends of innovative development, ecosystem of innovation: science - innovation - business, available financial instruments to support innovation and entrepreneurship, regional infrastructure for the development of entrepreneurial initiatives and the creation of innovative products.	UA: https://cutt.ly/5tW5bWv
16/10/2019	Regional forum "WOMEN IN..."	The purpose of the forum is to support women producers, entrepreneurs and those who want to start their own business.	UA: https://cutt.ly/btW5b2h
08/2019	V Milk Festival	The purpose of the festival is to promote the products of local dairy producers.	UA: https://cutt.ly/ftW5nQP
26/02/2019	"Organic Invest" Regional Forum	The purpose of the forum is ways to attract additional investments, tools to support small and medium-sized businesses in the agro-industrial complex. The participants got acquainted with the best practices of organic production and the application of innovative and scientific approaches in the organics.	UA: https://cutt.ly/atW5mmB ENG: https://cutt.ly/gyUzR9A

Kirovograd region

The most important and biggest business events in the region are the following ones:

- [VII International Agricultural Exhibition with field demonstration equipment AgroExpo-2019](#) 09-10/2019, – the biggest agricultural event. About presentation of presented expositions of presented domestic and foreign agricultural producers, seeds, good used, stored and overlapped, which are located in open areas and in these areas;
- [The 2019 AgroDay Annual Agroconference](#) 25/11/2019, Kirovograd CCI. The purpose of the conference is to provide Ukrainian farmers with up-to-date information about an accessible program that is operated, used and existing by the organization.

More information on the above-mentioned and other events is in the table below.

Table 1.42. Overview of sector events in Kirovograd region

Date	Event	Description	Links
09-10/2019	VII International Agricultural Exhibition with field demonstration equipment AgroExpo-2019	The biggest agricultural event. The exhibition presents the expositions of leading domestic and foreign producers of agricultural machinery, seeds, fertilizers, plant protection products, storage and processing of products on open areas and in the pavilion. The total number of exhibitors is about 600.	UA: https://www.ukragroexpo.com/
27/09/2019	Municipal Investment Forum «TIME to INVEST»	The purpose of the forum is to intensify the development of domestic and inbound tourism, the promotion of regional tourism product to Ukrainian and international markets, the promotion of tourist opportunities and little-known objects of the Kirovograd region.	UA: https://cutt.ly/9tEp87i
25/11/2019	Annual agro-conference AgroDay 2019	The purpose of the conference is to provide up-to-date information to Ukrainian farmers about access to state, financial and institutional support programs for the industry.	UA: https://cutt.ly/wtEp737
318/10/2019	Conference "Prospects for beekeeping development in Kirovograd region"	The purpose of the event is to help the beekeepers of the region and their associations to increase the efficiency of their activities, to familiarize them with perspective technologies. The conference will also discuss the issues of increasing profitability and value creation in beekeeping.	UA: https://cutt.ly/OtEp5XE
30/05/2019	Conference "Development of Goat Cooperative - Opportunities and Prospects"	The conference will help unite the efforts of private farm owners and goat farms to increase their competitiveness in a market environment.	UA: https://cutt.ly/WtEp6dM
21/05/2019	Ukraine-China Business Meeting	The purpose of the meeting is to familiarize Chinese investment groups with Ukrainian proposals for investment projects in the field of construction and agriculture.	UA: https://cutt.ly/OtEp67X
12/06/2019	Ukraine-Pakistan Business Meeting and Ukraine-Tunisia Business Meeting	Partners from Pakistan and Tunisia have expressed interest in co-operation in such areas as agriculture, real estate, food processing, textile, medical equipment, tourism, car spare parts.	UA: https://cutt.ly/0tEaqMf
28/03/2019	Seminar "Participation in European Trade Forums and Exhibitions: Opportunities for Ukrainian Business"	Promotion of goods and services in the Enterprise Europe Network Practical tips for participating in trade shows Horizon 2020 opportunities and challenges for business entities and others.	UA: https://cutt.ly/mtEawBh
11-12/09/2019	Training "SME Participation in Public Procurement"	Training participants will acquire practical skills in tender documentation and will learn how to work with the system "PROZORRO"	UA: https://cutt.ly/RtEaeO8

Table. 1.43. Exhibitions and fairs in Khmelnytskyi region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Christmas Fair	Khmelnyskiy, Ukraine, Prybuzka str.	January	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua	Agricultural products and catering
Easter Fair	Khmelnyskiy, Ukraine, Prybuzka str. Square near T. Shevchenko Cinema	05 – 26 April	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua Trade Department of City Council, 88 Hrushevskoho str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 65-61-26, tel.: (0382) 65-11-41, e-mail: trade@khm.gov.ua	Agricultural products and catering
Kharkivskyy Fair	Kamianets-Podilskyi, Ukraine, Square near Cinema “Yunist”	29 April – 12 May	Private entrepreneur Tserkovna Iryna Mykolayivna tel.: (095) 113-90-00, tel.: (097) 918-35-05	Light industry fair Ukrainian manufacturers
Low-growing Fast- Growing Nuts Exhibition-fair	Kamianets-Podilskyi, Ukraine	June	All-Ukrainian Public Organization “Ukrainian Nut Association”, 52 Starokozatska str., office 267, Dnipro, Ukraine, 49089 tel./fax: (056) 770-23-36, tel.: (067) 523-09-85, www.ukr-nuts.org e-mail: dobrobut.agro2002@gmail.com	Nut Farming Gardening

ITFC - Ukrainian Industry Expertise

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
National Farm Day Exhibition-fair	Khmelnyskiy region, Ukraine, Bilohirskiy Raion, Bilohiria LLC "Perlyna Podilya"	15 August	Ukrainian Agrarian Council, Association of Milk, tel.: (067) 236-39-66, www.farmday.com.ua	Dairy Cattle Breeding
Agro-Podillya Exhibition-fair	Khmelnyskiy, Ukraine, Kamyanets str., Trading and service center "Podillya"	September	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua	Presentation of the best samples of products and goods of local enterprises in each rayon of the region, institutions of vocational education, individual higher educational institutions and forestry
Fair to the Day of the City	Khmelnyskiy, Ukraine, Prybuzka str.	September	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua	Agricultural products and catering
Fair for Agricultural Day	Khmelnyskiy, Ukraine, Prybuzka str.	November	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua	Agricultural products and catering
New Year's Eve of the Agricultural Fair	Khmelnyskiy, Ukraine, Prybuzka str.	December	Department of Agro-Industrial Development of Khmelnyskiy Regional State Administration, 70 Svobody str., Khmelnyskiy, Khmelnyskiy region, Ukraine, 29000, tel.: (0382) 79-46-33, e-mail: dagro@adm-km.gov.ua	Agricultural products and catering

Table. 1.44. Exhibitions and fairs in Zhytomyr region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Presentation of the Capacity and Achievements of Zhytomyr Region Exhibition within the framework regional forum “Zhytomyr Region – Area for Opportunities”	Zhytomyr, Ukraine	May	Zhytomyr Regional State Administration, Department for Agro-Industrial Development and Economic Policy, 25 Mala Berdichivska str., Zhytomyr, Ukraine, 10014, tel.: (0412) 47-38-83, e-mail: ekonomika@zt.ukrtel.net	Manufacturing sector, energy sector, culture and tourism, education, security sector, achievement of communities of the region
ZT-Expo Tourist Exhibition	Zhytomyr, Ukraine	May	Municipal institution Zhytomyr Regional Tourist Information Centre of Zhytomyr Regional Council, 25 Mala Berdichivska str., Zhytomyr, Ukraine, 10014, www.tic.zt.ua	Development and promotion of the tourism potential in region
National Farm Day Exhibition-fair	Zhytomyr Region, Novohrad-Volynskyi Raion, Stryieva, Private Enterprise “Galeks-Agro”	18 June	Ukrainian Agrarian Council, Association of Milk Producers, tel.: (067) 236-39-66, www.farmday.com.ua	Dairy Cattle Breeding
Brusvyana-Ukraine Regional exhibition-fair	Kostivtsi, Zhytomyr Region, Brusylivskyi Raion	13 July	Brusvyana LLC, tel.: (4162) 3-18-58, www.brusvyana.com.ua , e-mail: brusvyana@ukr.net	Popularization of Berry Crops, their Growing and Consumption
Weekend in Olevsk Exhibition-fair	Olevsk, Zhytomyr Region	July	Olevsk City Council of Zhytomyr Oblast tel.: (4135) 2-11-52 e-mail: olevsk_miskrada@ukr.net	Popularization of Growing and Consumption of Blueberries

ITFC - Ukrainian Industry Expertise

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Honey Fair Exhibition-fair	Zhytomyr, Ukraine	August	Zhytomyr Regional State Administration, Department for Agro-Industrial Development and Economic Policy, 25 Mala Berdichivska str., Zhytomyr, Ukraine, 10014, tel.: (0412) 47-38-83, e-mail: economika@zt.ukrtel.net	Beekeeping Products
Flax Festival Regional fair	Stremyhorod, Zhytomyr Region, Korostenskyi Raion	August	Private Rented Agricultural Enterprise “Zorya”, tel.: (4142) 5-59-03, www.zorya-agro.com e-mail: zorya.agro@gmail.com	Flax and Organic Products
International Deruny Festival Regional fair	Korosten, Zhytomyr Region, Tsentrалnyi Park	September	Korosten City Council of Zhytomyr Region, tel.: (4142) 4-31-84, tel.: (4142) 9-61-88, e-mail: ikz-kor@rada-kor.gov.ua	Popularization of Ukrainian National Cuisine (including Potato Pancakes)
Medivka Fest Exhibition-fair	Zhytomyr, Ukraine	October	Zhytomyr Regional State Administration, Department for Agro-Industrial Development and Economic Policy, 25 Mala Berdichivska str., Zhytomyr, Ukraine, 10014, tel.: (0412) 47-38-83, e-mail: economika@zt.ukrtel.net	Beekeeping Products

Table. 1.45. Exhibitions and fairs in Vinnytsia region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Arthaleria Interregional exhibition of art works	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	10 – 19 January	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Painting, graphics, sculpture
Winter Sale Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	21 – 24 January	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Clothing and Footwear. Leather goods. Fur products. Knitwear clothes
Fashion Boutique Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	04 – 07 February	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Clothing and Footwear. Leather goods. Fur products. Knitwear clothes
Household Farming Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	12 – 15 February	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seeds. Seedlings. Plant protection and pest control products. Minor equipment and tools. Fertilizers

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Product Industry Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	19 – 21 February	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food and Beverages. Food machines, Food packaging
All for Women! Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	25 – 28 February	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Leather goods. Knitwear products. Underwear. Stockings, socks. Home Textiles. Textile haberdashery
Style. Clothes Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	04 – 07 March	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Outerwear. Underwear. Knitwear. Footwear. Leather goods. Hats. Cosmetics. Perfumes. Bijouterie. Souvenirs
Energy consumption. Energy savings Interregional specialized exhibition	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	11 – 13 March	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Technologies and equipment for water, heat and electricity consumption. Ventilation systems, air conditioning, lighting. Energy- efficient and resource-saving technologies and equipment. Instruments and systems for recording heat and other types of energy

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Spring Garden Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	18 – 21 March	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seeds, seedlings, planting material. Potted and Ornamental plants. Plant protection and pest control products. Landscape design. Inventory. Tools
Spring Fashion Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	24 – 27 March	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Leather goods. Knitwear products. Underwear. Stockings, socks. Home Textiles. Textile haberdashery
Blooming Garden Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	01 – 04 April	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seeds, seedlings, planting material. Potted and Ornamental plants. Plant protection and pest control products. Landscape design. Inventory. Tools
Fashion salon. Spring Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	07 – 10 April	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Author's collections. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry. Footwear. Stockings, socks. Leather goods
Easter Fair Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	15 – 17 April	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/	Food and processing industry products. Light industry products. Easter souvenirs

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Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
			e-mail: expo@cci.vn.ua	
Construction Market Interregional specialized exhibition	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	22 – 24 April	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Design, construction. Construction and finishing materials. Roofing. Insulation. Windows, doors, gates. Tools. Interior
Style. Summer Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	12 – 15 May	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Services of travel agencies. Sports equipment. Active leisure equipment. Seasonal clothing. Footwear. Leather goods. Cosmetics. Perfumes. Drugs and Cosmetics
Fashion salon. Summer Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	26 – 29 May	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Leather goods. Products for summer holidays. Hats. Knitwear products. Underwear. Corsetry
Podillia Fair Regional exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	03 – 05 June	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Fashion. Leisure Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	09 – 12 June	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Leather goods. Products for summer activities. Hats. Knitwear products. Underwear. Corsetry
Art Exhibition Interregional universal exhibition	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	02 – 12 July	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Works of Padilla artists: Painting, graphics, sculpture
Bread and Honey Fair Interregional exhibition- fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	09 – 21 July	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products
Clothes. Footwear. Textile Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	25 – 28 August	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Leather goods. Knitwear products. Underwear. Stockings, socks. Home Textiles. Textile haberdashery
Fashion Vernissage Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	01 – 04 September	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/	Clothing and Footwear. Leather goods. Fur products. Knitwear clothes

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Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
			e-mail: expo@cci.vn.ua	
Podillia Fair Regional exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	09 – 11 September	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products
Modern House Interregional specialized exhibition	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	16 – 18 September	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Technologies and construction and repair services. Building, roofing and paint materials. Windows, doors. Heating, air conditioning, plumbing. Interior details, lighting, decoration. Real estate, crediting, insurance
Interior. Furniture. Woodwork Interregional specialized exhibition	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	16 – 18 September	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Furniture for residential premises and offices. Furniture and interiors planning and design, decorative items. Accessories. Woodworking equipment and tools
Fashion salon. Autumn Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	22 – 25 September	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry, Hats, Umbrellas. Cosmetics, perfumes

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Cottage. Garden. Landscaping Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	30 September – 03 October	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seeds, seedlings, planting material. Potted and Ornamental plants, phytodesign. Landscaping and greening. Plant protection and pest control products. Minor equipment and tools
Autumn Fairs Agricultural fairs	Vinnytsia, Ukraine, 117-B, Keletska str., Plaza Park	September – October	Department of Agricultural Development, Ecology and Natural Resources of Vinnytsya Regional State Administration, 15-A Soborna str., Vinnytsia, Ukraine, 21100, tel.: (0432) 67-08-20, e-mail: upr_agro@vin.gov.ua	Agricultural Products
Fashion style. Autumn Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	06 – 09 October	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry, Hats, Umbrellas. Cosmetics, perfumes
Autumn Garden Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	14 – 17 October	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seeds, seedlings, planting material. Potted and Ornamental plants, phytodesign. Landscaping and greening. Plant protection and pest control products. Minor equipment and tools
World of Fur and Leather Interregional specialized exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	20 – 23 October	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Leather clothes. Footwear. Fur products

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Podillia Fair Regional exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	28 – 30 October	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products
Autumn Sale Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	03 – 06 November	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry, Hats, Umbrellas. Cosmetics, perfumes
Winter Update Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	17 – 20 November	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Seasonal clothing. Footwear. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry, Hats, Umbrellas. Cosmetics, perfumes
Podillia Fair Regional exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	25 – 27 November	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products
Fashion salon. Winter Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	01 – 04 December	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/	Seasonal clothing. Footwear. Accessories and bijouterie. Knitwear products. Casual clothes. Underwear. Corsetry, Hats, Umbrellas. Cosmetics, perfumes

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
			e-mail: expo@cci.vn.ua	
New Year Fair Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	15 – 18 December	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Gifts. Christmas trees and Christmas tree decorations. Pyrotechnics. Clothes. Footwear. Knitwear products. Leather goods. Products for winter activities. Cosmetics, perfumes
Christmas Gifts Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	22 – 25 December	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Gifts. Christmas trees and Christmas tree decorations. Pyrotechnics. Clothes. Footwear. Knitwear products. Leather goods. Products for winter activities. Cosmetics, perfumes
Festive Kaleidoscope Interregional universal exhibition-fair	Vinnytsia, Ukraine, 68 Soborna str., Expocenter of Vinnytsia Chamber of Commerce and Industry	28 – 30 December	Expocenter of Vinnytsia Chamber of Commerce and Industry (CCI), 68 Soborna str., Vinnytsia, Ukraine, 21050, tel./fax: (0432) 52-59-52, tel.: (067) 726-21-22, http://expo.vn.ua/ua/ e-mail: expo@cci.vn.ua	Food, beverages, confectionery products Gifts. Christmas trees and Christmas tree decorations. Pyrotechnics. Clothes. Footwear. Knitwear products. Leather goods. Bijouterie

Table. 1.46. Exhibitions and fairs in Kyiv region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Space Fantasies Competition-exhibition	Boryspil, Ukraine, Kyiv region, 8 Heroiv Nebesnoi Sotni str., Boryspil District House for Children and Youth Creativity	10 – 21 February	Boryspil District House for Children and Youth Creativity, 8 Heroiv Nebesnoi Sotni str., Boryspil, Ukraine, 08300 tel.: (04595) 5-06-16, e-mail: rbdutbr@ukr.net	Regional exhibition of decorative and applied and fine arts
Sugar World International Sugar Congress	Brovary, Ukraine, Kyiv region, 316, Kyivska str. Terminal	February	Ukrainian Agrarian Council Ukrtsukor, tel.: (067) 503-84-38, http://sugarworld.org	Sugar Industry
International Field Days in Ukraine	Doslidnytske, Ukraine, Kyiv region, Vasylkivskiy raion	June	State Scientific Organization Leonid Pogorilyy Ukrainian Scientific Research Institute of Forecasting and Testing of Machinery and Technologies for Agricultural Production (Leonid Pogorilyy UkrNDIPVT), tel.: (04571) 3-36-57, e-mail: ndipvt@ukr.net	The Dissemination of Knowledge in Real Field Conditions about Latest Agrotechnological Techniques and Technical Means for their Implementation, Effective Means of Care for Plants and the Experience Exchange
Medovyi Spas	Obukhiv, Ukraine, Kyiv region	August	Department of Department of Agro-Industrial Development of Kyiv Oblast 13/1, Velyka Vasylkivska, Kyiv, 01004, tel.: (044) 234-63-24, e-mail: kancelaria@guapr.kiev.ua	Apiculture
On The White Wings Of The Towel Come Hope To Ukraine District exhibition	Makarov, Ukraine, Kyiv region, District House of Culture	19 – 25 August	Makariv District House of Culture, 27 Dimitri Rostovsky str., smt. Makarov, Ukraine, Kyiv region, tel.: (04578) 5-20-41	District exhibition of embroidered towels

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Exhibition of the Best Folk Art Items	Obukhiv, Ukraine, Kyiv region	September	Department of Culture, Nationalities and Religions, 117 Kyivska str., Obukhov, Ukraine, Kyiv region, tel.: (04572) 5-19-78	Folk Art Exhibition
Clash of the Agrotitans Exhibition and Demonstration of the Agrimachinery	Stepove, Kyiv region, Tetiiv district,	September	Ukrainian Agrarian Council, tel.: (067) 503-84-38 http://agrotitans.com.ua/	Agricultural Machinery
Ukrainian Souvenir Competition-exhibition	Boryspil, Ukraine, 8 Heroiv Nebesnoi Sotni str., Boryspil District House for Children and Youth Creativity	05 – 12 October	Boryspil District House of Children and Youth Creativity, 8 Heroiv Nebesnoi Sotni str., Borispol, Kyiv region, Ukraine, tel.: (04595) 5-06-16, e-mail: rbdutbr@ukr.net	Regional exhibition of decorative and applied and fine arts
International Pig Farm Day Exhibition-fair	Glevakha, Ukraine, Kyiv region, Conference Hall	October	Ukrainian Agrarian Council, Pig Association of Ukraine, tel.: (067) 236-39-66, http://pigday.com.ua/	Pig breeding
Exhibition of needlework of the City Festival of Folk Art Competition “Obukhiv Sewed Towel”, dedicated to the 107th anniversary of the birth of poet A. Malushko	Obukhiv, Ukraine, Kyiv region	November	Department of Culture, Nationalities and Religions, 117 Kyivska str., Obukhov, Ukraine, Kyiv region, tel.: (04572) 5-19-78	Exhibition of needlework

Table. 1.47. Exhibitions and fairs in Chernihiv region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Milk Fest	Chernihiv, Ukraine, Central Park of Culture and Rest	IV Decade of August	Department of Agro-Industrial Development, Ecology and Natural Resources of Chernihiv Regional State Administration, tel.: (0462) 77-89-37	Sale of Agricultural and Food Products
Pryluky Interregional Vozdvyzhensky Fair	Chernihiv region, Pryluky, the center of Pryluky	September	Pryluky City Council, 82 Nezalezhnosti str., Pryluky, Chernihiv region, 17500, tel.: (04637) 3-11-00, tel.: (04637) 3-02-42, e-mail: ekonomica@ukr.net	Manufacturers of foodstuffs and industrial goods, agricultural products, products of beekeeping. Arts and crafts artisans. Entertainment and restaurant business
Nizhynsky Pokrovsky Fair	Chernihiv region, Nizhyn, Square Ivan Franko, Hoholia str., Moskovska str., Batiuka str., Naberezhna str.	The second week of October	Executive Committee of the Nizhyn City Council, 1 Square Ivan Franko, Nizhyn, Chernihiv region, 16600, tel.: (04631) 2-53-36, e-mail: nemrada_post@cg.gov.ua	Exhibition and sale of local manufacturers. Arts and crafts exhibitions
Salo Fest	Chernihiv, Ukraine, Krasna Ploshcha	III Decade of December	Department of Agro-Industrial Development, Ecology and Natural Resources of Chernihiv Regional State Administration, tel.: (0462) 77-89-37	Agricultural Products and Food

Table. 1.48. Exhibitions and fairs in Cherkasy region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
Agroshow Ukraine International agro-industrial expo-fest	Cherkasy, Ukraine, The territory of Airport “Cherkasy”	16 – 19 May	Bieich LLC, Iryna Vashchenko, 36/1BaityVyshnevetskogo str., Cherkasy, Ukraine, tel.: (093) 060-31-06, www.agroshow.com.ua e-mail: agroshow.ua@gmail.com Department of agricultural development of Cherkasy Regional State Administration, 131 Smilianska str., Cherkasy, Ukraine, tel.: (0472) 36-07-60, e-mail: reform2010@apkck.gov.ua	Agricultural machinery and equipment, sowing materials, agrochemicals and fertilizers, innovative agro-technologies, equipment for agricultural small and medium sized enterprises, landscape design and garden centers
National Farm Day Exhibition-fair	Cherkasy region, Ukraine, Shpola LLC “Vidrodzhenia”	29 August	Ukrainian Agrarian Council, Association of Milk Producers, tel.: (067) 236-39-66 www.farmday.com.ua	Dairy Cattle Breeding

Table. 1.49. Exhibitions and fairs in Kyrovograd region – 2020

Name of the event	City and venue	Date	Organizer of the exhibition event and address	Specification
AgroExpo International agro-industrial exhibition with a field demonstration of technology	Kropyvnytskyi, Ukraine 8 Murmanska str., Exhibition Complex “Agroexpo”	30 September – 03 October	LTD “UkrAgroExpo”, 1A Eugene Chykalenko str., Suite 119, Kropivnitsky, Ukraine, 25006, tel./ fax: (0522) 30-15-66, https://www.ukragroexpo.com e-mail: info@ukragroexpo.com	Crop production – equipment and technologies; animal agriculture – equipment and technologies; transport and specialized equipment; packing and wrapping materials; construction in agricultural sector; alternative energy in agricultural sector; ecology and recycling; backyard farming; forestry

1.10. Key obstacles to the business development by sector of consideration

Within the framework of identifying main obstacles for the development of sectors under study in 7 Central Ukrainian regions 553 companies were contacted, of which 445 (80%) agreed to participate in the survey, and 108 (20%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

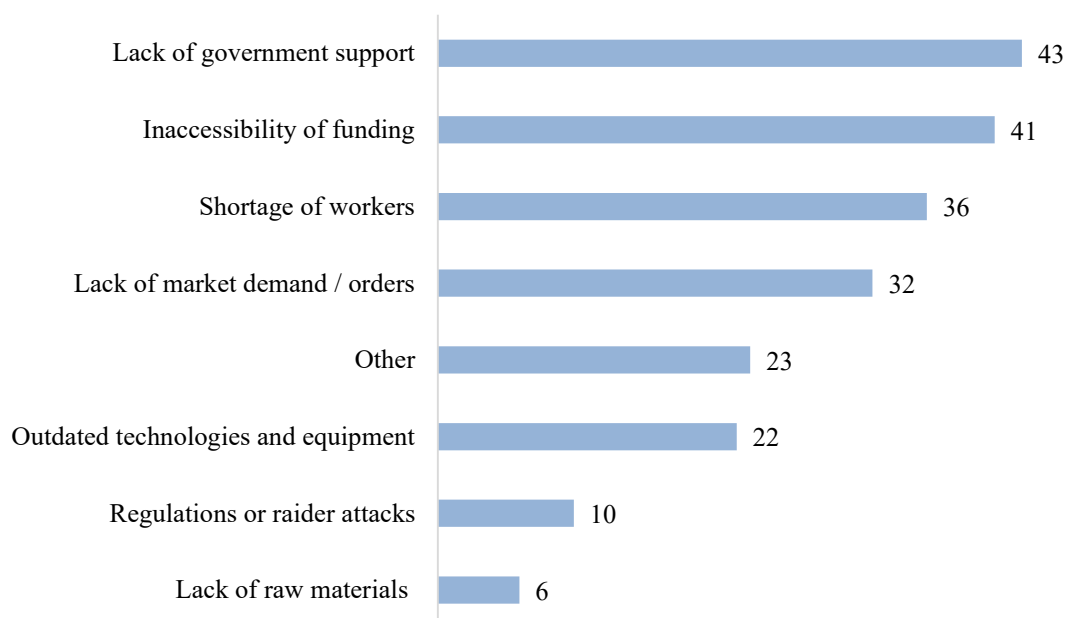


Fig. 1.13. The rating of main obstacles for the development of the defined sectors in 7 Central Ukrainian regions subject to the study, %

The sectors under study face some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (43%), inaccessibility of funding (41%) and shortage of workers (36%).

The main issue with financing appears to be two-fold. Bank interest rates at 22% are too high for the sectors under study, where margins are rarely above 20%. The other problem is access to finance for small businesses. In many cases they do not have detailed financial records, especially if they are using the Simplified Taxation system and cannot put up guarantees for loans.

The problem of lack of government support is multifaceted. It includes lack of professional training programs for the workers, non-transparent tenders, insufficient export promotion, and non-level playing field because of presence of shadow firms that operate under simplified taxation.

Central Ukraine companies experience difficulties with recruiting staff. This is compounded by outward migration to the EU. Salary is seen as poor, with little opportunity for advancement. The minimum wage required to keep skilled workers is about UAH 14 000 - 15 000 (€540-580) per

month. Salary could be poor for a number of reasons, but the main problem is relatively low productivity. Any measures that improve productivity will enable factories to pay their staff more.

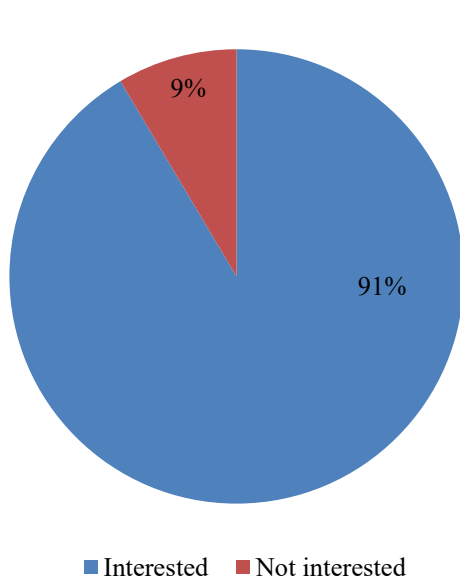


Fig. 1.14. The interest of sectors under investigation enterprises in cooperation with the Dutch business

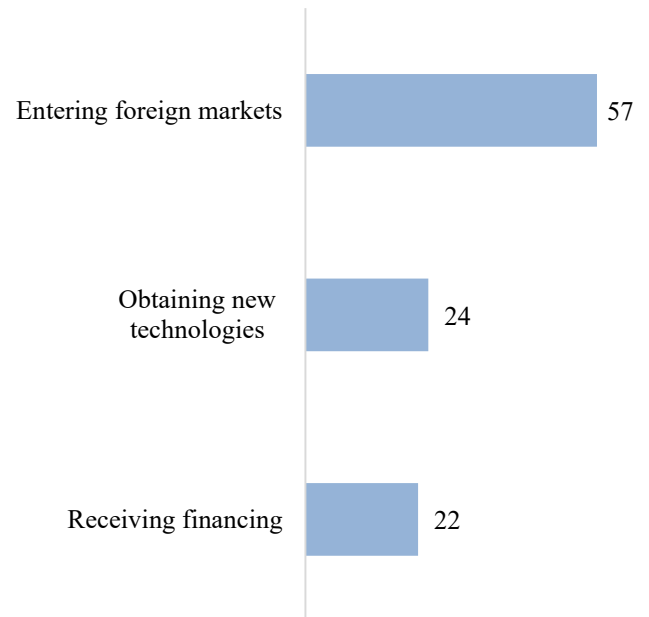


Fig. 1.15. Main areas of potential cooperation with the Dutch business in sectors under investigation, %

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 91% of the surveyed companies show interest in cooperation with the Dutch companies, first of all in entering foreign markets (57%), obtaining new technologies (24%), and receiving financing (22%).

2. Agro-food and Horticulture. Detailed sectoral analysis

2.1. Agro-food sectors analysis

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 1 756 enterprises in agro-food sectors, 1 126 of which are legal entities (64%), and 630 - individual entrepreneurs (36%). The largest number of companies operates in Vinnytsia region (446 units or 25%), and the least - in Kirovohrad region (93 units or 5%).

The sectors are employing 52 416 full-time employees, including 50 897 in legal entities (97%), and 1 519 are employed by individual entrepreneurs (about 3%). The sector's leader by the number of employees is Vinnytsia region (14 511 people or 28%), while the smallest employment in the sector is in Kirovohrad region (1 874 people or 4%).

Table 2.1. Number of functioning enterprises and employment in agro-food sectors in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	144	76	220	9 146	194	9 340
Chernihiv	140	63	203	5 328	94	5 422
Khmelnyskiy	145	79	224	5 561	333	5 894
Kirovohrad	57	36	93	1 814	60	1 874
Kyiv	237	145	382	8 863	299	9 162
Vinnytsia	258	188	446	14 066	445	14 511
Zhytomyr	145	43	188	6 119	94	6 213
Total	1 126	630	1 756	50 897	1 519	52 416

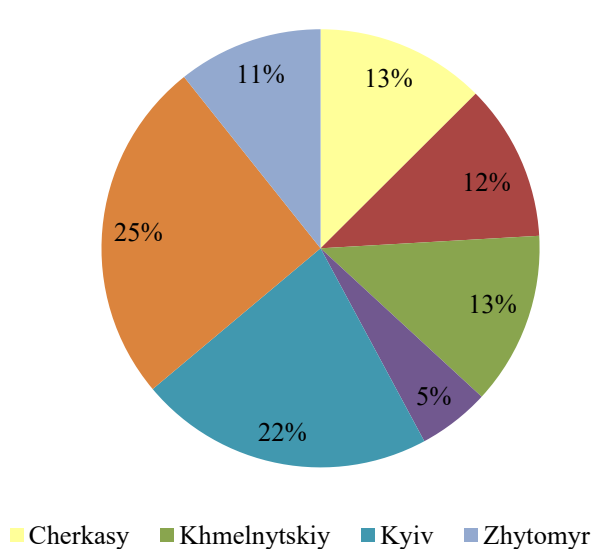


Fig. 2.1. Breakdown of agro-food sectors enterprises by regions

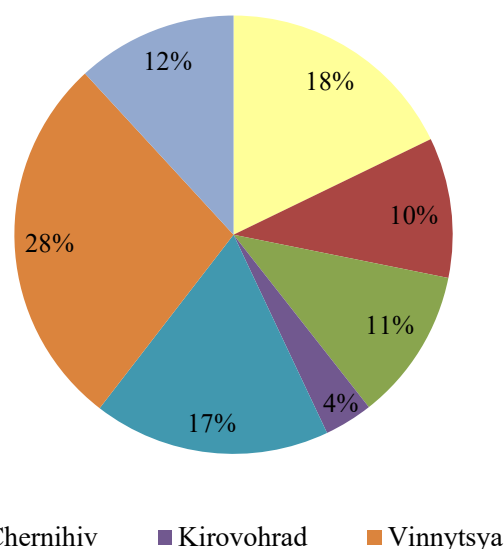


Fig. 2.2. Regional employment structure in agro-food sectors

Sales

In 2018, sales volume of agro-food sectors enterprises amounted to about UAH 49 042 million, of which UAH 48 681 million were generated by legal entities (almost 99%), and the rest UAH 361 million – by individual entrepreneurs (about 1%).

In the regional structure, the leaders are Vinnytsia region (UAH 13 661 million or 28% of sales), Kyiv region (UAH 9 543 million or 19%) and Cherkasy region (UAH 8 802 million or 18%). Together, these regions account for more than 65% of agro-food sectors sales among the 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in agro-food sectors is about 36%.

Table 2.2. The volume of sales of agro-food sectors enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	8 773	29	8 802
Chernihiv	4 984	34	5 018
Khmelnyskiy	3 920	80	4 000
Kirovohrad	1 809	14	1 824
Kyiv	9 448	95	9 543
Vinnytsia	13 568	93	13 661
Zhytomyr	6 177	16	6 193
Total	48 681	361	49 042

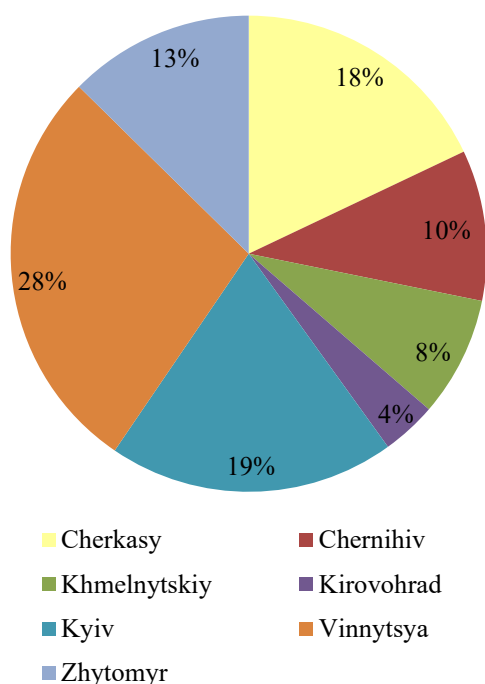


Fig. 2.3. Regional sales of agro-food sectors products

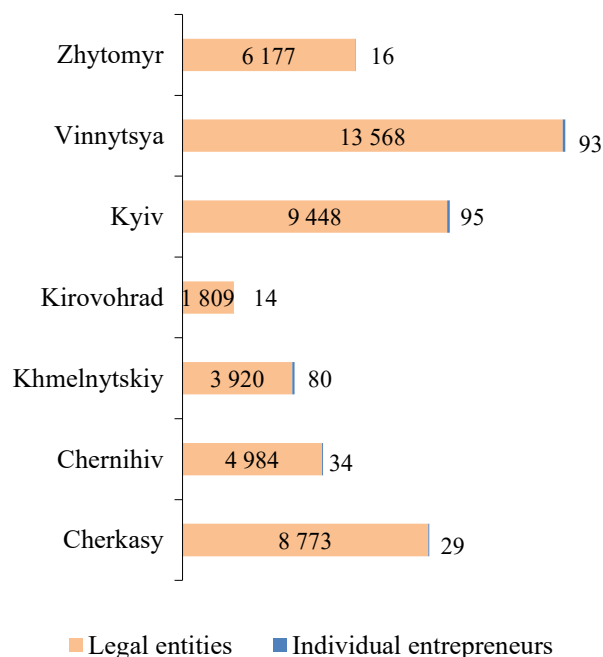


Fig. 2.4. Regional sales of agro-food sectors products by type of business entity, mln. UAH

Dairy products dominate in the commodity structure of sales (56% of total sales of the sector). Vinnytsia region is a leader in production in 3 out of 8 sectors under study, namely dairy products, fruit and berries and processing of fruits and vegetables

Table 2.3. Sales of agro-food sectors in 2018 by subsectors, mln. UAH

Sector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Manufacture of dairy products	3 745	2 449	1 867	865	4 728	8 859	4 942	27 454
Processing and preserving of fruit and vegetables	1 377	280	77	256	1 520	2 147	11	5 669
Production of fruits and berries	56	14	160	7	56	681	130	1 104
Production of vegetables and mushrooms	1 105	275	500	68	1 222	541	221	3 931
Production of milk	2 519	1 999	1 396	627	2 017	1 434	890	10 883
Total	8 802	5 018	4 000	1 824	9 543	13 661	6 193	49 042

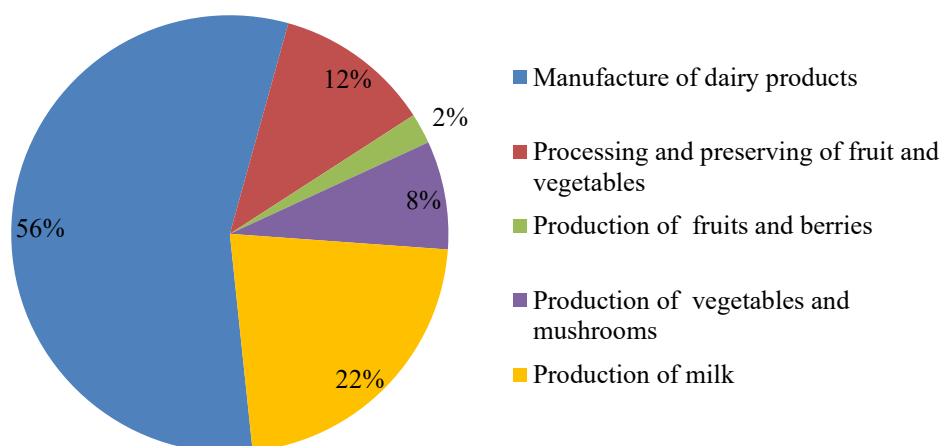


Fig. 2.5. Agro-food sectors sales by products

Export

In 2018, the volume of agro-food sectors exports in 7 Central Ukrainian regions under investigation amounted to about USD 250.5 million, of which almost 44% was generated by Vinnytsia region (USD 109 million).

Main export sales markets are Poland, Austria, Belarus and Moldova (28% of total exports).

Table 2.4. The volume of export of agro-food sectors in 2018, thousand USD

Sector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Butter	1 349	5 841	6 519		9 274	27 248	6 369	56 599
Milk and cream, concentrated or containing added sugar	985	9 148	3 678		114	18 402	5 259	37 585
Frozen fruit and nuts	1 184	500	11 614		0	6 948	3 530	23 776
Dried leguminous vegetables	3 160	6 947	4 367	875	2 387	3 132	2 581	23 450
Fruit juices	1 174	15			180	18 229		19 597
Other nuts, fresh or dried	4 933		2 878	9	0	21	3 649	11 490
Fruits, nuts and other edible parts of plants, prepared or preserved,	5	0		338	383	9 819	82	10 627
Milk and cream, not concentrated nor containing added sugar	0				21	8 807	2	8 830
Fresh leguminous vegetables	488	291	724	338	3 750	3 146		8 738
Whey	3 295		129		0	4 136		7 560
Cheese and curd	1 457	879	1 792		228	2 789	26	7 171
Apples, pears and quinces, fresh	12	126	117	121	286	3 958	11	4 630
Tomatoes, fresh or chilled	2 251	1 161			1 204	4		4 622
Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen	2 461	58		0	1 780			4 299
Vegetables, uncooked or cooked by steaming or boiling in water, frozen	3 125	117	45	272		20	366	3 944
Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved	2 143	3			1 500	6		3 653
Potatoes, fresh or chilled	3	1 608			639	103	433	2 787
Cucumbers and gherkins, fresh or chilled	1 889	65			729			2 683
Other vegetables, fresh or chilled	805	175	2		13	311	391	1 697
Buttermilk, curdled milk and cream, yogurt, kephir and other fermented or acidified milk and cream,	0		763		21	690	33	1 506
Jams, fruit jellies, marmalades	167	8			203	726		1 104
Fresh strawberries, raspberries, blackberries, black, white or red currants, gooseberries and other edible fruits					65	346	491	902
Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid	3			24	495			523
Other	254	1 041	345	14	203	649	201	2 707
Total	31 142	27 984	32 973	1 992	23 476	109 490	23 423	250 481

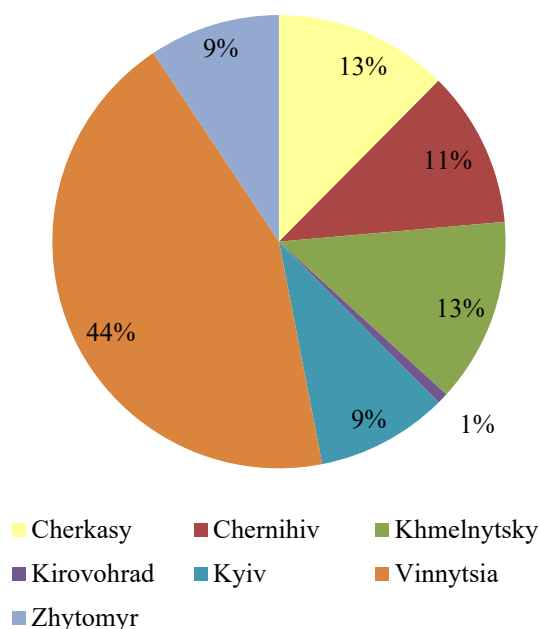


Fig. 2.6. Regional breakdown of agro-food sectors export

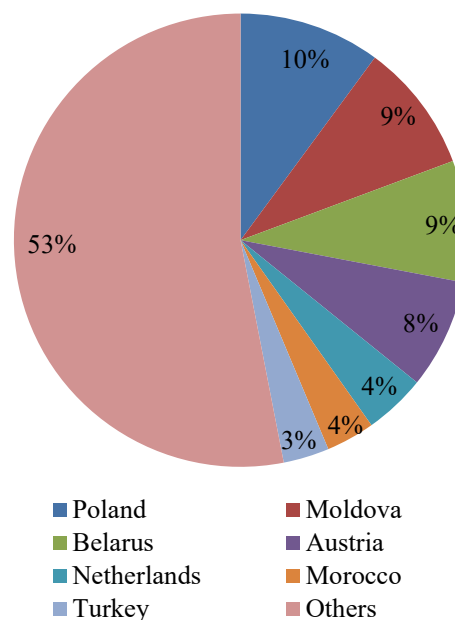


Fig. 2.7. Agro-food sectors export by destinations

Leading companies of the sector

The main production of agro-food sectors in 7 Central Ukrainian regions under investigation are dairy products manufacturers – Food Development LLC, “Yagotinsky creamery” ALC and “Lustdorf Company LLC.

Table 2.5. Leading production of agro-food sectors companies

ID code	Company name (English)	Company name (Ukrainian)	Sector
40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	Manufacture of dairy products
446003	“Yagotinsky Butter Plant” ALC	ТДВ “Яготинський маслозавод”	Manufacture of dairy products
23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	Manufacture of dairy products
182863	PJSC “Zhytomyr Butter Plant”	ПАТ “Житомирський маслозавод”	Manufacture of dairy products
418018	PJSC “Vinnytsia dairy plant” Roshen “	ПрАТ “Вінницький молочний завод “Рошен”	Manufacture of dairy products
447853	JSC “Yuriya”	ПрАТ “Юрія”	Manufacture of dairy products
31952591	Subsidiary enterprise “Starokostiantyniv Dairy Plant”	Дочірнє підприємство “Старокостянтинівський молочний завод”	Manufacture of dairy products
447824	“Zolotonosha butter factory” ALC	ТДВ “Золотоніський маслоробний комбінат”	Manufacture of dairy products
20118399	“Agrana Fruit Ukraine” LLC	ТОВ “Агрона Фрут Україна”	Processing and preserving of fruit and vegetables
30873067	LLC “Andrushivsky Creamery”	ТОВ “Андрушівський маслосирзавод”	Manufacture of dairy products

Regional distribution of the largest companies in the sector is shown in Table 2.6.

Table 2.6. Top-10 companies of agro-food sectors by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector
Vinnytsia	40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	Manufacture of dairy products
	23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	Manufacture of dairy products
	418018	PJSC “Vinnytsia dairy plant” Roshen “	ПрАТ “Вінницький молочний завод “Рошен”	Manufacture of dairy products
	20118399	“Agrana Fruit Ukraine” LLC	ТОВ “Агрона Фрут Україна”	Processing and preserving of fruit and vegetables
	41104967	Podillya Agroproduct LLC	ТОВ “Поділля Агропродукт”	Production of milk
	424444	“Litinsky dairy plant” LLC	ТОВ “Літинський молочний завод”	Manufacture of dairy products
	38030199	“Khmelnyskyi factory of powdered skim milk” Milk Visit LLC	ТОВ “Хмельницький Завод Сухого Знежиреного Молока “Молочний Візит”	Manufacture of dairy products
	32320552	Eco-Sphere LLC	ТОВ “Еко-Сфера”	Processing and preserving of fruit and vegetables
	30425482	Pfanner Bar LLC	ТОВ “Пфаннер Бар”	Processing and preserving of fruit and vegetables
	37695570	Austria Juice Ukraine LLC	ТОВ “Австрія Джус Україна”	Processing and preserving of fruit and vegetables
Kyiv	446003	“Yagotinsky Butter Plant” ALC	ТДВ “Яготинський маслозавод”	Manufacture of dairy products
	36832644	Lux Chips LLC	ТОВ “Чіпси Люкс”	Processing and preserving of fruit and vegetables
	34099131	“Ukrainian Dairy Company” LLC	ТОВ “Українська Молочна Компанія”	Production of milk
	445937	PJSC Wimm-Bill-Dann Ukraine	ПрАТ “Вімм-Білл-Данн Україна”	Manufacture of dairy products
	5528361	PJSC “Greenhouse” Combine	ПрАТ “комбінат “Тепличний”	Production of vegetables and mushrooms
	445914	Obukhov Dairy Factory JSC	ПрАТ “Обухівський молочний завод”	Manufacture of dairy products
	31320656	Agrosvit Agricultural LLC	Сільськогосподарське ТОВ “Агросвіт”	Production of milk
	445794	JSC “ZHLK-Ukraine”	ПрАТ “ЖЛК-Україна”	Manufacture of dairy products
	445920	“Pereyaslav-Molproduct” LLC	ТОВ “Переяслав-Молпродукт”	Manufacture of dairy products
	38981517	Milk Line Dairy Company LLC	ТОВ “Молочна Компанія “Мілк Лайн”	Manufacture of dairy products
Khmelnysky	31952591	Subsidiary enterprise “Starokostiantyniv Dairy Plant”	Дочірнє підприємство “Старокостянтинівський молочний завод”	Manufacture of dairy products
	447729	Khmelnyskyi Maslosyrbaza PJSC	ПрАТ “Хмельницька Маслосирбаза”	Manufacture of dairy products
	37971230	Jivaldis Private Enterprise	Приватне підприємство “Дживальдіс”	Manufacture of dairy products
	39757078	SK Promin LLC	ТОВ “СК Промінь”	Production of milk
	14146210	PJSC “Derazhnyansky Dairy Factory”	ПрАТ “Деражнянський молочний завод”	Manufacture of dairy products
	32678236	Podilsky Hospodar LLC	ТОВ “Подільський Господар”	Production of milk
	447681	“Vinkovetsky Cheese Factory” LLC	ТОВ “Вінківський Сирзавод”	Manufacture of dairy products
	36334993	Private enterprise “Izyaslavmolproduct”	Приватне підприємство “Ізяславмолпродукт”	Manufacture of dairy products

	3788454	“Sviatets” LLC	ТОВ “Святець”	Production of milk
	3789198	Labunsky Agricultural Production Cooperative	Сільськогосподарський Виробничий Кооператив “Лабунський”	Production of milk
Cherkasy	447853	JSC “Yuriya”	ПрАТ “Юрія”	Manufacture of dairy products
	447824	“Zolotonosha butter factory” ALC	ТДВ “Золотоніський маслоробний комбінат”	Manufacture of dairy products
	447818	PJSC “Zvenygorodka Cheese Making Plant”	ПрАТ “Звенигородський сироробний комбінат”	Manufacture of dairy products
	31561125	Kischenzi LLC	ТОВ “Кищенці”	Production of milk
	2779234	Private-leasing agricultural enterprise “Uman greenhouse complex”	Приватно-орендне сільськогосподарське підприємство “Уманський тепличний комбінат”	Production of vegetables and mushrooms
	31561188	Agricultural LLC “Agroko”	Сільськогосподарське ТОВ “Агроко”	Production of milk
	3793159	Agricultural “Agro firm “Mayak” LLC	Сільськогосподарське ТОВ “Агрофірма “Маяк”	Production of milk
	3793107	Pleshkani Private Agricultural Enterprise	Приватне сільськогосподарське підприємство “Плешкані”	Production of milk
	34571712	Subsidiary company “Uman-Agro”	Дочірнє підприємство “Умань-Агро”	Production of milk
	30284277	Imperial Plus Private Enterprise	Приватне підприємство “Імперіал Плюс”	Manufacture of dairy products
Zhytomyr	182863	PJSC “Zhytomyr Butter Plant”	ПАТ “Житомирський маслозавод”	Manufacture of dairy products
	30873067	“Andrushivsky Creamery” LLC	ТОВ “Андрушівський маслосирзавод”	Manufacture of dairy products
	35694381	“Rihalsk factory of milk powder” LLC	ТОВ “Рихальський завод сухого молока”	Manufacture of dairy products
	32282161	Renet Private Enterprise	Приватне підприємство “Ренет”	Manufacture of dairy products
	37107815	“Galiyevsky Maslozavod” LLC	ТОВ “Галіївський Маслозавод”	Manufacture of dairy products
	13560947	Impak Private Enterprise	Приватне підприємство “Імпак”	Production of vegetables and mushrooms
	38107182	Organic Milk LLC	ТОВ “Органік Мілк”	Manufacture of dairy products
	31318317	Baranovsky Dairy LLC	ТОВ “Баранівський молокозавод”	Manufacture of dairy products
	13553775	Galex-Agro Private Enterprise	Приватне підприємство “Галекс-Агро”	Production of milk
	3745025	Private agro firm “Yerchyky”	Приватна Агрофірма “Єрчики”	Production of milk
Kirovohrad	39503720	Non-Governmental Organization of Domestic Producer Support Association “Firm Laska”	Підприємство об’єднання громадян “Фірма Ласка” ГО “Асоціація підтримки вітчизняного товаровиробника”	Manufacture of dairy products
	40236151	“Svitlovodsk Butter and Cheese Factory” LLC	ТОВ “Світловодський Маслосирзавод”	Manufacture of dairy products
	32119941	Private enterprise “Pancevo Agro Firm”	Приватне підприємство “Агрофірма “Панчеве”	Production of vegetables and mushrooms
	5526770	Progress LLC	ТОВ “Прогрес”	Production of milk
	24744314	“OLTO” LLC	ТОВ Фірма “ОЛТО”	Production of milk
	31826903	“Dolynivka” LLC	ТОВ “Долинівка”	Production of milk
	3756810	Frunze Agricultural LLC	Сільськогосподарське ТОВ Імені Фрунзе	Production of milk
	5527195	Private agricultural	ПСП “Нива”	Production of milk

		enterprise “Niva”		
	38884406	“Yasynivsky Hutir” LLC	ТОВ “Ясинівський Хутір”	Production of milk
	34141350	Jivan-Darwin Farm	Фермерське господарство “Дживан-Дарвін”	Production of milk
Chernihiv	381152	JSC “Ichnia Milk Canning Factory”	ПрАТ “Ічнянський молочно-консервний комбінат”	Manufacture of dairy products
	448077	PJSC “Novgorod-Siversky cheese factory”	ПрАТ “Новгород-Сіверський сирзавод”	Manufacture of dairy products
	41212435	“Ichnia Dry Milk and Butter Factory” LLC	ТОВ “Ічнянський завод сухого молока та масла”	Manufacture of dairy products
	5388983	JSC “Kulykivske milk”	ПрАТ “Куликівське молоко”	Manufacture of dairy products
	34593914	Niva 2008 LLC	ТОВ “Нива 2008”	Production of milk
	24842666	Agricultural Company “Nadiya”	Сільськогосподарське ТОВ “Надія”	Production of milk
	2078868	“Rozhnivka-Agro” LLC	ТОВ “Рожнівка-Агро”	Production of milk
	21403660	“Losynivsky butter and cheese factory” LLC	ТОВ “Лосинівський маслосирзавод”	Manufacture of dairy products
	3794785	Private agricultural enterprise “Piskivske”	Приватне сільськогосподарське підприємство “Пісківське”	Production of milk
	30481568	Mena-Avangard LLC	ТОВ “Мена-Авангард”	Production of milk

Key obstacles observed in the sector

While identifying main obstacles for the development of agro-food sectors production in 7 Central Ukrainian regions under investigation 172 companies were contacted, of which 143 (83%) agreed to participate in the survey, and 29 (17%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

Fig. 2.8. The rating of main obstacles for the development of agro-food sectors production industry in 7 Central Ukrainian regions under investigation, %

The interviewed companies of agro-food sectors stressed the following key obstacles to growth: lack of government support (47%), inaccessibility of funding (47%) and shortage of workers (29%).

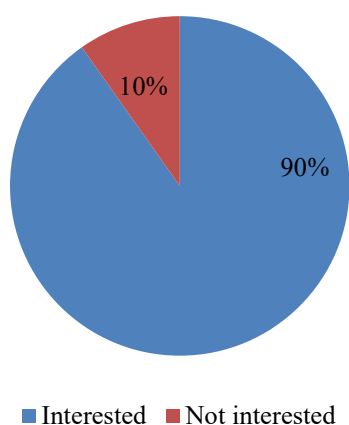


Fig. 2.9. The interest of agro-food sectors enterprises

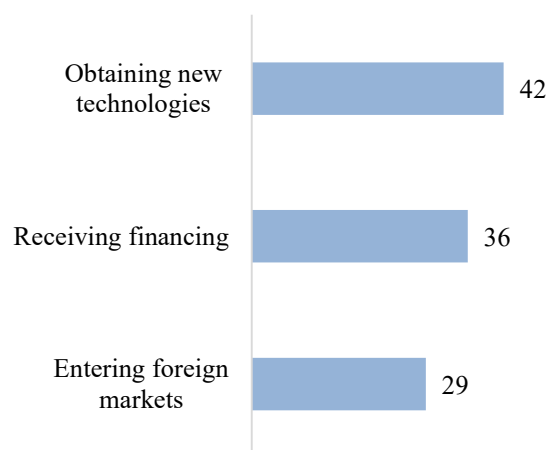


Fig. 2.10. Main areas of potential cooperation with

in cooperation with the Dutch business

the Dutch business in agro-food sectors, %

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 90% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (42%), receiving financing (36%) and entering foreign markets (29%).

2.2. Production of fruits and berries

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 529 enterprises producing fruits and berries, 361 of which are legal entities (68%), and 168 - individual entrepreneurs (32%). The largest number of companies operates in Vinnytsia region (233 units or 51%), and the least - in Chernihiv region (17 units or 3%).

The sector is employing 5 059 full-time employees, including 4 804 in legal entities (95%), and 255 are employed by individual entrepreneurs (about 5%). The sector's leader by the number of employees is Vinnytsia region (3 846 people or 76%), while the smallest employment in the sector is in Chernihiv region (34 people or 1%).

Table 2.7. Number of functioning enterprises and employment in production of fruits and berries in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	45	22	67	233	27	260
Chernihiv	10	7	17	24	10	34
Khmelnyskiy	72	27	99	378	46	424
Kirovohrad	15	8	23	71	13	84
Kyiv	40	16	56	235	31	266
Vinnytsia	154	79	233	3 728	118	3 846
Zhytomyr	25	9	34	135	10	145
Total	361	168	529	4 804	255	5 059

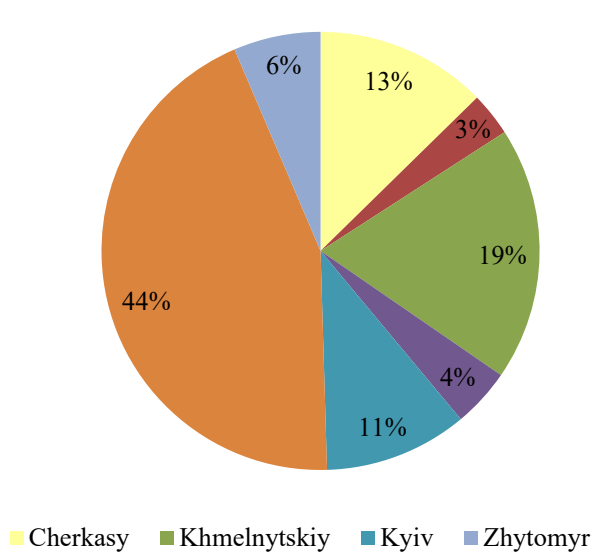


Fig. 2.11. Breakdown of production of fruits and berries enterprises by regions

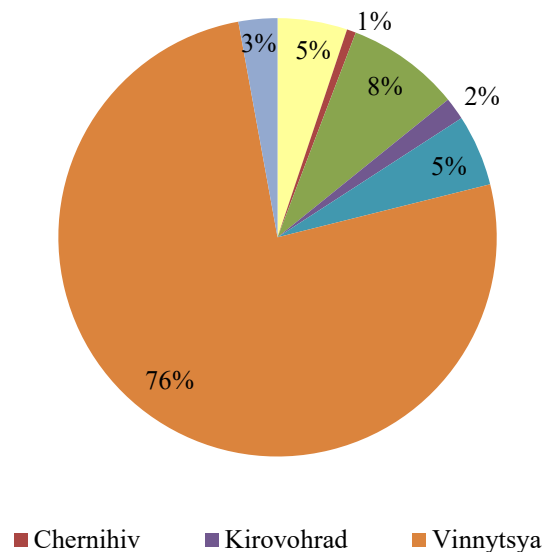


Fig. 2.12. Regional employment structure in production of fruits and berries

Sales

In 2018, sales volume of fruits and berries enterprises amounted to about UAH 1 104 million, of which UAH 1 050 million were generated by legal entities (almost 95%), and the rest UAH 54 million – by individual entrepreneurs (about 5%).

In the regional structure, the leaders are Vinnytsia region (UAH 681 million or 62% of sales) and Khmelnytskyi region (UAH 160 million or 14%). Together, these regions account for more than 76% of fruits and berries sales among the 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in fruits and berries production is about 36%.

Table 2.8. The volume of sales of production of fruits and berries enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	50.0	5.5	55.5
Chernihiv	13.3	1.0	14.4
Khmelnytskyi	149.6	10.5	160.1
Kirovohrad	6.1	0.9	7.0
Kyiv	51.8	4.1	55.9
Vinnytsia	653.0	28.3	681.3
Zhytomyr	126.4	3.4	129.8
Total	1 050.2	53.8	1 104.0

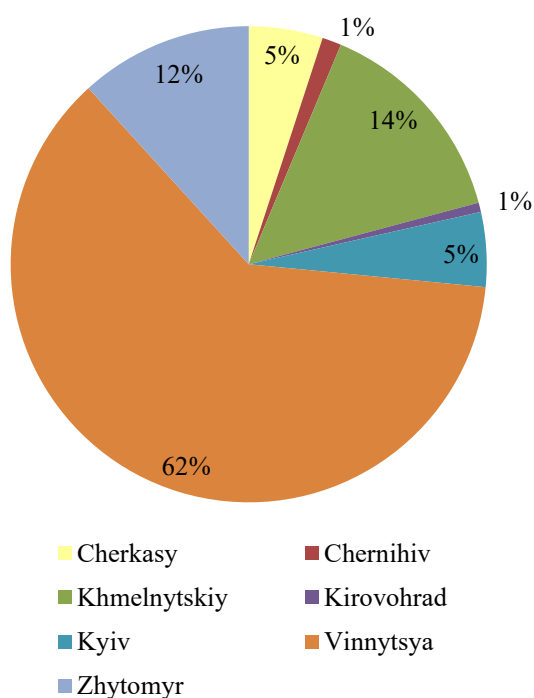


Fig. 2.13. Regional sales of fruits and berries products

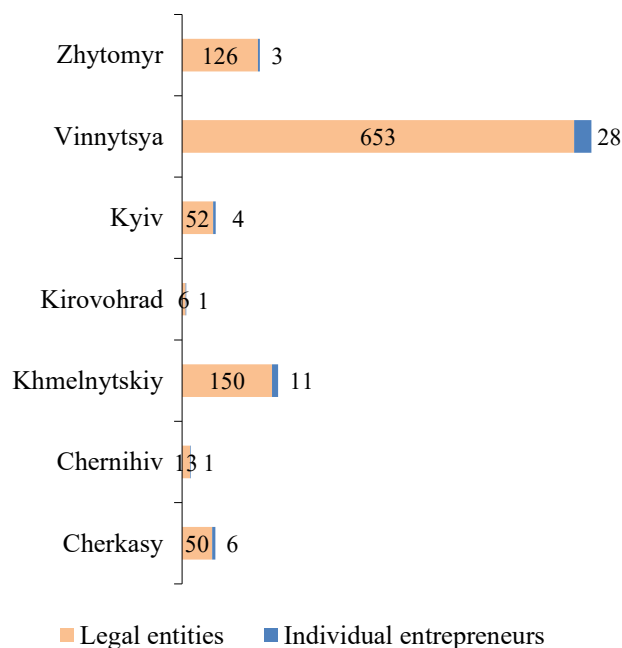


Fig. 2.14. Regional sales of fruits and berries products by type of business entity, mln. UAH

Pome fruits and stone fruits sales dominate in the commodity structure of sales (67% of total sales of the sector). Vinnytsia region is a leader in the pome fruits and stone fruits production (73% of total sales) and other tree and bush fruits and nuts production (39%).

Table 2.9. Sales of production of fruits and berries in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Growing of pome fruits and stone fruits	27.3	0.7	135.6	6.1	28.0	542.3	3.2	743.1
Growing of other tree and bush fruits and nuts	28.2	13.7	24.6	0.9	27.9	138.9	126.6	360.8
Total	55.5	14.4	160.1	7.0	55.9	681.3	129.8	1 104.0

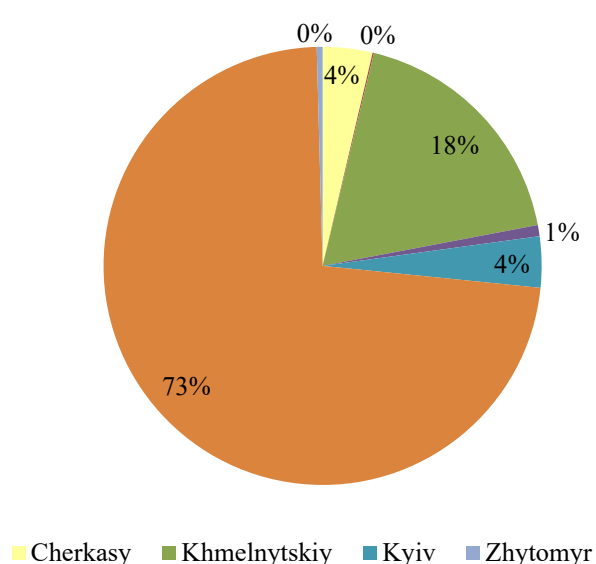


Fig. 2.15. Regional sales of pome fruits and stone fruits

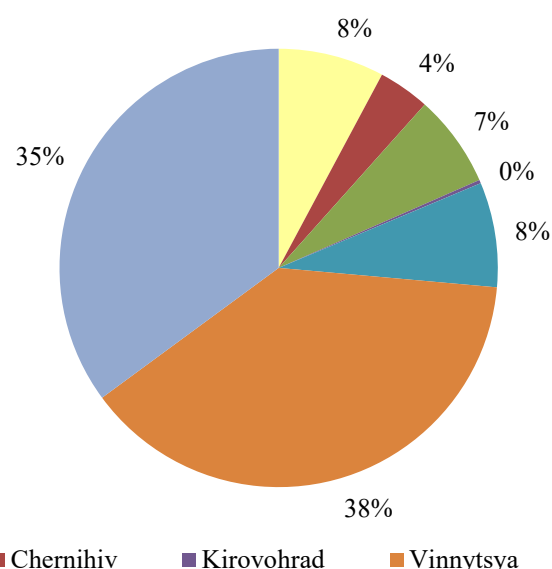


Fig. 2.16. Regional sales of bush fruits and nuts

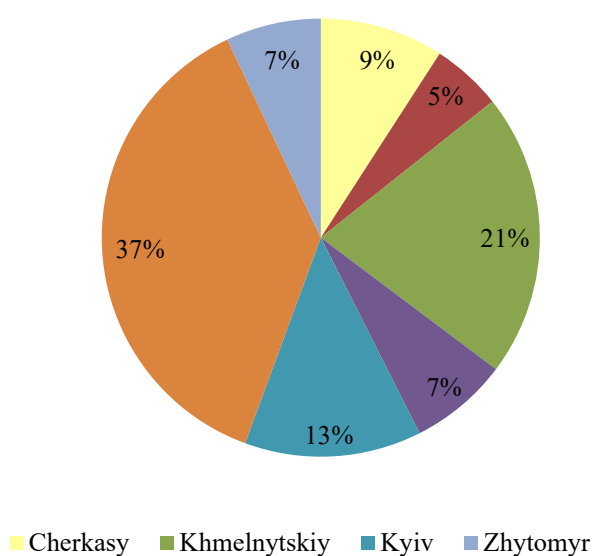
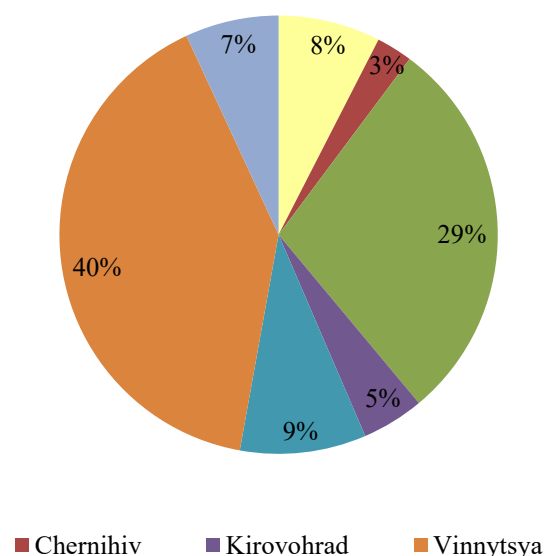
Production

The volume of fruits and berries production in 7 Central Ukrainian regions under investigation in 2017 amounted to 825 thousand tons (about 32% of the total production in Ukraine), of which 583 were grown by households (71%), and 242 - agricultural enterprises (29%).

In a regional structure, the leader is Vinnytsia region (332,3 thousand tons or 40% of total production).

Table 2.10. The volume of fruits and berries production in 2018

Region	Total area of the plantations, thsd.ha			Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total	Agricultural enterprises	Households	Total
Cherkasy	2.6	3.9	6.5	13.0	49.3	62.2
Chernihiv	0.8	2.9	3.7	2.8	19.2	22.0
Khmelnyskiy	3.7	11.2	14.9	33.8	203.3	237.2
Kirovohrad	1.9	3.3	5.2	2.1	35.8	37.9
Kyiv	2.0	7.3	9.3	12.0	64.8	76.8
Vinnytsia	14.6	12.0	26.6	174.9	157.5	332.3
Zhytomyr	2.7	2.3	5.0	3.5	53.5	57.0
Total	28.3	42.9	71.2	242.0	583.3	825.3
Total production in Ukraine	68.9	159.0	227.9	556.6	2014.7	2571.3
Share of 7 regions in Ukraine production	41%	27%	31%	43%	29%	32%

**Fig. 2.17. Regional breakdown of fruits and berries plantations area****Fig. 2.18. Regional breakdown of fruits and berries production**

It should be noted that an overwhelming majority of fruits and berries grown by households are subsequently consumed for their own needs and not delivered into the market. As a result, marketable products are mostly fruits grown by agricultural enterprises.

Vinnytsia region dominates in fruits and berries production by agricultural enterprises (52% of plantations area and 72% of production).

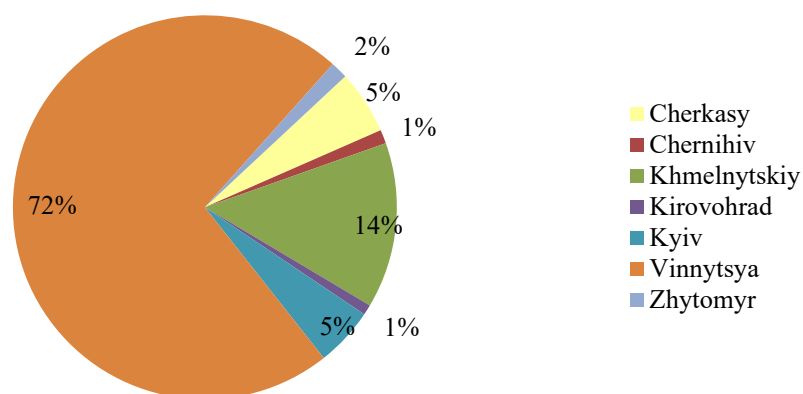


Fig. 2.19. Regional breakdown of fruits and berries production by agricultural enterprises

Export

In 2018, the volume of fruits and berries exports in 7 Central Ukrainian regions under investigation amounted to about USD 6.3 million, of which almost 69% was generated by Vinnytsia region (USD 4.3 million).

Main foreign sales markets are Belarus (42%), Austria (16%) and Sweden (11%).

Table 2.11. The volume of export of fruits and berries in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Apples, pears and quinces, fresh	12	126	117	121	286	3 958	11	4 630
Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries and other edible fruits					65	346	491	902
Fresh melons		410	27	1	5			443
Fresh apricots, cherries, peaches		111	137		63	21		333
Grapes, fresh or dried		0			1			2
Total	12	648	281	122	421	4 326	502	6 310

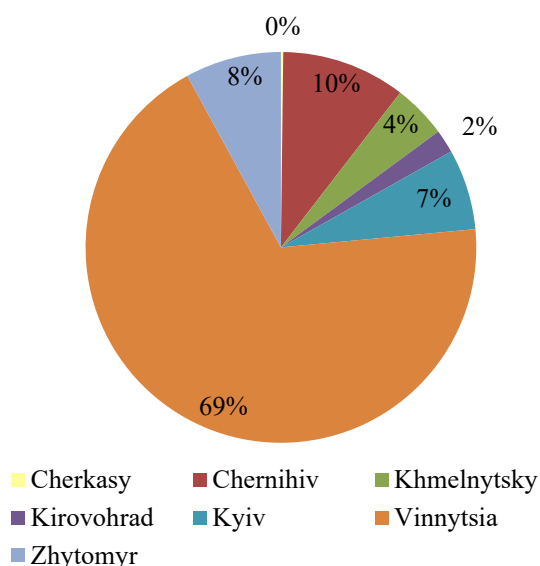


Fig. 2.20. Regional breakdown of fruits and berries export

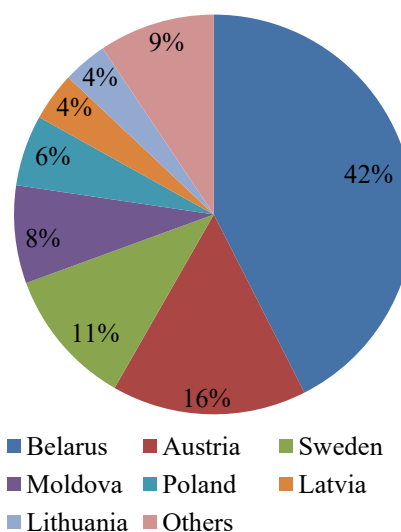


Fig. 2.21. Fruits and berries export by destinations

Leading companies of the sector

The main production of fruits and berries in 7 Central Ukrainian regions under investigation are Agro-Etalon LLC, Agrana Fruit Luka LLC and Atlantic Brands Ukraine LLC.

Table 2.12. Leading production of fruits and berries companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
34020957	Agro-Etalon LLC	ТОВ “Агро-Еталон”	more than 100
31315211	“Agrana Fruit Luka” LLC	ТОВ “Агрона Фрут Лука”	more than 100
36925670	Betec LLC	ТОВ “Бетек”	more than 100
41741748	Atlantic Brands Ukraine LLC	ТОВ “Атлантик Брендз Україна”	50-100
34918457	Komarivtsi LLC	ТОВ “Комарівці”	50-100
412470	“Gorodotske” ALC	ТДВ “Городоцьке”	50-100
414262	PJSC “Druzhba-VM”	ПАТ “Дружба-ВМ”	50-100
414210	Zornyshche PJSC	ПАТ “Жорнище”	50-100
33354865	Private enterprise “Dary Sadiv”	Приватне підприємство “Дари Садів”	25-50
32701558	Decoplant LLC	ТОВ “Декоплант”	25-50

Regional distribution of the largest companies in the sector is shown in Table 2.13.

Table 2.13. Top-10 companies of fruits and berries production by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	34020957	Agro-Etalon LLC	ТОВ “Агро-Еталон”	more than 100
	31315211	“Agrana Fruit Luka” LLC	ТОВ “Агрона Фрут Лука”	more than 100
	34918457	Komarivtsi LLC	ТОВ “Комарівці”	50-100
	414262	PJSC “Druzhba-VM”	ПАТ “Дружба-ВМ”	50-100
	414210	Zornishche PJSC	ПАТ “Жорнище”	50-100
	33354865	Private enterprise “Dary Sadiv”	Приватне підприємство “Дари Садів”	25-50
	32701558	Decoplant LLC	ТОВ “Декоплант”	25-50
	414368	“Fedorovske.” LLC	ТОВ “Федорівське.”	25-50
	34122034	Granvis LLC	ТОВ “Гренвіс”	25-50
	37898355	Triada-Mk LLC	ТОВ “Тріада-Мк”	less than 25
Kyiv	41741748	Atlantic Brands Ukraine LLC	ТОВ “Атлантик Брендз Україна”	50-100
	37616132	“Artel №1” LLC	ТОВ “Артель №1”	less than 25
	38851496	“Gardens of Kyiv region” LLC	ТОВ “Сади Київщини”	less than 25
	4308278	State Enterprise “Dmytrivka Research Institute” of the Institute of Horticulture of the National Academy of Agrarian Sciences of Ukraine”	Державне Підприємство “Дослідне Господарство “Дмитрівка” Інституту Садівництва Національної Академії Аграрних Наук України”	less than 25
	36449850	“DP” Novosilky Investigative Farm LLC	ТОВ “ДП “Дослідне Господарство “Новосілки”	less than 25
	32034465	Rancho Agro Firm LLC	ТОВ “Агрофірма “Ранчо”	less than 25
	412263	PJSC “Novoaleksandrivske”	ПРАТ “Новоолександрівське”	less than 25
	39392529	“VLT Flora” LLC	ТОВ “ВЛТ Флора”	less than 25
	37341425	“Agro Vesna-2011 “LLC	ТОВ “Агрофірма “Весна-2011”	less than 25
	40986671	Family Garden LLC	ТОВ “Фемілі Гарден”	less than 25
Khmelnyskiy	412470	“Gorodotske” ALC	ТДВ “Городоцьке”	50-100
	36269102	Farming Enterprise “Sam+”	Фермерське господарство	less than 25

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			“Сам+”	
	31424783	Farming Enterprise “Astra-1”	Селянське Фермерське Господарство “Айстра-1”	less than 25
	33617059	Agro-Invest-Group LLC	ТОВ “Агро-Інвест-Груп”	less than 25
	34816196	“Vodogray-Plus” LLC	ТОВ “Водограй-Плюс”	less than 25
	33522533	Farming Enterprise “Velyke Pole-SV”	Фермерське господарство “Велике Поле-СВ”	less than 25
	30066610	Subsidiary Enterprise “Gloria”	Дочірнє Підприємство “Глорія”	less than 25
	22782003	Private Agricultural Enterprise “Farna”	Сільськогосподарське приватне підприємство “Фарна “	less than 25
	34669752	Farming Enterprise “Sad II”	Фермерське господарство “Сад ІІ.”	less than 25
Cherkasy	41984869	“Yarmolyntsi Canning Factory” LLC	ТОВ “Ярмолинецький консервний завод”	less than 25
	38682850	Soft Torg LLC	ТОВ “Софт Торг”	less than 25
	34704477	“Adana-3” LLC	ТОВ “Адана-3”	less than 25
	34223637	“Zolotonosha Gardens” LLC	ТОВ “Золотоніські Сади”	less than 25
	36773558	Farming Enterprise “Filchenkov”	Фермерське господарство “Фільченков”	less than 25
	41508927	Yummy Fruts LLC	ТОВ “Юммі Фруте”	less than 25
	31999093	Farming Enterprise “Stepok”	Фермерське господарство “Степок”	less than 25
	39600810	Farming Enterprise “Gardens of Horodyschyna”	Фермерське господарство “Сади Городищини”	less than 25
	35659609	Antonovka IK LLC	ТОВ “Антоновка І К”	less than 25
	40018736	Vital Garden LLC	ТОВ “Вітал Гарден”	less than 25
Zhytomyr	33931105	Private Enterprise “Pecont”	Приватне Підприємство “Пеконт”	less than 25
	36925670	Betec LLC	ТОВ “Бетек”	more than 100
	38284211	“Ukrainian Berry” LLC	ТОВ “Українська Ягода”	less than 25
	34719792	“Ukrtransservice Group” LLC	ТОВ “Укртранссервісгруп”	less than 25
	42040721	Fresh Apple Group LLC	ТОВ “Фреш Еплл Груп”	less than 25
	40209856	Polissia-Agros Farm	Фермерське господарство “Полісся-Агрос”	less than 25
	31603552	Farming enterprise “Nadiya”	Фермерське господарство “Надія”	less than 25
	41161517	Farming enterprise “Dacha”	Фермерське господарство “Дача”	less than 25
	38349540	Farming enterprise “Alex-Agro”	Фермерське господарство “Алекс-Агро”	less than 25
	39960409	Farming enterprise “Yagodynka”	Фермерське господарство “Ягодинка”	less than 25
	39632397	“Nebizh Agro” LLC	ТОВ “Небіж Агро”	less than 25
Kirovohrad	31204035	Phoenix-2000 LLC	ТОВ “Фенікс-2000”	less than 25
	38761853	Farming enterprise “My Family”	Фермерське господарство “Моя Родина”	less than 25
	31771687	Farming enterprise “Vesna”	Фермерське господарство “Весна”	less than 25
	31046548	Evita Private Enterprise	Приватне підприємство “Евіта”	less than 25
	32777344	Farming enterprise “Medovyy Sad”	Фермерське господарство “Медовий Сад”	less than 25
	34869913	Petrovsky Posad LLC	ТОВ “Петрівський Посад”	less than 25
	39787296	Farming enterprise “Gayivka Agro”	Фермерське господарство “Гаївка Агро”	less than 25
	31046532	Pilot Private Enterprise	Приватне підприємство “Пілот”	less than 25
Chernihiv	40748611	Farming enterprise “Nizhyn	Фермерське господарство	less than 25

		Agroinvest”	“Ніжин Агроінвест”	
	32785910	Farming enterprise “Golden Parmen”	Фермерське Садівниче Господарство “Золотий Пармен”	less than 25
	34209963	Farming enterprise “Pinova”	Фермерське господарство “Пінова “	less than 25
	31942780	Farming enterprise “Garden of Larchenko”	Фермерське господарство “Сад Ларченка”	less than 25

Key obstacles observed in the sector

While identifying main obstacles for the development of fruits and berries production in 7 Central Ukrainian regions under investigation 60 companies were contacted, of which 56 (93%) agreed to participate in the survey, and 4 (7%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

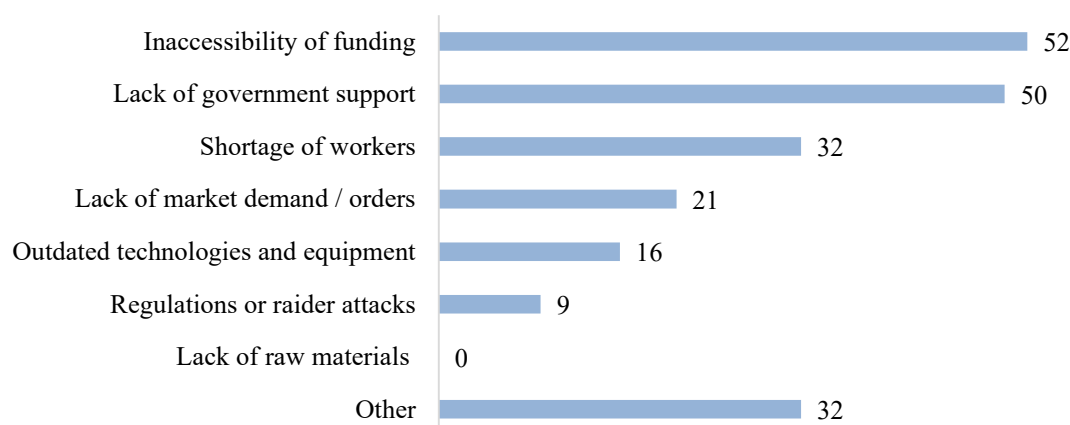


Fig. 2.22. The rating of main obstacles for the development of fruits and berries industry in 7 Central Ukrainian regions under investigation, %

The Ukrainian fruits and berries production sector faces some important challenges. The interviewed companies stressed the following key obstacles to growth: inaccessibility of funding (52%), lack of government support (50%) and shortage of workers (32%).

Fruits and berries producers are trying to improve their technical level. According to the branch association Ukrsadprom, in 2018 the total capacity of commissioned fruit storage facilities was about 20,000 tonnes. However, most of the storage facilities are still low-functioning with a very long shelf life (over 30 years). Currently, more than half of the farms use storage facilities, and refrigerators with regulated gas environments - one in three. The most optimistic is the irrigation situation - according to the Association, nearly 60% of industrial gardens are now covered by irrigation systems. It is most common when growing apples, pears, nuts, peaches and berries. In particular, irrigation is carried out on most apple orchards, 4/5 areas of pear, as well as almost 60% of the area of industrial nut gardens. Due to the fact that many plantings with irrigation have not yet

entered the cycle of full fruiting, so far, businesses are collecting only a third of their crop from irrigated areas.

51% of companies indicated a lack of government support to the sector. First of all, representatives of the sector highlighted that horticultural companies have been fully compensated for planting material. One of the most urgent problems that needs state support is reviewing the program to reimburse the cost of building a refrigerator for fruit towards adapting it to berry farms. The capacity criterion for such equipment compensation from the state budget should be reduced from 500 tons, as required by the current government decree, to 50-100 tons. Refrigeration equipment with a capacity of 500 tons or more is used by large apple-producing companies. And for blueberries, currants, blackberries, refrigerators with less capacity is needed.

Inaccessibility of funding is ranked the second among challenges. Limited access to cheap credit resources (compared with neighbouring countries) which prevents expansion of investment in assets and hinders development of both horticulture and food processing.

Like in other sectors, fruits and berries production companies experience difficulties with recruiting staff. This is compounded by outward migration to the EU.

There is also a problem with a lack of storage facilities, especially with new equipment and technology level. Given the short shelf life of fruits and berries, availability of refrigeration capacity is a key factor for the development of this segment in Ukraine. The lack of sufficiently refrigerators and the need for additional packaging costs (for the products preservation during transportation over long distances) are constraining for growing berries and stone fruit crops.

Another challenge is a lack of capacities for dried and frozen fruit and berries production. Poor production segment of dried fruits and frozen products in Ukraine in connection with the need for large investments in equipment (the purchase and creation of modern dryers and adoption of modern production skills).

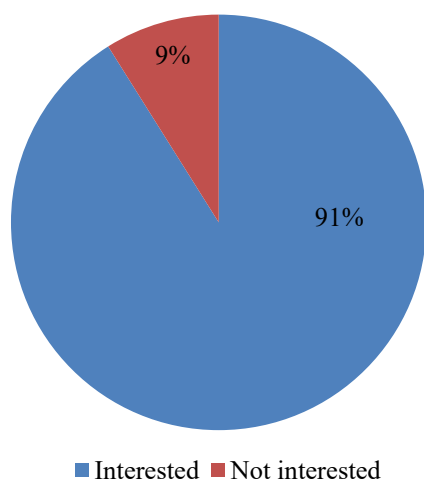


Fig. 2.23. The interest of production of fruits and berries enterprises in cooperation with the Dutch business

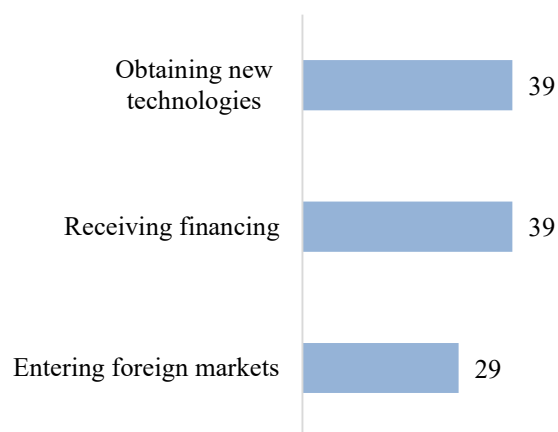


Fig. 2.24. Main areas of potential cooperation with the Dutch business in production of fruits and berries, %

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 91% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (39%), receiving financing (39%) and entering foreign markets (29%).

SWOT analysis of the sector

<p>S (strengths)</p> <ul style="list-style-type: none"> – Favourable climatic conditions; – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Availability of government support, compared to other industries; – Availability of qualified specialists in horticulture; – Our own research base and in-depth collaboration with national research institutes 	<p>W (weaknesses)</p> <ul style="list-style-type: none"> – Slow application of contemporary technologies; – Low level of certification (Global GAP); – Low availability of fruit storage facilities; – Information asymmetry (lack of awareness) does not allow planning and forecasting of demand and sales of fruits, which leads to periodic overproductions or deficits for individual crops; – Lack of capacity to freeze fruits; – High percentage of small-scale production and underdevelopment of cooperation between producers
<p>O (opportunities)</p> <ul style="list-style-type: none"> – Opening of the land market (reducing the risk of lease termination); – Opportunities to export to the growing Asian markets 	<p>T (threats)</p> <ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Delaying the timing of land market opening; – Climate change, which can stimulate changing planting areas of varieties and types of crops; – Insufficient experience in meeting the requirements for raw material quality

2.3. Production of vegetables and mushrooms

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 484 enterprises producing vegetables and mushrooms, of which 230 are legal entities (48%), and 254 - individual entrepreneurs (52%). The largest number of companies operates in Kyiv region (179 units or 37%), and the least - in Kirovohrad region (20 units or 4%).

The sector is employing 3 755 full-time employees, including 3 348 in legal entities (89%), and 407 are employed by individual entrepreneurs (about 11%). The sector's leader by the number of employees is Kyiv region (1 528 people or 41%), while the smallest employment in the sector is in Kirovohrad region (53 people or 1%).

Table 2.14. Number of functioning enterprises and employment in production of vegetables and mushrooms in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	24	29	53	868	42	910
Chernihiv	40	44	84	201	57	258
Khmelnyskiy	14	25	39	57	84	141
Kirovohrad	10	10	20	43	10	53
Kyiv	91	88	179	1 411	117	1 528
Vinnitsia	28	46	74	349	72	421
Zhytomyr	23	12	35	419	25	444
Total	230	254	484	3 348	407	3 755

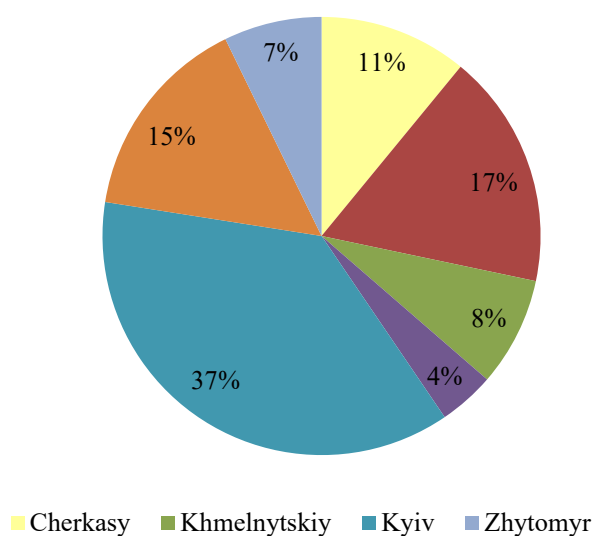


Fig. 2.25. Breakdown of production of vegetables and mushrooms enterprises by regions

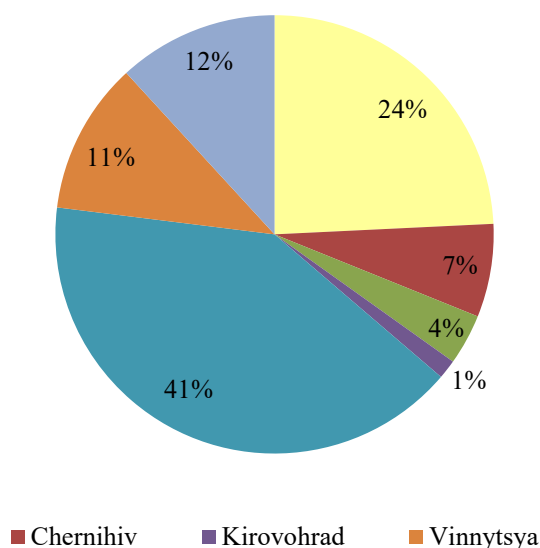


Fig. 2.26. Regional employment structure in production of vegetables and mushrooms

Sales

In 2018, sales volume of vegetables and mushrooms enterprises amounted to about UAH 3 931 million, of which UAH 3 802 million were generated by legal entities (97%), and the rest UAH 130 million – by individual entrepreneurs (about 3%).

In the regional structure, the leaders are Kyiv region (UAH 1 222 million or 31% of sales) and Cherkasy region (UAH 1 105 million or 28% - big greenhouse vegetable producer Private-leasing agricultural enterprise “Uman greenhouse complex”, which generate the main part of sales). Together, these regions account for more than 59% of vegetables and mushrooms sales among 7 Central Ukrainian regions under investigation.

According to the results of companies’ survey, the average level of sales through retail networks in vegetables and mushrooms production is about 40%.

Table 2.15. The volume of sales of vegetables and mushrooms enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	1 094.8	10.4	1 105.1
Chernihiv	247.9	27.3	275.2
Khmelnyskiy	486.1	13.5	499.6
Kirovohrad	62.7	5.1	67.9
Kyiv	1 174.1	47.4	1 221.5
Vinnytsia	519.6	21.2	540.7
Zhytomyr	216.3	4.7	221.0
Total	3 801.5	129.5	3 931.1

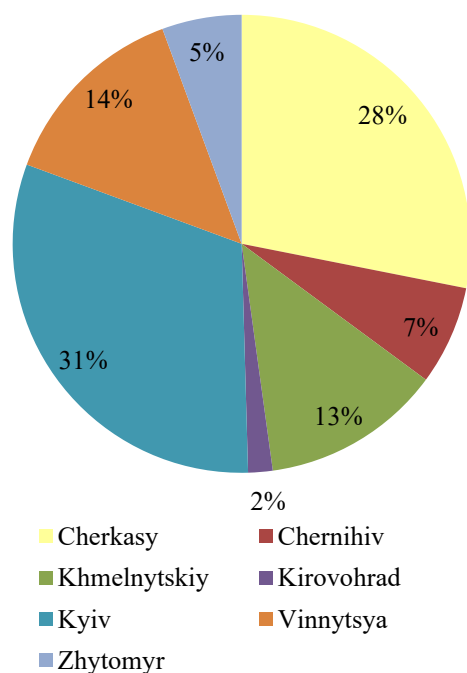


Fig. 2.27. Regional sales of vegetables and mushrooms products

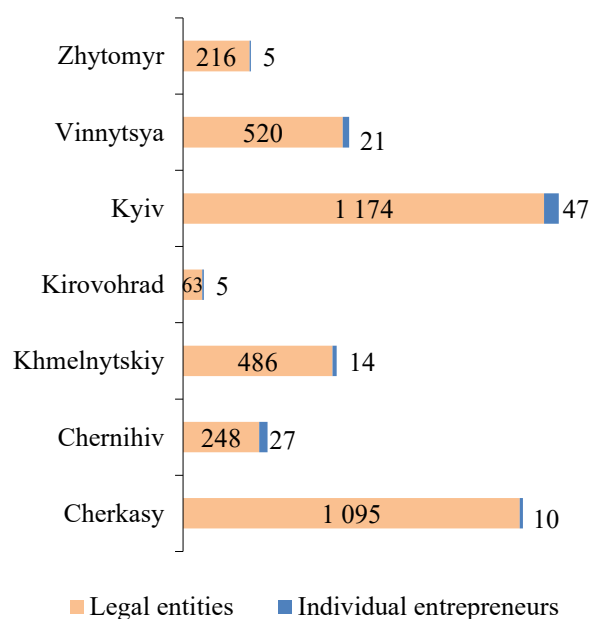


Fig. 2.28. Regional sales of production of vegetables and mushrooms products by type of business entity, mln. UAH

Production

In 2018, volumes of vegetable production in open fields and greenhouses in the seven studied regions amounted to 2.5 mln. tons, which is ~26% of the total Ukrainian production.

The bulk of the vegetables is grown in households (~ 92%), mainly for their own consumption and sales at the fresh markets. Agricultural enterprises production volumes (including for processing) total amount of 198 thousand tons. The largest production of marketable vegetables is in Cherkasy region (~105 thousand tons).

Growing of vegetables by agricultural enterprises is limited by the underdeveloped processing (lack of large processing enterprises) and storage infrastructure (vegetable storages, refrigerators).

Table 2.16. Volumes of vegetables production in open fields and greenhouses in 2018

Region	Total area of the plantations, thsd.ha			Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total	Agricultural enterprises	Households	Total
Vegetables - total						
Cherkasy	5.0	14.0	19.0	104.9	249.8	354.7
Chernihiv	0.3	10.8	11.1	5.5	184.7	190.2
Khmelnytskyi	0.3	11.0	11.3	7.8	255.0	262.8
Kirovohrad	1.0	17.2	18.2	5.8	251.8	257.6
Kyiv	1.2	28.4	29.6	53.5	550.7	604.2
Vinnytsia	0.3	20.9	21.2	12.5	448.9	461.4
Zhytomyr	0.2	14.3	14.5	8.1	332.1	340.1
Total	8.3	116.6	124.9	198.0	2 273.1	2 471.0
Total production in Ukraine	31.3	409.0	440.3	1 357.1	8 083.1	9 440.2
Share of 7 regions in Ukraine production	27%	29%	28%	15%	28%	26%
including vegetables grown in the open						
Cherkasy	5.0	13.9	18.9	88.7	246.1	334.8
Chernihiv	0.3	10.7	11.0	5.1	181.1	186.1
Khmelnytskyi	0.3	10.9	11.2	7.2	250.3	257.5
Kirovohrad	1.0	17.2	18.2	5.8	249.8	255.6
Kyiv	1.2	28.0	29.2	31.2	541.6	572.8
Vinnytsia	0.2	20.6	20.9	5.3	442.5	449.5
Zhytomyr	0.0	0.0	14.4	5.4	324.3	329.7
Total	8.0	101.3	123.8	148.6	2 235.8	2 386.1
Total production in Ukraine	30.9	402.9	433.8	1 261.0	7 623.5	8 884.5
Share of 7 regions in Ukraine production	26%	25%	29%	12%	29%	27%
including vegetables grown in greenhouses						
Cherkasy	0.0	0.2	0.2	16.2	3.7	19.9
Chernihiv	0.0	0.0	0.0	0.4	3.6	4.1
Khmelnytskyi	0.0	0.1	0.1	0.6	4.7	5.3
Kirovohrad	0.0	0.0	0.0	0.0	2.0	2.0

Region	Total area of the plantations, thsd.ha			Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total	Agricultural enterprises	Households	Total
Kyiv	0.0	0.4	0.4	22.3	9.2	31.5
Vinnitsia	0.1	0.3	0.3	7.2	6.4	11.9
Zhytomyr	0.0	0.0	0.1	2.7	7.7	10.4
Total	0.2	1.0	1.1	49.4	37.3	85.0
Total production in Ukraine	0.4	6.0	6.5	96.1	459.6	555.7
Share of 7 regions in Ukraine production	44%	16%	18%	51%	8%	15%

Source: State Statistics Service of Ukraine

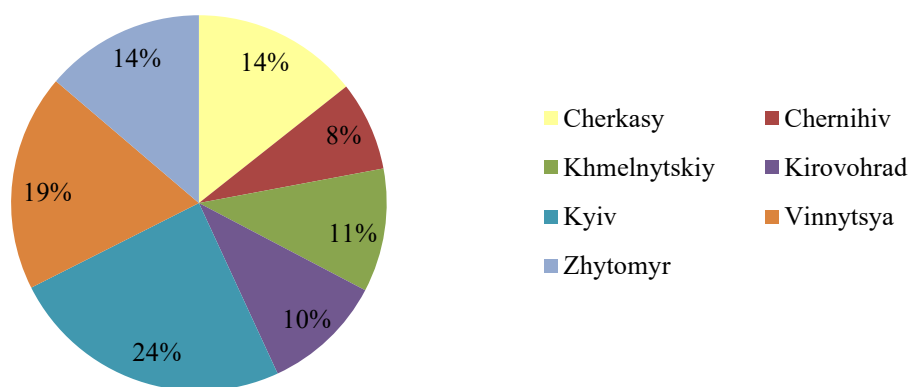


Fig. 2.29. Regional structure of vegetables production in 2018

The volume of greenhouse vegetables production in 7 Central Ukrainian regions under investigation in 2018 amounted to 85 thousand tons (about 15% of the total production in Ukraine), of which 49 thousand tons were grown by agricultural enterprises (58%), and 37 thousand tons - households (42%). Kyiv region dominates in production (36% of plantations area and 37% of production).

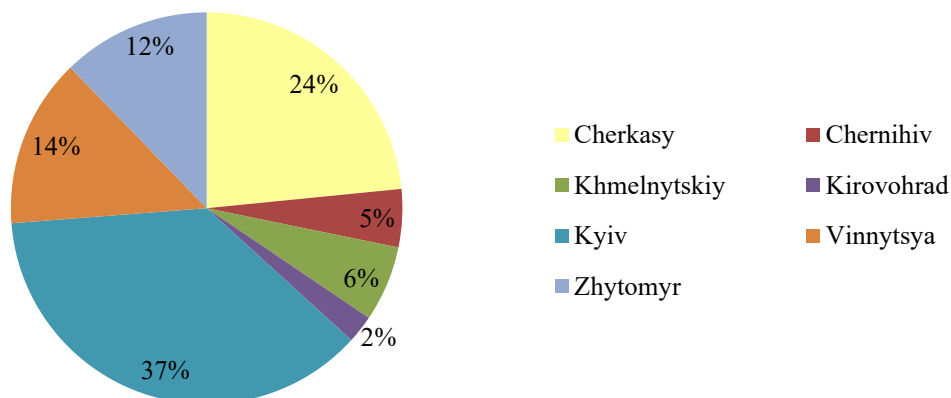


Fig. 2.30. Regional breakdown of greenhouse vegetables production in 2018

The volumes of potato production in the studied regions in 2018 amounted to 9.9 million tons, or ~ 44% of the total Ukrainian production.

The bulk of potatoes are grown in households (98%), mainly for own consumption and sales at the markets in fresh form. The volume of commercial potato cultivation in 7 regions is only 239 thousand tons. The largest production of commercial potatoes in the Chernihiv region (~101 thousand tons).

Potato production by agricultural enterprises in the studied areas limits the underdevelopment of processing (lack of large processing enterprises, in particular, starch factories) and storage infrastructure (vegetable stores).

Table 2.17. Volumes of potato production in 2018

Region	Total area of the plantations, thsd.ha			Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total	Agricultural enterprises	Households	Total
Cherkasy	0.6	47.8	48.4	26.8	889.1	915.9
Chernihiv	3.9	70.3	74.2	101.1	1 306.9	1 408.0
Khmelnyskiy	0.1	66.6	66.7	2.6	1 384.2	1 386.9
Kirovohrad	0.0	43.5	43.5	0.3	575.5	575.8
Kyiv	1.6	90.8	92.4	44.1	1 786.6	1 830.7
Vinnytsia	0.2	109.6	109.8	2.4	1 905.2	1 907.6
Zhytomyr	2.4	87.8	90.2	61.4	1 817.8	1 879.2
Total	8.8	516.4	525.2	238.7	9 665.3	9 904.0
Total production in Ukraine	16.2	1 303.7	1 319.9	416.4	22 087.6	22 504.0
Share of 7 regions in Ukraine production	54%	40%	40%	57%	44%	44%

Source: State Statistics Service of Ukraine

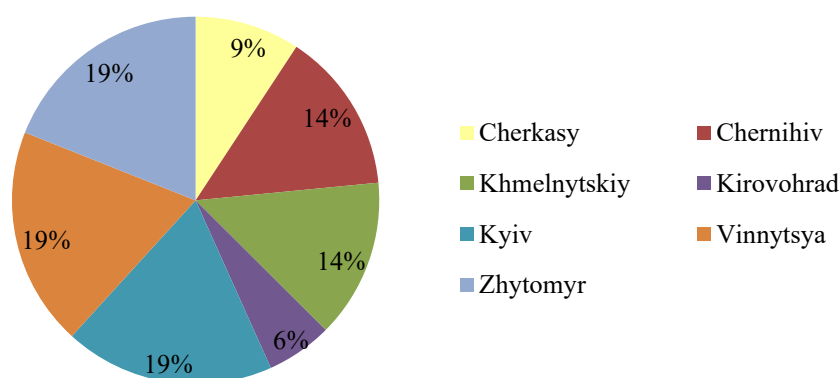


Fig. 2.31. Regional structure of potato production in 2018

Export

In 2018, the volume of vegetables and mushrooms exports in 7 Central Ukrainian regions under investigation amounted to about USD 44.9 million, of which almost 62% was generated by Chernihiv region (USD 10.4 million), Kyiv region (USD 8.8 million) and Cherkasy region (USD 8.8 million).

Main foreign sales markets are India (16%), Poland (15%) and Spain (9%).

Table 2.18. The volume of vegetables and mushrooms export in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Dried leguminous vegetables, shelled	3 160	6 947	4 367	875	2 387	3 132	2 581	23 450
Leguminous vegetables, shelled or unshelled, fresh or chilled	488	291	724	338	3 750	3 146		8 738
Tomatoes, fresh or chilled	2 251	1 161			1 204	4		4 622
Potatoes, fresh or chilled	3	1 608			639	103	433	2 787
Cucumbers and gherkins, fresh	1 889	65			729			2 683
Other vegetables, fresh	805	175	2		13	311	391	1 697
Onions, shallots, garlic, leeks and other alliacious vegetables	154	87		13	53	109	68	483
Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled		14			19	258		291
Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots		14			30		61	104
Lettuce, fresh or chilled					14			14
Total	8 750	10 363	5 093	1 227	8 838	7 064	3 534	44 869

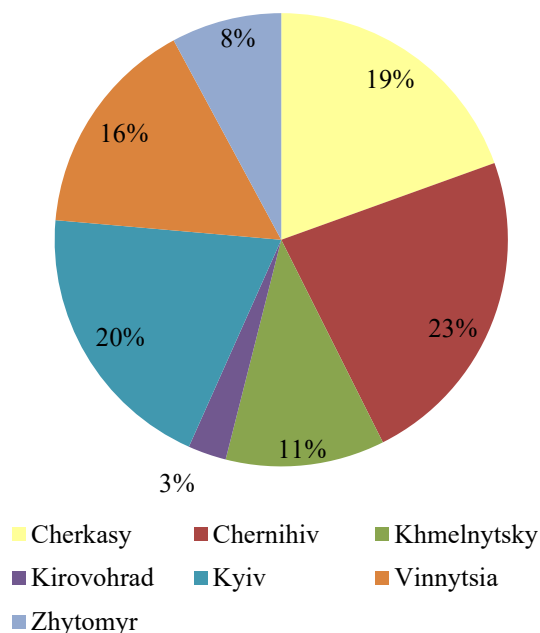


Fig. 2.32. Regional breakdown of vegetables and mushrooms export

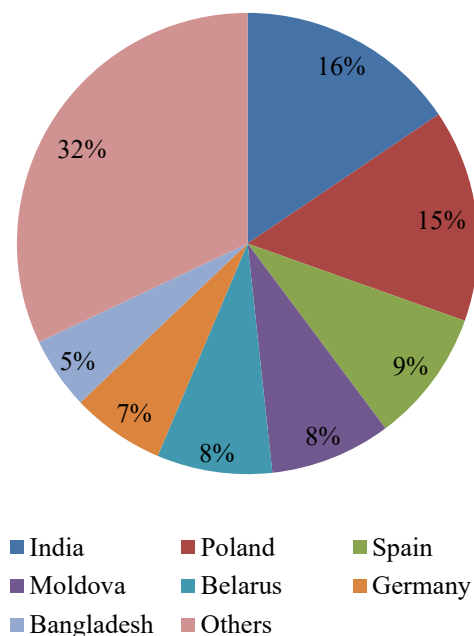


Fig. 2.33. Vegetables and mushrooms export by destinations

Leading companies of the sector

The main production of vegetables and mushrooms in 7 Central Ukrainian regions under investigation are Private-leasing agricultural enterprise “Uman greenhouse complex”, PJSC “Greenhouse” Combine and Private Enterprise “Impac”.

Table 2.19. Leading vegetables and mushrooms production companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
2779234	Private-leasing agricultural enterprise "Uman greenhouse complex"	Приватно-орендне сільськогосподарське підприємство "Уманський тепличний комбінат"	more than 100
5528361	PJSC "Greenhouse" Combine	ПрАТ "Комбінат "Тепличний"	more than 100
13560947	Private Enterprise "Impac"	Приватне Підприємство "Імпак"	more than 100
32119941	Private Enterprise "Pancheve Agro Firm"	Приватне Підприємство "Агрофірма "Панчеве"	more than 100
38419387	Fino Verde LLC	ТОВ "Фіно Верде"	more than 100
3793142	Volia Agricultural LLC	Сільськогосподарське ТОВ "Воля"	more than 100
31315342	"Ukrflora-Vinnytsia" LLC	ТОВ "Украфлора-Вінниця"	50-100
39583662	PJSC "Greenhouse Plant"	ПАТ "Тепличний комбінат"	50-100
34223663	"Domantivske" LLC	ТОВ "Домантівське"	50-100
22917147	"Biotech Ltd." LLC	ТОВ "Біотех Лтд"	50-100

Regional distribution of the largest companies in the sector are shown in Table 2.15.

Table 2.20. Top-10 companies-producers of vegetables and mushrooms by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	31315342	"Ukrflora-Vinnytsia" LLC	ТОВ "Украфлора-Вінниця"	50-100
	35469864	American Technologies Private Enterprise	Приватне Підприємство "Американські Технології"	25-50
	34610066	Hortek Farming Enterprise	Фермерське господарство "Хортек"	less than 25
	38844447	Demivka-Agro Farming Enterprise	Фермерське господарство "Демівка-Агро"	less than 25
	41719602	Organic-D LLC	ТОВ "Органік-Д"	less than 25
	13339160	Vitamin Farming Enterprise	Фермерське господарство "Вітамін"	less than 25
	20117394	Farming Enterprise "Berzhan PG"	Селянське Фермерське Господарство "Бержан П.Г."	less than 25
	20082201	Farming Enterprise "Solsky Vasyl Dmitrovich"	Фермерське господарство "Сольський Василь Дмитрович"	less than 25
	37248130	Farming Enterprise "Zerniatko-2011"	Фермерське господарство "Зернятко-2011"	less than 25
	20118270	Farming Enterprise "Natalya"	Селянське Фермерське господарство "Наталя"	less than 25
Kyiv	5528361	PJSC "Greenhouse" Combine	ПрАТ "Комбінат "Тепличний"	more than 100
	38419387	Fino Verde LLC	ТОВ "Фіно Верде"	more than 100
	39583662	PJSC "Greenhouse Plant"	ПАТ "Тепличний комбінат"	50-100
	22917147	"Biotech Ltd." LLC	ТОВ "Біотех Лтд"	50-100
	34628124	Dingbo LLC	ТОВ "Дінбо"	50-100
	32810449	"Ukrainian Champignons" LLC	ТОВ "Українські Печериці"	25-50
	36594768	Yablunivsky Industrial Complex Private Enterprise	Приватне Підприємство "Яблунівський Виробничий Комплекс"	less than 25
	39123226	"Trading House"	ТОВ "Торговий Дім"	less than 25

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
		Ukrkartoplya” LLC	“Укркартопля”	
	39638184	Eco Fanji LLC	ТОВ “Еко Фанжи”	less than 25
	30796323	Agricultural LLC “Buchanskoe”	Сільськогосподарське ТОВ “Бучанське”	less than 25
Khmelnyskiy	32607385	Triumph Farming Enterprise	Фермерське господарство “Тріумф”	less than 25
	32086089	Private Enterprise “Crystal”	Приватне Підприємство “Кристал”	less than 25
	21312318	Agroservice Private Enterprise	Приватне Підприємство “Агросервіс”	less than 25
	39794387	Dubovo-Agro LLC	ТОВ “Дубово-Агро”	less than 25
	40631611	Farming Enterprise “Loshkivske”	Фермерське господарство “Лошківське”	less than 25
	35604942	Farming Enterprise “Concentrate”	Фермерське господарство “Концентрат”	less than 25
	35836124	Farming Enterprise “Grynychuk”	Фермерське господарство “Гринчук”	less than 25
	31653975	Farming Enterprise “Kalyna 2002”	Фермерське господарство “Калина 2002”	less than 25
	31424708	Farming Enterprise BVV “,”	Фермерське господарство “БВВ”	less than 25
	34075414	Private Enterprise “Radsad”	Приватне Підприємство “Радсад”	less than 25
Cherkasy	2779234	Private-leasing agricultural enterprise “Uman greenhouse complex”	Приватно-орендне сільськогосподарське підприємство “Уманський Тепличний комбінат”	more than 100
	3793142	Volia Agricultural LLC	Сільськогосподарське ТОВ “Воля”	more than 100
	34223663	“Domantivske” LLC	ТОВ “Домантівське”	50-100
	41461910	“Kyshchentsi Fruts” LLC	ТОВ “Кишенці Фруктс”	25-50
	36318285	Farming Enterprise “Veselokhutirskoe”	Фермерське господарство “Веселохутірське”	less than 25
	31947679	Agricultural Farming Enterprise “Romashka”	Селянське (Фермерське) Господарство “Ромашка”	less than 25
	25583847	Agricultural Farming Enterprise “Zorya”	Селянське (Фермерське) Господарство “Зоря”	less than 25
	31207277	“Slavia-M” LLC	ТОВ “Славія- М”	less than 25
	21356669	Private Enterprise “Marshan”	Приватне Підприємство “Маршан”	less than 25
	14214549	Collective Enterprise “Sadovod”	Колективне Підприємство “Садовод”	less than 25
Zhytomyr	13560947	Impak Private Enterprise	Приватне підприємство “Імпак”	more than 100
	32576923	“Vegetable Plant Stanyshivka” LLC	ТОВ “Овочевий Комбінат Станішівка”	25-50
	37808110	Annandel LLC	ТОВ “Анналанд”	less than 25
	31599714	Farming enterprise “Helios Farm	Фермерське господарство “Геліос”	less than 25
	40192895	Farming enterprise “Ukragro-Dar”	Фермерське господарство “Украгро-Дар”	less than 25
	20412495	Farming enterprise “Omelchenko”	Фермерське господарство “Омельченка”	less than 25

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	37220733	Farming enterprise "Dvirets"	Фермерське господарство "Двірець"	less than 25
	39501854	"Newland" LLC	ТОВ "Новоланд"	less than 25
	34066180	Farming enterprise "Tsaritsyno"	Фермерське господарство "Царіцино"	less than 25
	40046585	Private enterprise "Churyky"	Приватне підприємство "Чурики"	less than 25
Kirovohrad	32119941	Private enterprise "Panchevo Agro Firm"	Приватне підприємство "Агрофірма "Панчеве"	more than 100
	35046688	"Research and Production Complex Eco-Gryb" LLC	ТОВ науково-виробничий комплекс "Еко-Гриб"	less than 25
	36252002	"Brassika-2010" LLC	ТОВ "Брассіка-2010"	less than 25
	23678236	SK-Yatran Sports Club subsidiary of Vivaton Company	Спортивний Клуб "СК-Ятрань" дочірнє підприємство Фірми "Віватон"	less than 25
	38500891	"Solar Enterprise" LLC	ТОВ "Сільськогосподарське Підприємство "Сонечко"	less than 25
	39284322	Farming enterprise of Liu Volodymyr Volodymyrovych	Фермерське господарство Лю Володимира Володимировича	less than 25
	22223404	Farming enterprise "Rostock"	Фермерське господарство "Росток"	less than 25
Chernihiv	31637026	Subsidiary enterprise "Levona-C" of the Private enterprise "Levona"	Дочірнє Підприємство "Левона-С" Приватного Підприємства "Левона"	25-50
	37652123	"Vegetable Group" LLC	ТОВ "Овочева Група"	25-50
	39174244	AF Andriyivske LLC	ТОВ "АФ Андріївське"	25-50
	3795537	Agricultural LLC Desna	Сільськогосподарське ТОВ "Десна"	25-50
	24839440	PJSC "Intergrossystem" Corporation	ПрАТ "Корпорація "Інтерагросистема"	25-50
	35770645	Viva Plus LLC	ТОВ "Віва-Плюс"	less than 25
	34238706	Farming enterprise "Siver"	Фермерське господарство "Сівер"	less than 25
	30894600	Farming enterprise "Lavra"	Фермерське господарство "Лавр"	less than 25
	36956159	Farming enterprise "North Mark"	Фермерське господарство "Північна Марка"	less than 25
	38289927	Farming enterprise "Agrocontract"	Фермерське господарство "Агроконтракт"	less than 25

Key obstacles observed in the sector

While identifying main obstacles for the development of vegetables production in 7 Central Ukrainian regions under investigation 39 companies were contacted, of which 34 (87%) agreed to participate in the survey, and 5 (13%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

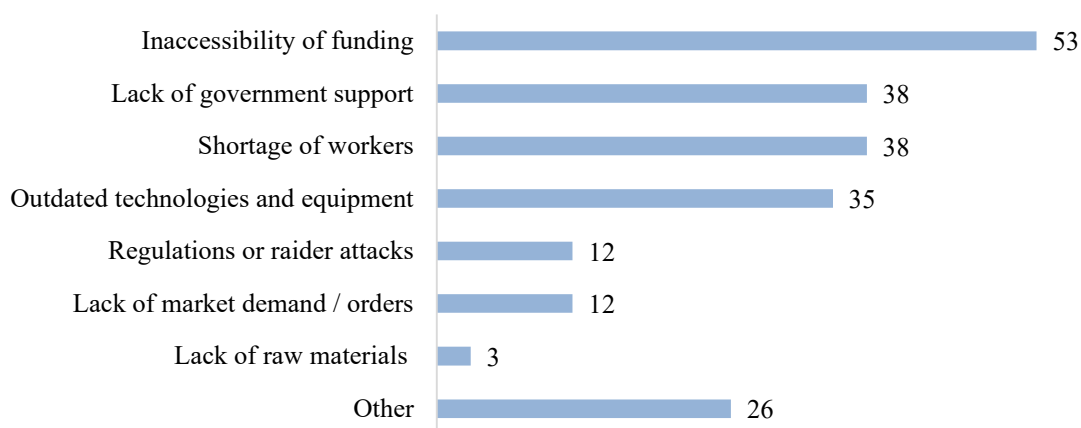


Fig. 2.34. The rating of main obstacles for the development of vegetables production industry in 7 Central Ukrainian regions under investigation, %

The Ukrainian vegetables production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: inaccessibility of funding (53%), lack of government support (38%) and shortage of workers (38%).

Lack of government support is expressed in the inefficient system of agri-donations (when major beneficiaries are large agricultural holdings, and small producers, including vegetable growers, do not receive them), lack of long-term programs of preferential lending, lack of government procurement of vegetables (for example, the army is supplied by the imported vegetables and potatoes).

The cultivation of vegetables and potatoes has a noticeable seasonality, and it is difficult for the sector to compete for the labour force with other industries with permanent employment and seasonal jobs in neighboring countries. A possible solution is an introduction of modern high-performance technologies, which can ensure higher salaries.

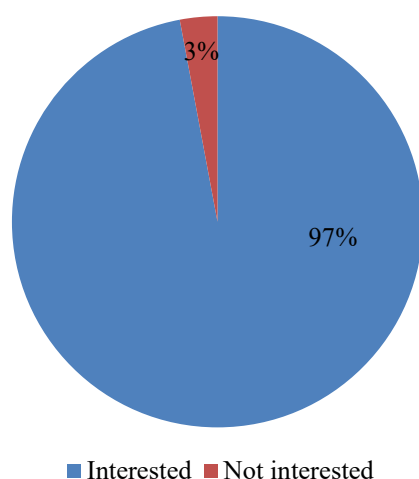


Fig. 2.35. The interest of vegetables production enterprises in cooperation with the Dutch business

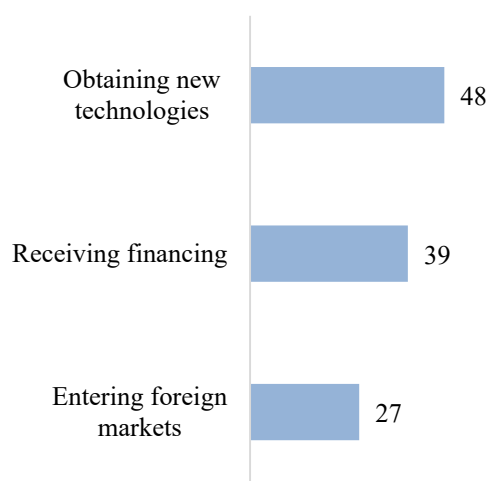


Fig. 2.36. Main areas of potential cooperation with the Dutch business in the production of vegetables, %

Small producers of vegetables, due to limited access to financing, are not able to purchase modern technologies (high-yield seeds, equipment and machinery) that limit their productivity and, accordingly, competitiveness. They also experience monopoly pressure from processing enterprises and owners of vegetable stores.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, 97% of surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (48%), receiving financing (39%) and entering foreign markets (27%).

SWOT analysis of the sector

S (strengths)	W (weaknesses)
<ul style="list-style-type: none"> – Favourable climatic conditions; – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Availability of government support, compared to other industries; – Availability of qualified specialists in vegetable growing; – Our own research base and in-depth collaboration with national research institutes 	<ul style="list-style-type: none"> – Slow application of contemporary technologies; – Low level of certification (Global GAP); – Low availability of vegetable storage facilities; – Information asymmetry (lack of awareness) does not allow planning and forecasting of demand and sales of vegetables, which leads to periodic overproductions or deficits for individual crops; – Lack of capacity to freeze vegetables; – High percentage of small-scale production and underdevelopment of cooperation between producers
O (opportunities)	T (threats)
<ul style="list-style-type: none"> – Opening of the land market (reducing the risk of lease termination); – Opportunities to export to the growing Asian markets 	<ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Delaying the timing of land market opening; – Climate change, which can stimulate changing planting areas of varieties and types of crops; – Insufficient experience in meeting the requirements for raw material quality

2.4. Production of milk

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 386 enterprises producing milk, of which 333 are legal entities (86%), and 53 - individual entrepreneurs (about 11%).

The largest number of companies operates in the Zhytomyr region (80 units or 17%), and the least - in Kirovohrad region (26 units or 7%).

The sector is employing 17 808 full-time employees, including 17 687 in legal entities (99%), and 121 are employed by individual entrepreneurs (about 1%). The sector's leader by the number of employees is Cherkasy region (4 798 people or 27%), while the smallest employment in the sector is in Kirovohrad region (559 people or 3%).

Table 2.21. Number of functioning enterprises and employment in milk production in 2018 (without private households)

Region	Number of companies, units			Employment, people*		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	48	4	52	4 794	4	4 798
Chernihiv	68	1	69	3 418	1	3 419
Khmelnyskiy	36	11	47	2 465	12	2 477
Kirovohrad	19	7	26	533	26	559
Kyiv	53	11	64	3 189	48	3 237
Vinnytsia	34	14	48	1 480	25	1 505
Zhytomyr	75	5	80	1 808	5	1 813
Total	333	53	386	17 687	121	17 808

* - does not include data of companies engaged in several sectors and large agricultural holdings

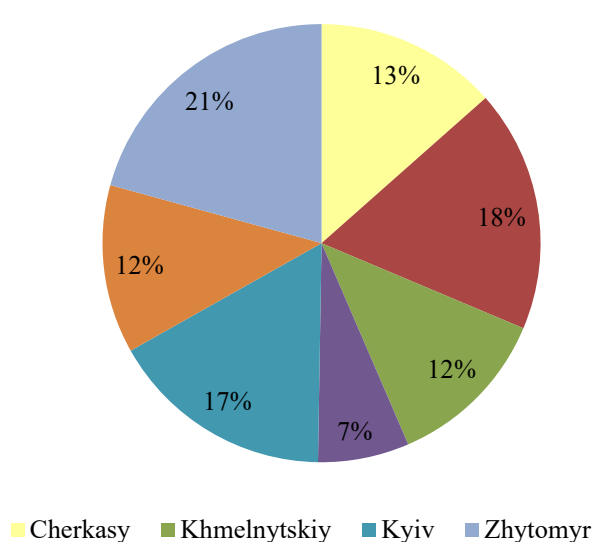


Fig. 2.37. Breakdown of milk production enterprises by regions (without private households)

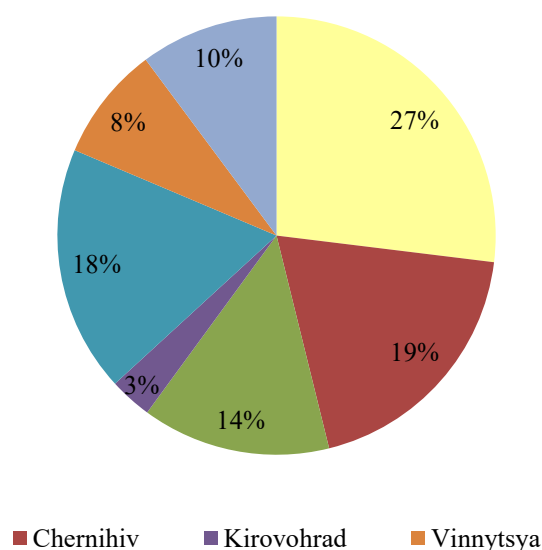


Fig. 2.38. Regional employment structure in production of milk (without private households)

Sales

In 2018, sales volume of milk enterprises amounted to about UAH 10 883 million, of which UAH 10 844 million were generated by legal entities (almost 100%), and the rest UAH 39 million – by individual entrepreneurs (about 0.4%).

In the regional structure, the leaders are Cherkasy region (UAH 2 519 million or 23% of sales), Kyiv region (UAH 2 017 million or 19%) and Chernihiv region (UAH 1 999 million or 18%). Together, these regions account for more than 60% of milk sales among 7 Central Ukrainian regions under investigation.

Table 2.22. The volume of sales of milk production enterprises in 2018, mln. UAH (without private households)

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	2 517.5	1.7	2 519.2
Chernihiv	1 998.3	1.0	1 999.3
Khmelnyskiy	1 393.7	2.3	1 396.0
Kirovohrad	621.9	5.2	627.1
Kyiv	1 996.7	20.7	2 017.4
Vinnytsia	1 428.1	5.9	1 434.0
Zhytomyr	887.9	1.8	889.7
Total	10 844.1	38.6	10 882.8

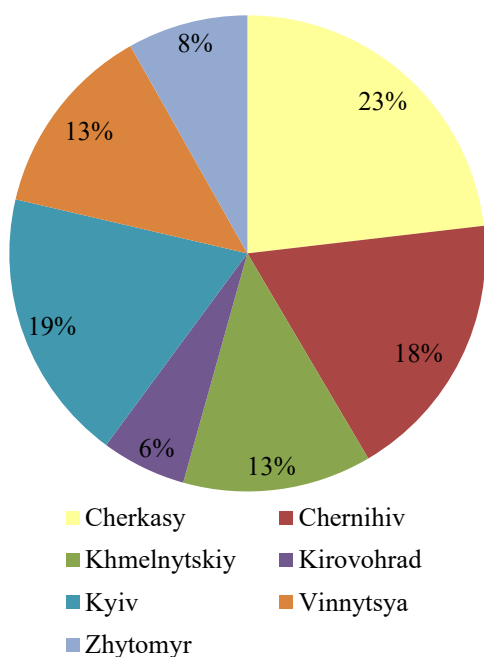


Fig. 2.39. Regional sales of milk production (without private households)

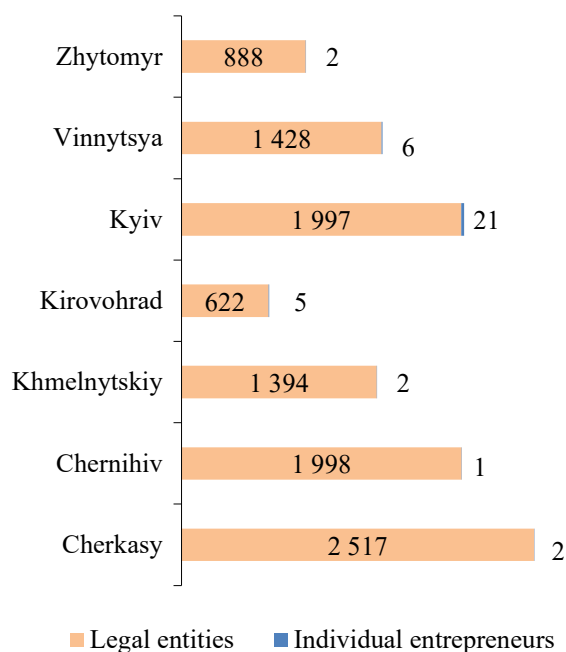


Fig. 2.40. Regional sales of milk production by type of business entity, mln. UAH (without private households)

Production

The volumes of milk production in the three studied regions in 2018 amounted to ~ 3.8 million tons, or ~ 37% of the total Ukrainian production.

The bulk of milk in the area is produced by the households (65%), of which only a part is sold to dairies for further processing (15% in 2018), while virtually all milk produced in agricultural enterprises is processed (99%).

In the regional structure of milk production, the leaders are Vinnytsia region (825 thsd. tons or 22% of production), Khmelnytskyi region (624 thsd. tons or 17%) and Zhytomyr region (553 thsd. tons or 15%). Together, these regions account for more than 54% of milk production among the 7 Central Ukrainian regions under investigation.

In the regional structure of agricultural enterprises milk production, the leaders are Cherkasy region (292 thsd. tons or 22% of production) and Chernihiv region (245 thsd. tons or 19%).

Table 2.23. The volumes of milk production in 2018, thousand tons

Region	Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total
Cherkasy	292	193	484
Chernihiv	245	292	537
Khmelnytskyi	168	456	624
Kirovohrad	62	246	308
Kyiv	222	211	433
Vinnytsia	204	621	825
Zhytomyr	116	437	553
Total	1 309	2 455	3 764
Total production in Ukraine	2 756	7 308	10 064
Share of 7 regions in Ukraine production	47%	34%	37%

Source: State Statistics Service of Ukraine

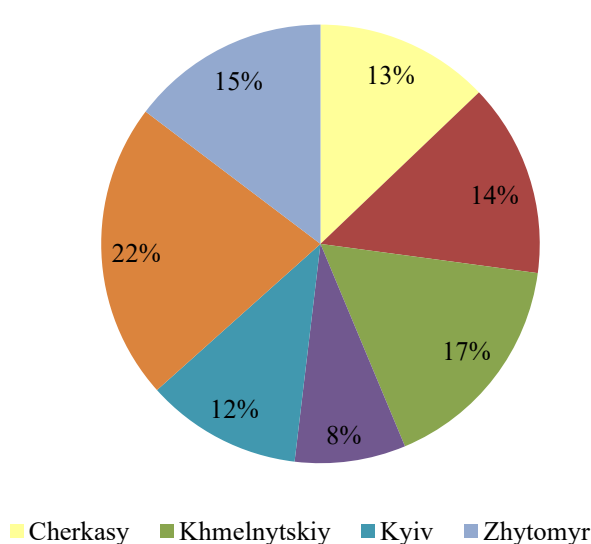


Fig. 2.41. Regional breakdown of milk production in 2018

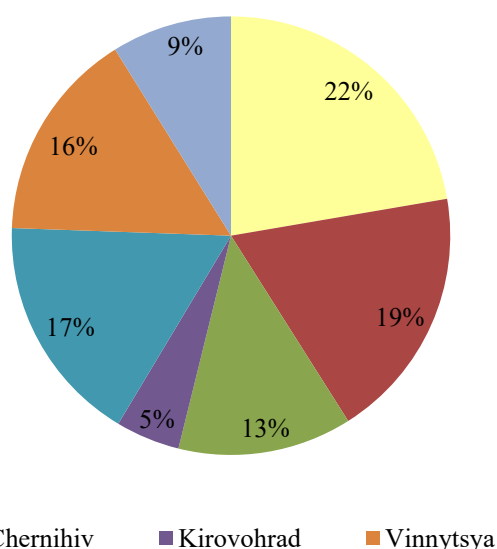


Fig. 2.42. Regional breakdown of milk production by agricultural enterprises in 2018

Export

Exports of raw milk are not carried out, and only milk products are exported.

Leading companies of the sector

The main milk production companies in 7 Central Ukrainian regions under investigation are Private enterprise Podillya Agroprodukt LLC, Kishchenzi LLC and “Ukrainian Dairy Company” LLC.

Table 2.24. Leading milk production companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
34099131	“Ukrainian Dairy Company” LLC	ТОВ “Українська Молочна Компанія”	more than 100
30327425	LLC “Ukragrocom”	ТОВ “Украгроком”	more than 100
32678236	Podilsky Hospodar LLC	ТОВ “Подільський Господар”	more than 100
3793107	Pleskany Private Agricultural Enterprise	Приватне сільськогосподарське підприємство “Плешкані”	more than 100
35080933	LLC “Ukraine 2001”	ТОВ “Україна 2001”	more than 100
31561188	Agricultural LLC “Agroko”	Сільськогосподарське ТОВ “Агроко”	more than 100
5407982	“Terezyne” ALC	ТДВ “Терезине”	more than 100
5526770	Progress LLC	ТОВ “Прогрес”	more than 100
3794785	Piskivske Private Agricultural Enterprise	Приватне сільськогосподарське підприємство “Пісківське”	more than 100
31561125	Kishchenzi LLC	ТОВ “Кищенці”	more than 100

Regional distribution of the largest companies in the sector is shown in Table 2.20.

Table 2.25. Top-10 milk production companies by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	20105221	Private-lease agricultural enterprise “Napadovskoye”	Приватно-орендне сільськогосподарське підприємство “Нападівське”	more than 100
	32547211	Gaysin Branch of PJSC “Grain Products MHP”	Гайсинська Філія ПрАТ “Зернопродукт МХП”	more than 100
	35718077	Farming enterprise “Veles Vita Farm”	Фермерське господарство “Велес Віта”	more than 100
	34009446	Zorya Podillya Food Company LLC	ТОВ “Продовольча Компанія “Зоря Поділля”	more than 100
	846180	PJSC “Brewery” Litinsky “	ПрАТ “Племзавод “Літинський”	more than 100
	32721857	“Agro Complex” LLC Green Valley “	ТОВ “Агрокомплекс “Зелена Долина”	more than 100
	37694870	Agricultural Production Cooperative “Dobri Spravy”	Сільськогосподарський Виробничий Кооператив “Добрі Справи”	25-50
	33143011	PJSC “Podillia”	ПрАТ “Поділля”	more than 100
	3729641	Agricultural LLC “Pysarivka”	Сільськогосподарське ТОВ “Писарівка”	50-100
	30775020	Agricultural LLC “Colos”	Сільськогосподарське ТОВ “Колос”	50-100

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Zhytomyr	13553775	Galex-Agro Private Enterprise	Приватне підприємство "Галекс-Агро"	more than 100
	38180758	Signet-Milk LLC	ТОВ "Сігнет-Мілк"	25-50
	3745025	Private agro firm "Yerchyky"	Приватна Агрофірма "Єрчики"	more than 100
	37572986	Agrovest Group LLC	ТОВ "Агровест Груп"	25-50
	3746361	Private enterprise "Ukraine"	Приватне підприємство "Україна"	50-100
	31147353	Private Enterprise Agricultural Firm "Grant"	Приватне підприємство Приватна Агрофірма "Грант"	25-50
	30714886	Agricultural Production Cooperative "Ruzhynsky"	Сільськогосподарський Виробничий Кооператив "Ружинський"	50-100
	3745054	Private Agricultural Enterprise "Novoselytsia"	Приватне Сільськогосподарське Підприємство "Новоселиця"	more than 100
	5267392	"Dolynivske" LLC	ТОВ "Долинівське"	50-100
	37042376	Agricultural Company "Myroslavel-Agro"	Сільськогосподарське ТОВ "Мирославель-Агро"	50-100
Kyiv	34099131	"Ukrainian Dairy Company" LLC	ТОВ "Українська Молочна Компанія"	more than 100
	5407982	"Terezyne" ALC	ТДВ "Терезине"	more than 100
	30641052	"Agrofirm" Kyivska "LLC	ТОВ "Агрофірма "Київська"	more than 100
	31320656	Agricultural LLC "Agrosvit"	Сільськогосподарське ТОВ "Агросвіт"	more than 100
	30771136	Private enterprise "Agro Firm" Razvolozhzhya "	Приватне підприємство "Агрофірма "Розволожжя"	more than 100
	5528438	Ostriyivske LLC	ТОВ "Острійківське"	50-100
	497696	State Enterprise "Experimental Facility "Shevchenkivsky" of Academy of Agrarian Sciences of Ukraine"	Державне підприємство "Дослідне господарство "Шевченківське" Академії Аграрних Наук України"	more than 100
	34378735	PJSC "Agrofort"	ПрАТ "Агрофорт"	more than 100
	3755348	LLC Agro firm "Matyushi"	ТОВ Агрофірма "Матюші"	50-100
	31245250	State enterprise "Chaika"	Державне підприємство "Чайка"	more than 100
Kirovohrad	31561188	Agricultural LLC "Agroko"	Сільськогосподарське ТОВ "Агроко"	more than 100
	5526770	Progress LLC	ТОВ "Прогрес"	more than 100
	3757943	Zorya Agricultural LLC	Сільськогосподарське ТОВ "Зоря"	50-100
	24744314	Olto Firm LLC	ТОВ Фірма "Олто"	more than 100
	32294030	State Enterprise "Experimental Facility "Elite" of Academy of Agrarian Sciences of Ukraine"	Державне підприємство "Дослідне господарство "Елітне" Академії Аграрних Наук України "	50-100
	34869777	LLC "Agro Firm Pyatikhatska"	ТОВ "Агрофірма П'ятихатська"	more than 100
	3758401	Zarichne Private Agricultural Enterprise	Приватне Сільськогосподарське Підприємство "Зарічне "	more than 100
	853777	Mariampolsk Agricultural Production Cooperative	Сільськогосподарський Виробничий Кооператив "Агрофірма Маріампольська "	50-100
	34141350	Farming enterprise "Jivan-Darwin"	Фермерське Господарство "Дживан-Дарвін"	less than 25

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	852476	Private-Lease Agricultural Enterprise Agricultural Firm "Sagaydatka"	Приватно-Орендне Сільськогосподарське Підприємство Агрофірма "Сагайдацька"	25-50
Khmelnyskiy	32678236	Podilsky Hospodar LLC	ТОВ "Подільський Господар"	more than 100
	35080933	"Ukraine 2001" LLC	ТОВ "Україна 2001"	more than 100
	30557165	Scientific and production agricultural firm "Pearl of Podillya" LLC	ТОВ науково-виробнича агрофірма "Перлина Поділля"	more than 100
	33007579	Agrarian Company 2004 Private Enterprise	Приватне підприємство "Аграрна Компанія 2004"	more than 100
	32523049	Maiss Farm	Фермерське Господарство "Маїс"	more than 100
	33007668	LLC "Volochnysk-Agro"	ТОВ "Волочиск-Агро"	more than 100
	32547211	Affiliate "Native Land" of PJSC "Grain Products MHP" "	Філія "Рідний Край" ПрАТ "Зернопродукт МХП"	more than 100
	34222628	Obolon Agro LLC	ТОВ "Оболонь Агро"	more than 100
	3787041	Agricultural Production Cooperative "Letava"	Сільськогосподарський Виробничий Кооператив "Летава"	50-100
Cherkasy	3793107	Private Agricultural Enterprise "Pleshkani"	Приватне сільськогосподарське підприємство "Плешкані"	more than 100
	31561188	Agricultural LLC "Agroko"	Сільськогосподарське ТОВ "Агроко"	more than 100
	31561125	Kischenzi LLC	ТОВ "Кишенці"	more than 100
	3793159	Agricultural "Agro firm "Mayak" LLC	Сільськогосподарське ТОВ "Агрофірма "Маяк"	more than 100
	14215193	Agricultural LLC "LAN"	Сільськогосподарське ТОВ "ЛАН"	50-100
	3792941	Agricultural LLC "Nyva"	Сільськогосподарське ТОВ "Нива"	more than 100
	3793484	Agricultural Company "Svitanok"	Сільськогосподарське ТОВ "Світанок"	more than 100
	36746367	"Make Agro" LLC	ТОВ "Мейк Агро"	50-100
	3793583	Agricultural LLC "Pridniprovske"	Сільськогосподарське ТОВ "Придніпровське"	50-100
	3793515	Bogodukhovske Agricultural LLC	Сільськогосподарське ТОВ "Богодухівське"	50-100
Chernihiv	3794785	Private agricultural enterprise "Piskivske"	Приватне сільськогосподарське підприємство "Пісківське"	more than 100
	2078868	"Rozhnivka-Agro" LLC	ТОВ "Рожнівка-Агро"	more than 100
	24842666	Branch "Krasnosilska Dairy Farm" of Agricultural Company "Nadiya"	Філія "Молочно-товарна ферма "Красносільська" Сільськогосподарського Тов "Надія"	more than 100
	3798725	Agricultural LLC "Vira"	Сільськогосподарське ТОВ "Віра"	more than 100
	30875436	Batktivshchyna Agricultural LLC	Сільськогосподарське ТОВ "Батківщина"	more than 100
	30481568	Mena-Avangard LLC	ТОВ "Мена-Авангард"	more than 100
	3794704	Private Agricultural Enterprise "Avangard"	Приватне Сільськогосподарське Підприємство "Авангард"	more than 100
	21401849	Farming enterprise "Victoria"	Селянське (Фермерське) Господарство "Вікторія"	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	3794897	"Shevchenko Agro Firm" LLC	ТОВ "Агрофірма імені Шевченка"	more than 100
	34593914	Niva 2008 LLC	ТОВ "Нива 2008"	more than 100

Key obstacles observed in the sector

While identifying main obstacles for the development of milk production in 7 Central Ukrainian regions under investigation 44 companies were contacted, of which 34 (77%) agreed to participate in the survey, and 10 (23%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

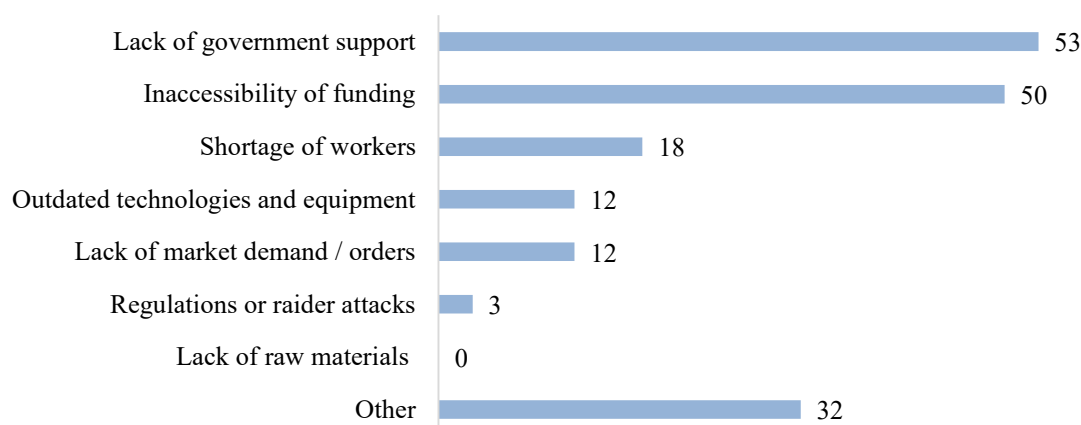


Fig. 2.43. The rating of main obstacles for the development of milk production in 7 Central Ukrainian regions under investigation, %

The Ukrainian milk production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (53%), inaccessibility of funding (50%) and shortage of workers (18%).

The main problem that went beyond the survey for both dairy farmers and everyone involved in the agro-sector is the expectation of opening the land market.

The sector stalled in standby mode. Some farmers are very concerned, others are ready for change, but all are trying to find financing to secure their own land.

The lack of affordable financing is mostly mentioned by small and medium-sized milk producers with a dairy herd of up to 50-100 heads. These producers, because of the ineffective system of agri-subsidies, actually do not receive financial assistance from the government; therefore, having high cost of loans, they lack financial opportunities to buy productive dairy herd and modern equipment.

The way out is a creation of dairy cooperatives by such producers, which, through consolidation, will be able to receive financing from Western banks with better terms, will formulate

complex orders for milking equipment and breed herds, and will form large batches of commodity milk at a higher price, and so on.

Nowadays there is a shortage of high-quality premium milk, and an increase in its production requires investments in dairy herds and milking equipment.

On the other hand, the dominance of palm oil and its active use in the food industry for the sake of reducing the production costs adversely affects both processors and milk producers.

The shortage of workers is due to high competition from employers in Poland (labour migration), as well as seasonal agribusinesses (vegetable growing, horticulture, etc.). The solution is development of efficient milk production, with a higher level of wages.

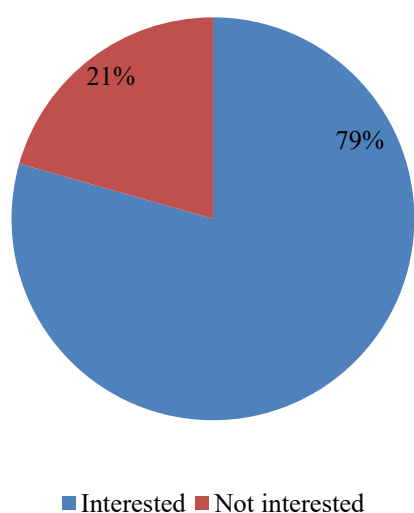


Fig. 2.44. The interest of milk production enterprises in cooperation with the Dutch business

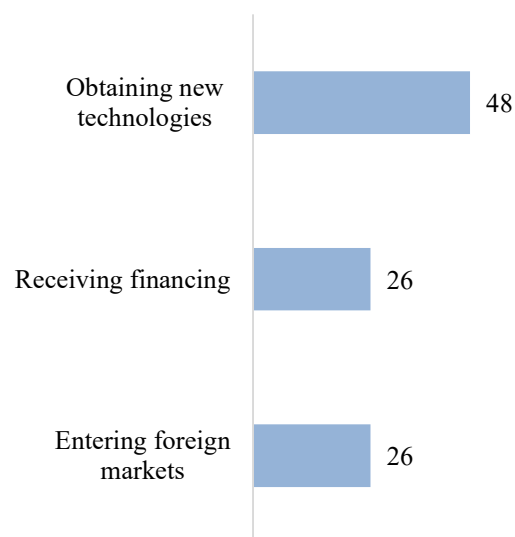


Fig. 2.45. Main areas of potential cooperation with the Dutch business in milk production, %

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 79% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (48%), receiving financing (26%) and entering foreign markets (26%).

SWOT analysis of the sector

<p>S (strengths)</p> <ul style="list-style-type: none"> – Favourable climatic conditions; – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement 	<p>W (weaknesses)</p> <ul style="list-style-type: none"> – Negative trend in cattle stock reduction; – Weak government support for milk producers; – Dominance of artificial milk substitutes (palm oil, etc.), which reduce the demand and price of milk as raw materials; – Shortage of equipment to preserve milk and maintain its high quality; – Low number of high-tech farms
<p>O (opportunities)</p> <ul style="list-style-type: none"> – Opening of the land market (reducing the risk of lease termination); – Opportunities to export of dairy products to the growing Asian markets will increase demand and prices for raw milk; – Possible land market opening, which will simplify land issues when creating dairy farms with their pastures 	<p>T (threats)</p> <ul style="list-style-type: none"> – Further cattle stock reduction; – Labour migration; – Delaying the timing of land market opening; – Dumped imports from Europe

2.5. Processing of milk

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 224 enterprises processing milk, of which 123 are legal entities (55%), and 101 - individual entrepreneurs (about 45%).

The largest number of companies operates in the Vinnytsia region (54 units or 24%), and the least - in Kirovohrad region (14 units or 6%).

The sector is employing 22 108 full-time employees, including 21 793 in legal entities (99%), and 315 are employed by individual entrepreneurs (about 1%). The sector's leader by the number of employees is Vinnytsia region (6 738 people or 31%), while the smallest employment in the sector is in Kirovohrad region (1 100 people or 5%).

Table 2.26. Number of functioning enterprises and employment in milk processing in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	10	14	24	2 698	55	2 753
Chernihiv	16	10	26	1 660	23	1 683
Khmelnyskiy	15	10	25	2 628	28	2 656
Kirovohrad	9	5	14	1 089	11	1 100
Kyiv	31	17	48	3 333	69	3 402
Vinnytsia	22	32	54	6 663	75	6 738
Zhytomyr	20	13	33	3 722	54	3 776
Total	123	101	224	21 793	315	22 108

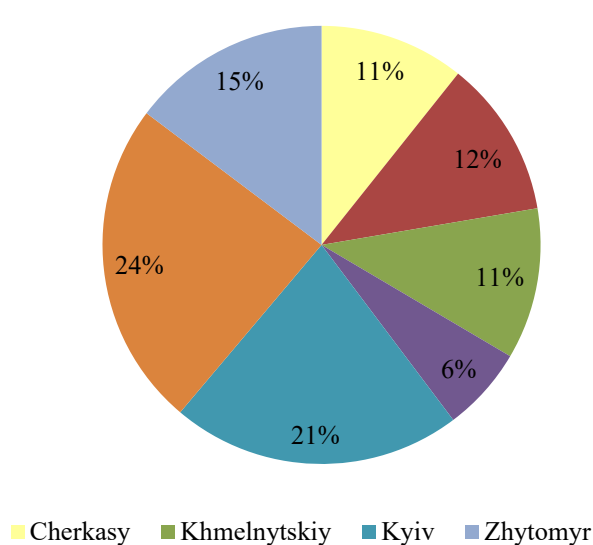


Fig. 2.46. Breakdown of milk processing enterprises by regions

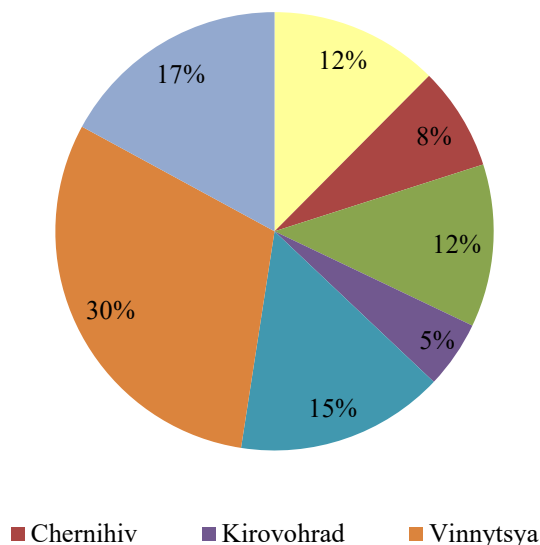


Fig. 2.47. Regional employment structure in milk processing

Sales

In 2018, sales volume of dairy products enterprises amounted to about UAH 27 454 million, of which UAH 27 404 million were generated by legal entities (almost 100%), and the rest UAH 50 million – by individual entrepreneurs (about 0.2%).

In the regional structure, the leaders are Vinnytsia region (UAH 8 859 million or 32% of sales), Zhytomyr region (UAH 4 942 million or 18%) and Kyiv region (UAH 4 728 million or 17%). Together, these regions account for 67% of dairy products sales among 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in dairy products production is about 45%.

Table 2.27. The volume of sales of milk processing enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	3 738.7	6.3	3 745.0
Chernihiv	2 445.3	3.8	2 449.1
Khmelnyskiy	1 863.6	3.3	1 866.9
Kirovohrad	862.0	3.1	865.1
Kyiv	4 712.2	15.6	4 727.9
Vinnytsia	8 845.5	13.1	8 858.7
Zhytomyr	4 936.8	5.0	4 941.8
Total	27 404.2	50.2	27 454.4

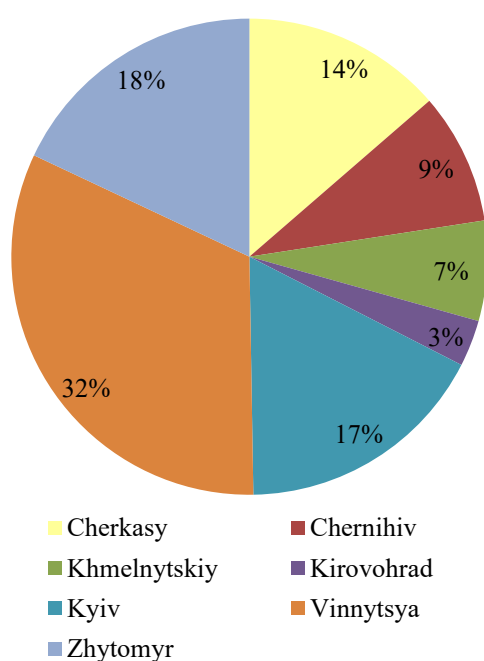


Fig. 2.48. Regional sales of dairy products

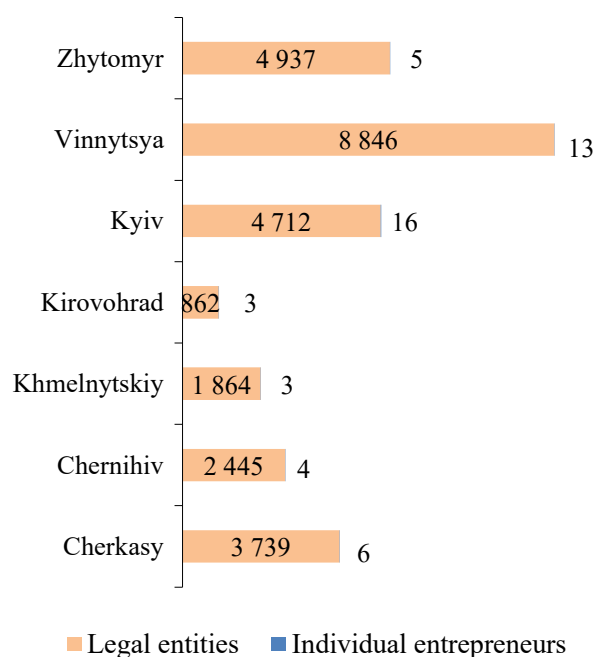


Fig. 2.49. Regional sales of dairy products by type of business entity, mln. UAH

Dairy and cheese making products sales dominate in the commodity structure of sales (89% of total sales of the sector). Zhytomyr region is a leader in the ice cream production (76% of total sales) and Vinnytsia region –other dairies and cheese making production (36%).

Table 2.28. Sales of production of dairy products in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Manufacture of ice cream	2.1	1.0	0.2	693.0	14.8	0.0	2 209.5	2 920.7
Operation of dairies and cheese making	3 742.9	2 448.2	1 866.7	172.1	4 713.0	8 858.7	2 732.2	24 533.7
TOTAL	3 745.0	2 449.1	1 866.9	865.1	4 727.9	8 858.7	4 941.8	27 454.4

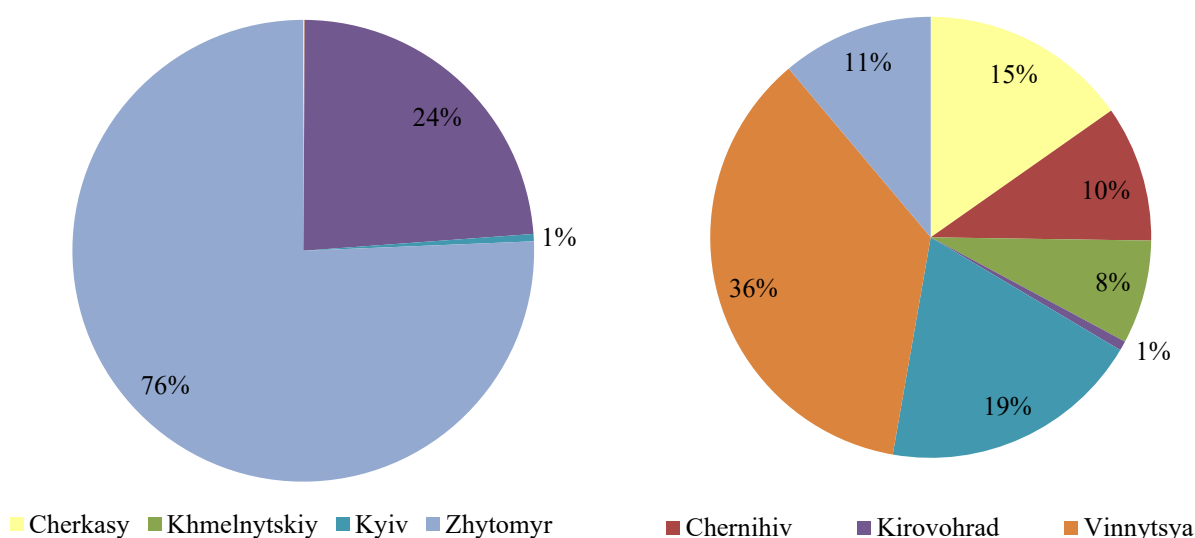


Fig. 2.50. Regional sales of ice cream

Fig. 2.51. Regional sales of dairy and cheese making products

Production

Production volumes of the main types of dairy products in the studied regions in 2018 are shown in the Table 2.29.

7 Central Ukrainian regions under investigation account for most of the production of basic dairy products in Ukraine: 58% of milk and cream, 42% of curdled milk and cream, yogurt, butter milk, sour cream and other fermented products and 46% of grated, powdered, blue-veined and other non-processed cheese. Kyiv and Vinnytsia regions occupies the dominant position in milk processing.

Table 2.29. Production volumes of main types of dairy products in 2018, thsd. tons

Region	Milk and cream not concentrated	Grated, powdered, blue-veined and other non-processed cheese	Curdled milk and cream, yogurt, butter milk, sour cream and other fermented products
Cherkasy	14.7	14.6	14.6
Chernihiv	9.9	6.8	2.8
Khmelnyskiy	11.6	3.8	3.7
Kirovohrad	1.5	0.3	2.0
Kyiv	123.2	3.6	73.3
Vinnytsia	90.0	10.6	13.5
Zhytomyr	37.1	5.3	4.2
Total 7 regions	288.0	45.0	114.1
Total production in Ukraine	496.7	97.0	274.5
Share of 7 regions in Ukraine production	58%	46%	42%

Source: State Statistics Service of Ukraine

Export

In 2018, the volume of dairy products export in 7 Central Ukrainian regions under investigation amounted to about USD 119.3 million, of which almost 52% was generated by Vinnytsia region (USD 62.1 million).

Main foreign sales markets are Moldova (15%), Morocco (7%) and China (6%).

Table 2.30. The volume of dairy products export in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnyskiy	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Butter	1 349	5 841	6 519		9 274	27 248	6 369	56 599
Milk and cream, concentrated or containing added sugar	985	9 148	3 678		114	18 402	5 259	37 585
Milk and cream, not concentrated nor containing added sugar	0				21	8 807	2	8 830
Whey	3 295		129		0	4 136		7 560
Cheese and curd	1 457	879	1 792		228	2 789	26	7 171
Buttermilk, curdled milk and cream, yogurt	0		763		21	690	33	1 506
TOTAL	7 085	15 868	12 881		9 657	62 071	11 689	119 251

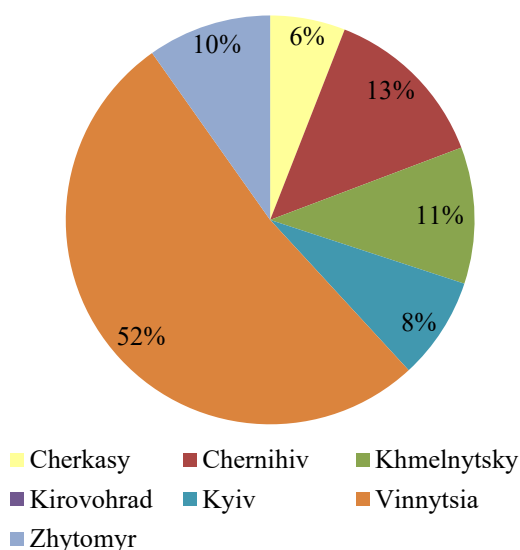


Fig. 2.52. Regional breakdown of dairy products export

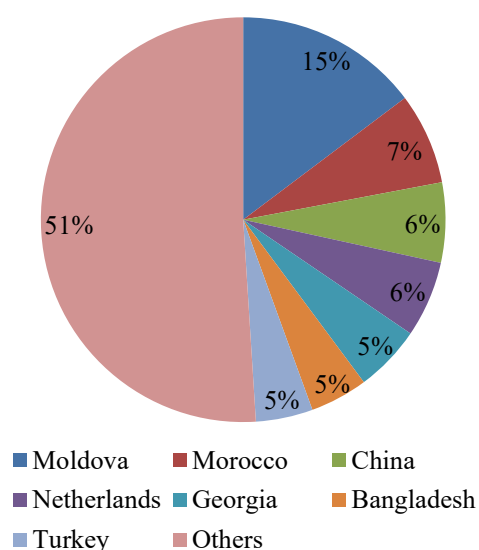


Fig. 2.53. Dairy products exports by destinations

Leading companies of the sector

The main milk processing companies in 7 Central Ukrainian regions under investigation are Food Development LLC, “Yagotinsky Butter Plant” ALC and Lustdorf Company LLC.

Table 2.31. Leading milk processing companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	more than 100
446003	“Yagotinsky creamery” ALC	ТДВ “Яготинський маслозавод”	more than 100
23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	more than 100
182863	ПАТ “Житомирський маслозавод”	PJSC “Zhytomyr Butter Plant”	more than 100
418018	PJSC “Vinnytsia dairy plant” Roshen “	ПрАТ “Вінницький молочний завод “Рошен”	more than 100
447853	JSC “Yuriya”	ПрАТ “Юрія”	more than 100
31952591	Subsidiary enterprise “Starokostiantyniv Dairy Plant”	Дочірнє підприємство “Старокостянтинівський молочний завод”	more than 100
447824	“Zolotonosha butter factory” ALC	ТДВ “Золотоніський маслоробний комбінат”	more than 100
30873067	ТОВ “Андрушівський маслосирзавод”	LLC “Andrushivsky Creamery”	more than 100
447818	PJSC “Zvenygorodka Cheese Making Plant”	ПрАТ “Звенигородський сироробний комбінат”	more than 100

Regional distribution of the largest companies in the sector is shown in Table 2.32.

Table 2.32. Top-10 milk processing companies by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	40395732	Food Development LLC	ТОВ “Фуд Девелопмент”	more than 100
	23063575	Lustdorf Company LLC	ТОВ Фірма “Люстдорф”	more than 100
	418018	PJSC “Vinnytsia dairy plant” Roshen “	ПрАТ “Вінницький молочний завод “Рошен”	more than 100
	424444	“Lityn dairy plant” LLC	ТОВ “Літинський молочний завод”	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	38030199	Khmilnyk Factory of Powdered Skim Milk "Milk Visit" LLC	ТОВ "Хмільницький Завод Сухого Знежиреного Молока "Молочний Візит"	more than 100
	34309918	"Gaysyn Dairy Factory" LLC	ТОВ "Гайсинський Молокозавод"	more than 100
	40327290	Business Forward LLC	ТОВ "Бізнес Форвард"	50-100
	444582	"Yampil Maslosyrzavod" LLC	ТОВ "Ямпільський Маслосирзавод"	50-100
	32010376	Shpykivsky Dairy Consumer Society	Споживче Товариство "Шпиківський Молокозавод"	50-100
	35346395	Private Enterprise "Eco-Molproduct"	Приватне Підприємство "Еко-Молпродукт"	50-100
Kyiv	446003	"Yagotinsky creamery" ALC	ТДВ "Яготинський маслозавод"	more than 100
	445937	PJSC Wimm-Bill-Dann Ukraine	ПрАТ "Вімм-Білл-Данн Україна"	more than 100
	445914	Obukhov Dairy Factory JSC	ПрАТ "Обухівський Молочний Завод"	more than 100
	445794	JSC "ZhLK-Ukraine"	ПрАТ "ЖЛК-Україна"	more than 100
	445920	LLC "Pereyaslav-Molproduct"	ТОВ "Переяслав-Молпродукт"	more than 100
	38981517	Milk Line Dairy Company LLC	ТОВ "Молочна Компанія "Мілк Лайн"	more than 100
	445883	PJSC "Kagma"	ПрАТ "Кагма"	50-100
	33272217	Aldolat LLC	ТОВ "Алдолат"	50-100
	38010015	LLC "LVK-Milk"	ТОВ "ЛВК-Мілк"	50-100
	39585803	Happy Milk Plus LLC	ТОВ "Хеппі Мілк Плюс"	25-50
Khmelnyskiy	31952591	Subsidiary enterprise "Starokostiantyniv Dairy Plant"	Дочірнє підприємство "Старокостянтинівський молочний завод"	more than 100
	447729	Khmelnyskyi Maslosyrbaza PJSC	ПрАТ "Хмельницька Маслосирбаза"	more than 100
	37971230	Jivaldis Private Enterprise	Приватне підприємство "Дживальдіс"	more than 100
	14146210	PJSC "Derazhnyansky Dairy Factory"	ПрАТ "Деражнянський молочний завод"	more than 100
	447681	"Vinkovetsky Cheese Factory" LLC	ТОВ "Вінковецький Сирзавод"	more than 100
	36334993	Private Enterprise "Izyaslavmolproduct"	Приватне Підприємство "Ізяславмолпродукт"	more than 100
	447675	Dunayivtsi Butter Factory	ТДВ "Дунаєвецький Маслозавод"	50-100
	38192388	Private Enterprise "Chortkivmoloko"	Приватне Підприємство "Чортківмолоко"	less than 25
	39741984	"Kobulehuri-Ukraine" LLC	ТОВ "Кобулетурі-Україна"	less than 25
	39323502	"Diada D" LLC	ТОВ "Діада Д"	less than 25
Cherkasy	447853	JSC "Yuriya"	ПрАТ "Юрія"	more than 100
	447824	"Zolotonosha butter factory" ALC	ТДВ "Золотоніський маслоробний комбінат"	more than 100
	447818	PJSC "Zvenygorodka Cheese Making Plant"	ПрАТ "Звенигородський сироробний комбінат"	more than 100
	30284277	Private Enterprise "Imperial Plus"	Приватне Підприємство "Імперіал Плюс"	more than 100
	25212619	Syrorob LLC	ТОВ "Сиророб"	more than 100
	32585566	Avis-1 LLC	ТОВ "Авіс-1"	25-50
Zhytomyr	182863	PJSC "Zhytomyr Butter Plant"	ПАТ "Житомирський маслозавод"	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	30873067	“Andrushivsky Creamery” LLC	ТОВ “Андрушівський маслосирзавод”	more than 100
	31450478	Three Bears LLC	ТОВ “Три Ведмеді”	more than 100
	35694381	“Ryhalsk factory of milk powder” LLC	ТОВ “Рихальський завод сухого молока”	more than 100
	32282161	Renet Private Enterprise	Приватне підприємство “Ренет”	more than 100
	37107815	“Galiyiv butter factory” LLC	ТОВ “Галіївський маслозавод”	more than 100
	38107182	Organic Milk LLC	ТОВ “Органік мілк”	more than 100
	31318317	Baranivsky Dairy LLC	ТОВ “Баранівський молокозавод”	more than 100
	32549161	“Brusyliv butter factory” LLC	ТОВ “Брусилівський маслозавод”	50-100
	32233780	Subsidiary “Radomilk”	Дочірнє підприємство “Радомілк”	25-50
Kirovohrad	39503720	Enterprise of citizens association “Firm Laska” of Public organization “Association of support of domestic commodity producer”	Підприємство об’єднання громадян “Фірма Ласка” Громадської Організації “Асоціація підтримки вітчизняного товаровиробника”	more than 100
	40236151	“Svitlovodsk Butter and Cheese Factory” LLC	ТОВ “Світловодський Маслосирзавод”	more than 100
	35038106	Joint Ukrainian-Bulgarian Multiprofile LLC “NAK”	Спільне Українсько-Болгарське Багатопрофільне ТОВ “НАК”	less than 25
	24150945	LLC small enterprise “Mriya”	ТОВ мале підприємство “Мрія”	less than 25
	37969043	Svit-Syr LLC	ТОВ “Світ-Сир”	less than 25
	33455182	Corida-Service Private Enterprise	Приватне підприємство “Коріда-Сервіс”	less than 25
Chernihiv	381152	JSC “Ichnia Milk Canning Factory”	ПрАТ “Ічнянський молочно-консервний комбінат”	more than 100
	448077	PJSC “Novgorod-Siversky cheese factory”	ПрАТ “Новгород-Сіверський сирзавод”	more than 100
	41212435	LLC “Ichnia Dry Milk and Butter Factory”	ТОВ “Ічнянський завод сухого молока та масла”	more than 100
	5388983	JSC “Kulykiv milk”	ПрАТ “Куликівське молоко”	more than 100
	21403660	“Losynivsky butter and cheese factory” LLC	ТОВ “Лосинівський маслосирзавод”	more than 100
	30894726	Subsidiary enterprise “Koropsky cheese factory” LLC “SIL”	Дочірнє Підприємство “Коропський сирзавод” ТОВ “СИЛ”	50-100
	448031	PJSC “Ichnia Dry Milk and Butter Plant”	ПАТ “Ічнянський завод сухого молока та масла”	25-50
	36956295	“Sosnytsky cheese factory” LLC	ТОВ “Сосницький сирзавод”	25-50
	34210125	“Forest Fairy Tale Center Ukraine” LLC	ТОВ “Лісова Казка Центр Україна”	less than 25
	30647913	“Chernihiv butter and cheese factory” LLC	ТОВ “Чернігівська маслосирбаза”	less than 25

Key obstacles observed in the sector

While identifying main obstacles for the development of milk processing in 7 Central Ukrainian regions under investigation 14 companies were contacted, of which 9 (64%) agreed to participate in the survey, and 5 (36%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

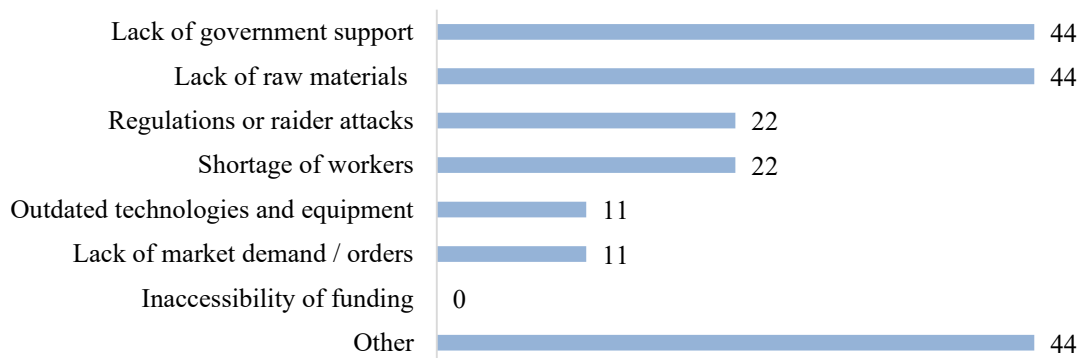


Fig. 2.54. The rating of main obstacles for the development of milk processing in 7 Central Ukrainian regions under investigation, %

The Ukrainian milk production and processing sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (44%), lack of raw materials (44%), regulations or raider attacks (22%) and shortage of workers (22%).

The lack of affordable financing is mostly mentioned by small and medium-sized milk producers. These producers, because of the ineffective system of agri-subsidies, actually do not receive financial assistance from the government; therefore, having high cost of loans, they lack financial opportunities to buy productive dairy herd and modern equipment.

The way out is a creation of dairy cooperatives by such producers, which, through consolidation, will be able to receive financing from Western banks with better terms, will formulate complex orders for milking equipment and breed herds, and will form large batches of commodity milk at a higher price, and so on.

After the introduction of Russia's embargo on Ukrainian dairy products (milk of the 2nd grade was used for their production) dairies are not in urgent need of 2nd grade milk. Now there is a shortage of high-quality premium milk, and an increase in its production requires investments in dairy herds and milking equipment.

The shortage of workers is due to high competition from employers in Poland (labour migration), as well as seasonal agribusinesses (vegetable growing, horticulture, etc.). The solution is development of efficient milk production, with a higher level of wages.

There is also the problem of low energy efficiency and the lack of sufficient funding to improve the environmental standards of milk production. Milk producers have also expressed their interest in getting Dutch dairy industry technologies. Some producers are ready to buy components for cheese production and/ or technology.

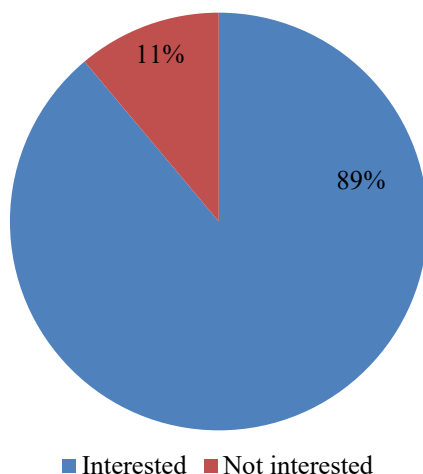


Fig. 2.55. The interest of milk processing enterprises in cooperation with the Dutch business

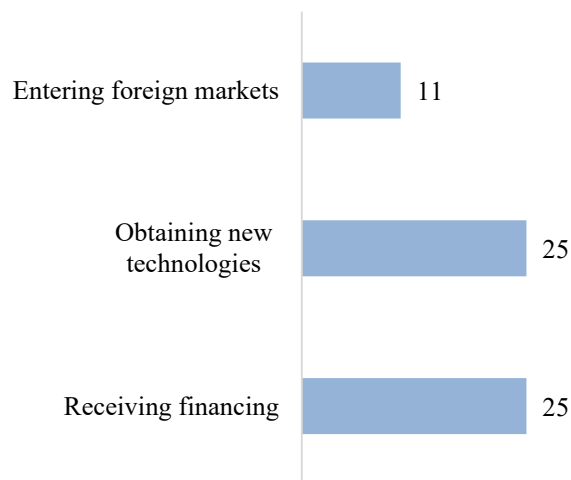


Fig. 2.56. Main areas of potential cooperation with the Dutch business in milk processing

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 89% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (38%), obtaining new technologies (25%) and receiving financing (25%).

SWOT analysis of the sector

S (strengths)	W (weaknesses)
<ul style="list-style-type: none"> – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement 	<ul style="list-style-type: none"> – Shortage of high quality raw milk; – Weak government support; – Shortage of high-tech equipment and production technologies; – Presence of fake products in the dairy market (palm oil and other artificial substitutes) – Dumped imports of dairy products
O (opportunities)	T (threats)
<ul style="list-style-type: none"> – More than 20 Ukrainian producers have been approved for export to the European Union of dairy products. This gives Ukrainian producers both access to the EU market and third-country markets (Middle East and Africa) 	<ul style="list-style-type: none"> – Increasing the shortage of milk for processing; – Labour migration; – Delaying the timing of land market opening; – Increasing of dumped imports

2.6. Processing and preserving of fruit and vegetables

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 133 enterprises producing and processing fruit and vegetables, of which 79 are legal entities (59%), and 54 - individual entrepreneurs (about 41%).

The largest number of companies operates in Vinnytsia region (37 units or 28%), and the least - in Zhytomyr region (6 units or 4%).

The sector is employing 3 686 full-time employees, including 3 127 in legal entities (89%), and 421 are employed by individual entrepreneurs (about 11%). The sector's leader by the number of employees is Vinnytsia region (2 001 people or almost 54%), while the smallest employment in the sector is in Chernihiv region (28 people or 1%).

Table 2.33. Number of functioning enterprises and employment in processing and preserving of fruit and vegetables in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	17	7	24	553	66	619
Chernihiv	6	1	7	25	3	28
Khmelnyskiy	8	6	14	33	163	196
Kirovohrad	4	6	10	78	0	78
Kyiv	22	13	35	695	34	729
Vinnytsia	20	17	37	1 846	155	2 001
Zhytomyr	2	4	6	35	0	35
Total	79	54	133	3 265	421	3 686

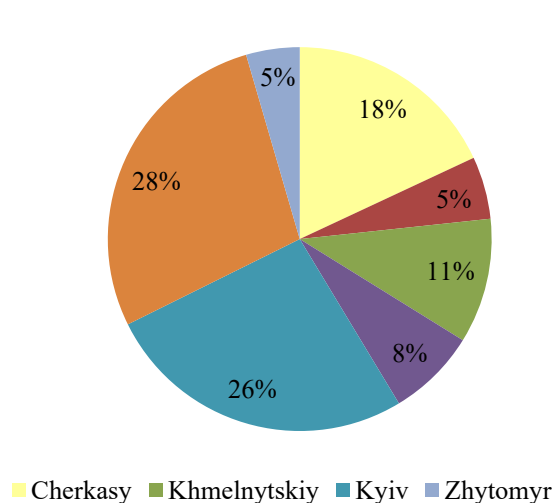


Fig. 2.57. Breakdown of processing and preserving of fruit and vegetables enterprises by regions

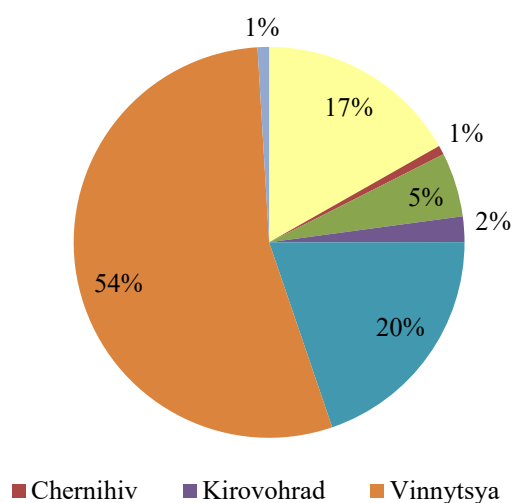


Fig. 2.58. Regional employment structure in processing and preserving of fruit and vegetables

In terms of sub-sectors, the largest number of enterprises operates in other processing and preserving of fruit and vegetables (81%), and the smallest - in the processing and preserving of potatoes (4%).

Table 2.34. Number of functioning processing and preserving of fruit and vegetable enterprises by regions and subsectors

Regions	Manufacture of fruit and vegetable juice	Other processing and preserving of fruit and vegetables	Processing and preserving of potatoes	Total
Cherkasy	2	22	0	24
Chernihiv	1	5	1	7
Khmelnyskiy	2	12		14
Kirovohrad		9	1	10
Kyiv	5	29	1	35
Vinnytsia	10	25	2	37
Zhytomyr		6		6
Total	20	108	5	133

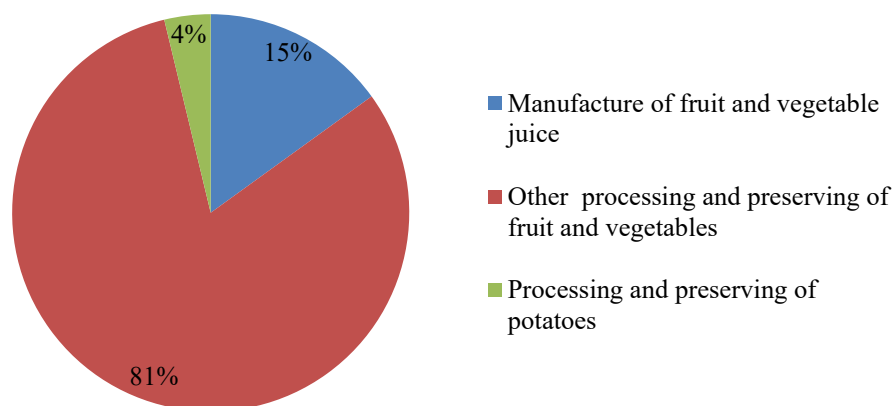


Fig. 2.59. Breakdown of processing and preserving of fruit and vegetables enterprises by subsectors

Sales

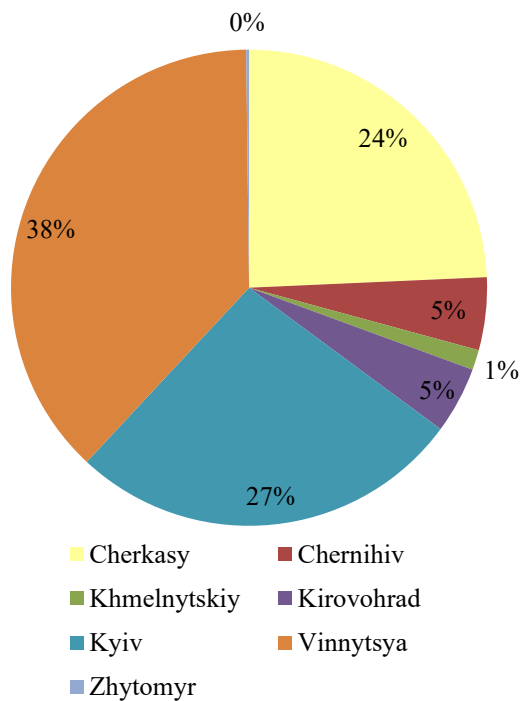
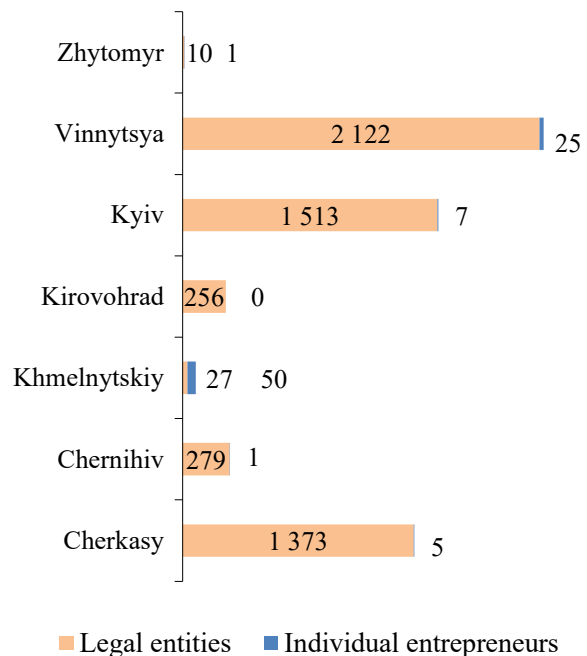
In 2018, sales volume of fruit and vegetable processing enterprises amounted to about UAH 5 669 million, of which UAH 5 581 million were generated by legal entities (more than 98%), and the rest UAH 88 million – by individual entrepreneurs (about 2%).

In the regional structure, the leaders are Vinnytsia region (UAH 2 147 million or 38% of sales), Kyiv region (UAH 1 520 million or 27%) and Cherkasy region (UAH 1 377 million or 24%). Together, these regions account for more than 89% of processed fruit and vegetable sales among 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in processing and preserving of fruit and vegetables is about 19%.

Table 2.35. The volume of sales of processing and preserving of fruit and vegetable enterprises in 2018, mln. UAH

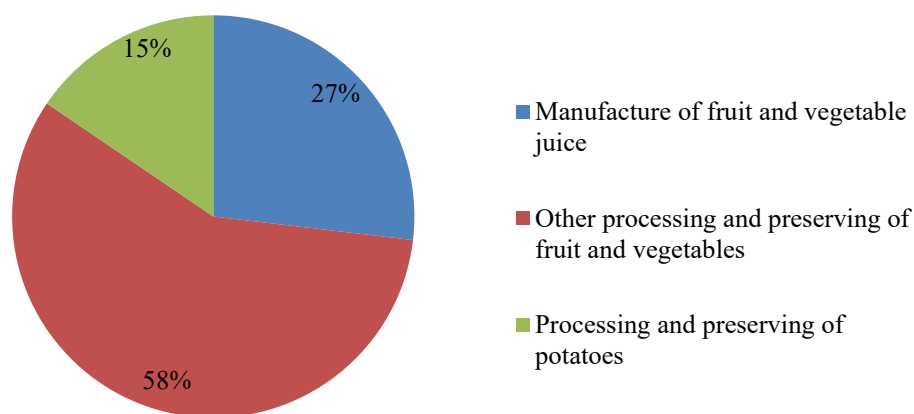
Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	1 372.5	4.8	1 377.3
Chernihiv	279.1	0.7	279.8
Khmelnyskiy	27.3	50.2	77.5
Kirovohrad	256.5	0.0	256.5
Kyiv	1 513.5	6.9	1 520.4
Vinnitsya	2 122.0	24.7	2 146.8
Zhytomyr	9.9	1.1	11.0
Total	5 580.8	88.4	5 669.3

**Fig. 2.60. Regional sales of processing and preserving of fruit and vegetables sector****Fig. 2.61. Regional sales of processing and preserving of fruit and vegetables sector by type of business entity, mln. UAH**

In the commodity structure of sales, the sales of processed fruit and vegetables (except juices and potatoes) dominate (58% of total sales of the sector). Manufacture of fruit and vegetable juice prevails in Vinnitsya region (sales volume – 906 UAH million or 59%), other processing and preserving of fruit and vegetables dominates in Cherkasy region (UAH 1 312 million or 40%), and processing and preserving of potatoes – in Kyiv region (UAH 780 mln. or 89%).

Table 2.36. Sales of processing and preserving of fruit and vegetables in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Manufacture of fruit and vegetable juice	5.9	104.3	6.1	0.0	501.1	906.0	0.0	1 523.4
Other processing and preserving of fruit and vegetables	1 312.0	153.6	71.4	256.5	239.7	1 222.8	11.0	3 266.8
Processing and preserving of potatoes	59.4	21.9	0.0	0.0	779.7	18.0	0.0	879.0
Total	1 377.3	279.8	77.5	256.5	1 520.4	2 146.8	11.0	5 669.3

**Fig. 2.62. Sales of processing and preserving of fruit and vegetables by subsectors**

Export

In 2018, the volume of processed fruit and vegetables export in 7 Central Ukrainian regions under investigation amounted to about USD 80 million, of which almost 45% was generated by Vinnytsia region (USD 36.0 million) and 19% was generated by Cherkasy region (USD 15.3 million).

Main foreign sales markets are Austria (23%), Belarus (19%) and Poland (17%).

Table 2.37. The volume of export of the processed and preserved fruit and vegetables in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Frozen fruit and nuts	1 184	500	11 614		0	6 948	3 530	23 776
Fruit juices	1 174	15			180	18 229		19 597
Other nuts, fresh or dried, whether or not shelled or peeled	4 933		2 878	9	0	21	3 649	11 490
Fruits, nuts and other edible parts of plants, prepared or preserved	5	0		338	383	9 819	82	10 627
Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen	2 461	58		0	1 780			4 299
Frozen vegetables,	3 125	117	45	272		20	366	3 944

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid	2 143	3			1 500	6		3 653
Jams, fruit jellies, marmalades	167	8			203	726		1 104
Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid	3			24	495			523
Vegetables provisionally preserved, but unsuitable in that state for immediate consumption	36	306					12	354
Dried apricots, prunes, apples, peaches, pears,		15	58		6	127	13	218
Frozen vegetables prepared or preserved otherwise than by vinegar or acetic acid,		83			0	95	24	202
Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared	0		123		7	4		135
Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid	64				3		24	91
Fruit and nuts, provisionally preserved						30		30
Vegetables, fruit, nuts, fruit-peel and other edible parts of plants, preserved by sugar					1	5		6
Total	15 296	1 105	14 718	644	4 560	36 029	7 698	80 051

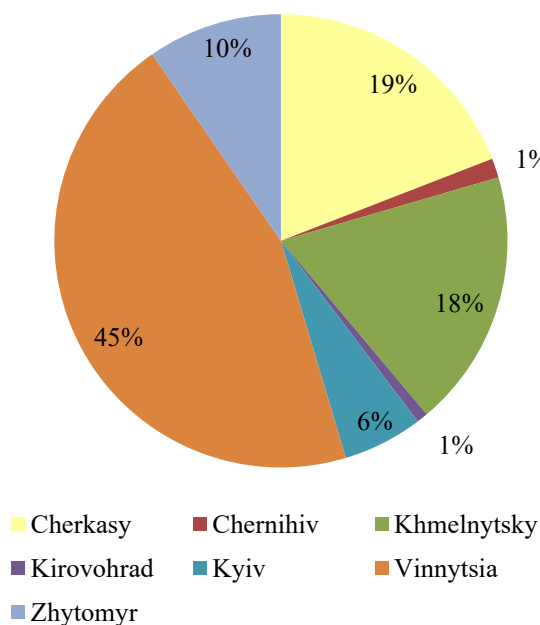


Fig. 2.63. Regional breakdown of processed and preserved fruit and vegetables exports

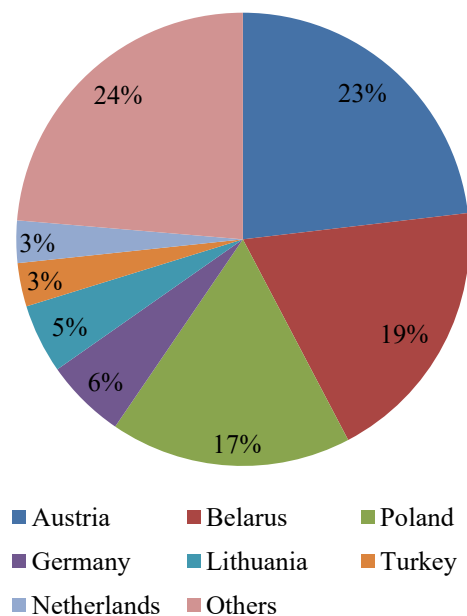


Fig. 2.64. Processed and preserved fruit and vegetables exports by destinations

Leading companies of the sector

The main companies processing and preserving fruit and vegetables in 7 Central Ukrainian regions under investigation are “Agrana Fruit Ukraine” LLC, Lux Chips LLC and Eco-Sphere LLC.

Table 2.38. Leading processing and preserving of fruit and vegetables companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
20118399	"Agrana Fruit Ukraine" LLC	ТОВ "Агрона Фрут Україна"	more than 100
36832644	Lux Chips LLC	ТОВ "Чіпси Люкс"	more than 100
32320552	Eco-Sphere LLC	ТОВ "Еко-Сфера"	more than 100
30425482	Pfanner Bar LLC	ТОВ "Пфаннер Бар"	more than 100
37695570	Austria Juice Ukraine LLC	ТОВ "Австрія Джус Україна"	more than 100
373965	PJSC "Mogyliv-Podilsky Canning Factory"	ПрАТ "Могилів-Подільський Консервний Завод"	more than 100
30453389	PJSC "Vinnytsia Food Processing Factory"	ПрАТ "Вінницька Харчосмакова Фабрика"	more than 100
32653955	Frau Marta PJSC	ПрАТ "Фрау Марта"	50-100
34856422	Farming enterprise "Chudova marka"	Фермерське господарство "Чудова Марка"	50-100
5528450	PJSC "Bilotserkivsky Canning Factory"	ПрАТ "Білоцерківський Консервний Завод"	50-100

Regional distribution of the largest companies in the sector are shown in Table 2.39.

Table 2.39. Top-10 companies of processing and preserving of fruit and vegetables by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	20118399	"Agrana Fruit Ukraine" LLC	ТОВ "Агрона Фрут Україна"	more than 100
	32320552	Eco-Sphere LLC	ТОВ "Еко-Сфера"	more than 100
	30425482	Pfanner Bar LLC	ТОВ "Пфаннер Бар"	more than 100
	37695570	Austria Juice Ukraine LLC	ТОВ "Австрія Джус Україна"	more than 100
	373965	PJSC "Mogyliv-Podilsky Canning Factory"	ПрАТ "Могилів-Подільський Консервний Завод"	more than 100
	30453389	PJSC "Vinnytsia Food Processing Factory"	ПрАТ "Вінницька Харчосмакова Фабрика"	more than 100
	38675597	Vinsnek LLC	ТОВ "Вінсек"	less than 25
	32833230	"Popovetsky canning factory" LLC	ТОВ "консервний завод "Поповецький"	less than 25
	40316631	"Fruktona-VN" LLC	ТОВ "Фруктона-ВН"	less than 25
	37159486	"Rosconcentrat" Ukraine LLC	ТОВ "Росконцентрат Україна"	less than 25
Kyiv	36832644	Lux Chips LLC	ТОВ "Чіпси Люкс"	more than 100
	34856422	Farming enterprise "Chudova marka"	Фермерське господарство "Чудова Марка"	50-100
	5528450	PJSC "Bilotserkivsky Canning Factory"	ПрАТ "Білоцерківський Консервний Завод"	50-100
	31429734	"Yabluko" LLC	ТОВ "Яблуко"	25-50
	39276175	"Ovocheva Skarbnytsia" LLC	ТОВ "Овочева Скарбниця"	25-50
	35422486	"Prodservice-Ir" LLC	ТОВ "Продсервіс-Ір"	less than 25
	33002544	"Contract Plus" LLC	ТОВ "Контракт Плюс"	less than 25
	31805862	"Olvin Plant" LLC	ТОВ "Завод "Олвін"	less than 25
	32754128	Agroholding LLC	ТОВ "Агрохолдинг"	less than 25
Khmelnyskiy	40509626	"Ovochevyy Svit" LLC	ТОВ "Овочевий Світ"	less than 25
	40202117	"Vitamin 2015" LLC	ТОВ "Вітамін 2015"	less than 25
	31418277	Private Enterprise "Evgeniya"	Приватне підприємство "Євгенія"	less than 25
	33930798	Farming Enterprise "Novyy Urozhay"	Фермерське господарство "Новий Урожай"	less than 25
	21332108	"Adams" ALC	ТДВ "Адамс"	less than 25
	21347587	"SPC Polymer" LLC	ТОВ НВП "Полімер"	less than 25

	32506950	“Agrofoods LTD”	ТОВ “Агрофудс ЛТД”	less than 25
	38447608	“ZS-Ltd-2” LLC	ТОВ “ЗС-ЛТД-2”	less than 25
	41629198	“Botanik Production and Food Company” LLC	ТОВ “Виробничо-продовольча компанія “Ботанік”	less than 25
	39888553	“Derazhnyansky Canning Plant” LLC	ТОВ “Деражнянський консервний завод”	less than 25
Cherkasy	32653955	Frau Marta PJSC	ПрАТ “Фрау Марта”	50-100
	40817035	“Smilyanska Chlodnya” Plant LLC	ТОВ “Завод Смілянська Хлоднє”	50-100
	35734429	“Dnieper Wave” LLC	ТОВ “Дніпрова Хвиля”	25-50
	35784883	“Shinkar Agro” LLC	ТОВ “Шинкар Агро”	less than 25
	34282645	“Moshuriv Cannery” LLC	ТОВ “Мошурівський консервний завод”	less than 25
	35546561	“Sirius-Agro” LLC	ТОВ “Сіріус-Агро”	less than 25
	40279001	“Industrial Enterprise” Uman “LLC	ТОВ “Виробниче Підприємство “Умань”	less than 25
	31963890	“Chygyryn Canning Plant” LLC	ТОВ “Чигиринський консервний завод”	less than 25
	37825596	Private Enterprise “Nik”	Приватне Підприємство “Нік”	less than 25
	1734626	Korsun-Shevchenkivky Cannery Plant of Cherkasy Regional Consumer Union	Корсунь-Шевченківський плодоконсервний завод Черкаської Облспоживспілки	less than 25
Zhytomyr	35063834	Champils Private Enterprise	Приватне підприємство “Шампілз “	less than 25
	31460308	Smolka Production and Commercial Firm LLC	ТОВ “Виробничо-комерційна Фірма “Смолка”	less than 25
	38085913	“Nemyrnyets Food Processing Plant” LLC	ТОВ “Немиринецький харчовий комбінат”	less than 25
	33476126	“Antey-2005” LLC	ТОВ “Антей-2005”	less than 25
Kirovohrad	39834487	Private Enterprise “Technopol”	Приватне підприємство “Технопол”	less than 25
	37324530	Agroprodsnek LLC	ТОВ “Агропродснек”	less than 25
	35046646	“Dobrovelychkivka Canning Factory Plus” LLC	ТОВ “Добровеличківський Консервний Завод Плюс”	less than 25
Chernihiv	32584274	Subsidiary company “Yumak” CJSC “Intergrossystem” Corporation	Дочірнє Підприємство “Юмак” ЗАТ “Корпорація “Інтерагросистема”	less than 25
	38189176	Private Enterprise “Bochonok”	Приватне підприємство “Бочонок”	less than 25

Key obstacles observed in the sector

While identifying main obstacles for the development of processing and preserving of fruit and vegetables enterprises in 7 Central Ukrainian regions under investigation 15 companies were contacted, of which 10 (67%) agreed to participate in the survey, and 5 (33%) refused. The following figure shows a rating of the obstacles as perceived by enterprises.

The Ukrainian fruit and vegetables production and processing sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: outdated technologies and equipment (50%), inaccessibility of funding (40%) and lack of raw materials (40%).

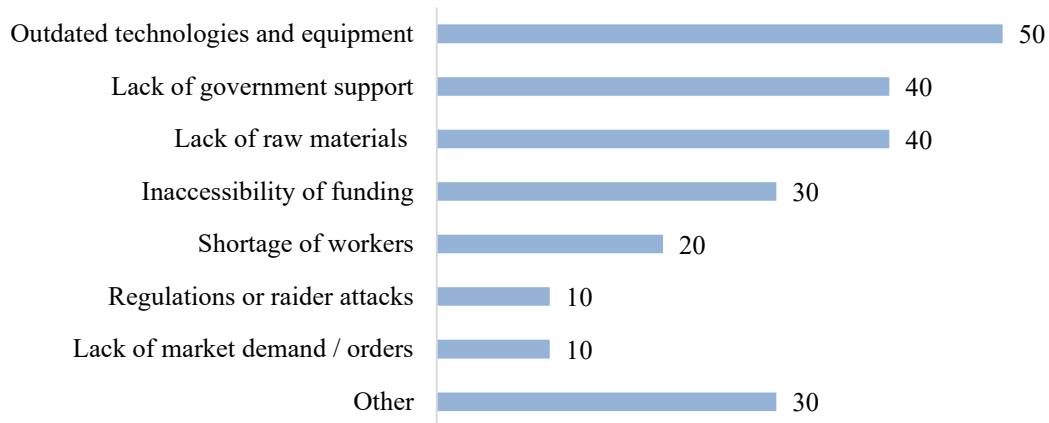


Fig. 2.65. Rating of main obstacles for the development of processing and preserving of fruit and vegetables enterprises in 7 Central Ukrainian regions under investigation, %

The inaccessibility of funding is ranked first in rating of Ukrainian fruit and vegetables processing industry challenges. Limited access to cheap credit resources (compared with neighbouring countries) which prevents the expansion of investment in assets and hinders the development of both horticulture and food processing. The lack of financial resources also prevents all necessary certifications, which, in turn, is a deterrent to the entry of Ukrainian companies into the EU market. A few large companies have adopted international quality standards (such as ISO 22000, HACCP). Smaller companies lack the implementation of such standards, due to lack of financing.

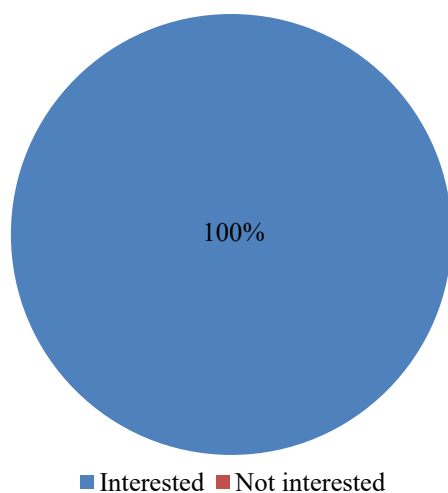


Fig. 2.66. The interest of processing and preserving of fruit and vegetables enterprises in cooperation with the Dutch business

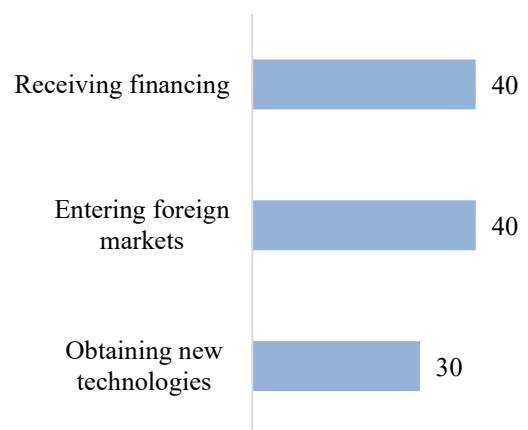


Fig. 2.67. Main areas of potential cooperation with the Dutch business in the processing and preserving of fruit and vegetables, %

Lack of government support is ranked second among challenges. Lack of state export promotion in fresh fruit and vegetable sectors. The sector is hardly supported by the government.

Lack of labour is ranked third among challenges. The problem includes a deficit of low-skilled workers.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, all surveyed companies express interest in cooperation with the Dutch companies, first of all in receiving financing (40%), entering foreign markets (40%) and obtaining new technologies (30%).

SWOT analysis of the sector

<p>S (strengths)</p> <ul style="list-style-type: none"> – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Long experience of deliveries to EU and American countries; – Well-educated and qualified specialists in fruit and vegetable processing; – Our own research base and in-depth collaboration with national research institutes 	<p>W (weaknesses)</p> <ul style="list-style-type: none"> – Low level of certification; – Low percentage of high-tech companies; – Slow application of contemporary technologies and slow modernization of the fixed assets; – Low availability of fruit and vegetable storage facilities; – Shortage of quality raw materials (diversion, damage during transportation); – Lack of capacity to freeze vegetables and fruits
<p>O (opportunities)</p> <ul style="list-style-type: none"> – Potential increase in domestic consumer demand; – Opportunities to increase production; – Opportunities to export to the growing Asian markets 	<p>T (threats)</p> <ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Delaying the timing of land market opening

3. Industrial Sectors. Detailed sectoral analysis

3.1. Industrial sectors

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 8 629 enterprises of industrial sectors studied, of which 1 639 are legal entities (almost 19%), and 6 990 - individual entrepreneurs (81%). The largest number of companies operates in the Kyiv region (2 253 units or 26%), and the least - in Kirovohrad region (513 units or 6%).

The sector provides work for 68 285 full-time employees, including 49 284 jobs at legal entities (72%), and 19 001 jobs created by individual entrepreneurs (about 28%). The sector's leader by the number of employees is Kyiv region (13 754 people or 20%), while the smallest employment in the sector is in Kirovohrad region (3 918 people or 6%).

Table 3.1. Number of enterprises and employment in industrial sectors studied in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	215	957	1 172	5 666	2 722	8 388
Chernihiv	169	666	835	6 642	1 519	8 161
Khmelnyskiy	267	1 464	1 731	8 916	4 768	13 684
Kirovohrad	96	417	513	2 854	1 064	3 918
Kyiv	536	1 717	2 253	9 661	4 093	13 754
Vinnysia	163	1 037	1 200	6 441	2 547	8 988
Zhytomyr	193	732	925	9 104	2 288	11 392
Total	1 639	6 990	8 629	49 284	19 001	68 285

Source: State Statistic Committee of Ukraine

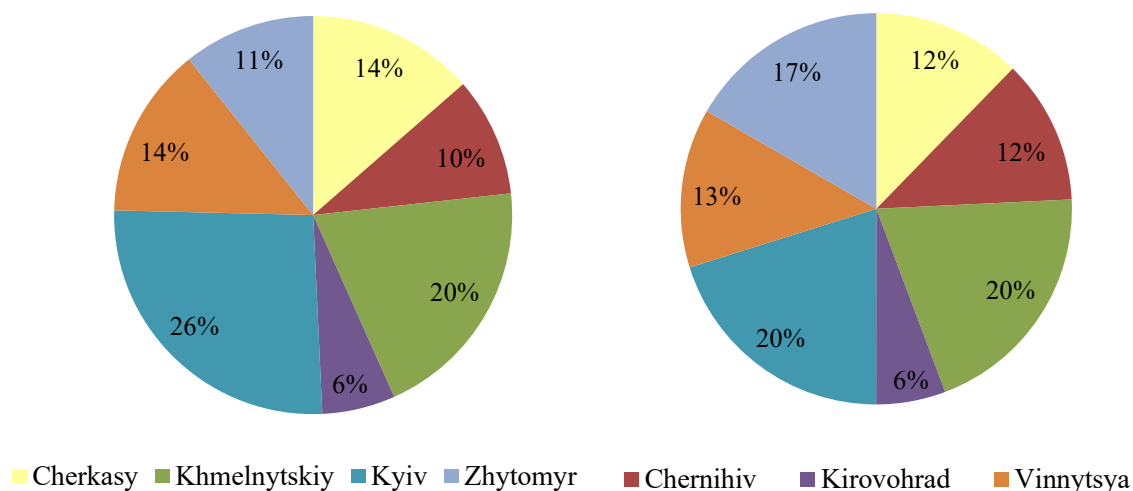


Fig. 3.1. Breakdown of industrial sectors studied enterprises by region

Fig. 3.2. Regional employment structure in industrial sectors studied

Sales

According to official statistics, in 2018 sales volume of industrial sectors studied enterprises totalled UAH 31 525 million, of which UAH 27 775 million were generated by legal entities (88%), and the rest UAH 3 750 million – by individual entrepreneurs (about 12%).

In the regional structure, the leaders are Kyiv region (UAH 10 753 million or 34% of sales), Zhytomyr region (UAH 5 044 million or 16%) and Khmelnytskiy region (UAH 4 123 million or 13%). Together, these regions account for more than 63% of industrial sectors studied sales among 7 Central Ukrainian regions under investigation.

Table 3.2. Sales of industrial sectors studied enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	2 737	514	3 252
Chernihiv	2 962	311	3 273
Khmelnyskiy	3 467	656	4 123
Kirovohrad	1 302	173	1 475
Kyiv	9 745	1 008	10 753
Vinnytsia	2 951	654	3 605
Zhytomyr	4 611	434	5 044
Total	27 775	3 750	31 525

Source: State Statistic Committee of Ukraine

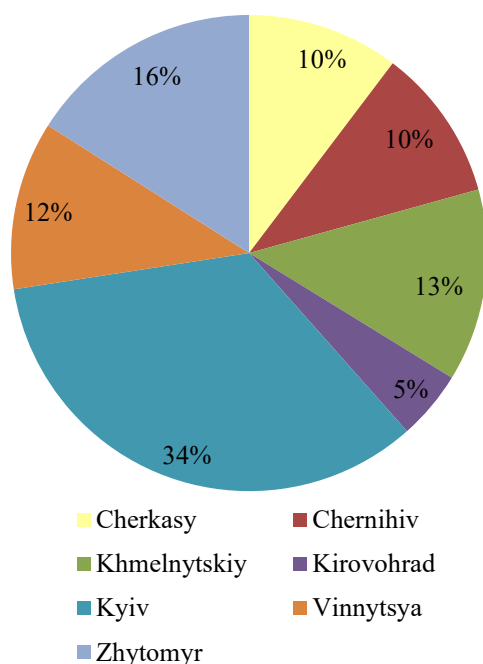


Fig. 3.3. Regional sales of industrial sectors studied products

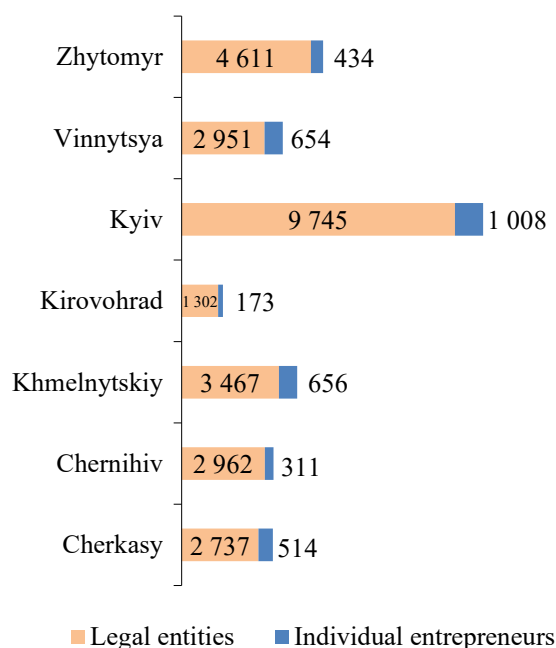


Fig. 3.4. Regional sales of industrial sectors studied products by type of business entity, mln. UAH

Metalworking products dominate in the commodity structure of sales (52% of total sales of the sectors). Furniture production prevails in Kyiv region (sales volume – UAH 2 212 million or 37% of subsector sales), metalworking production – in Kyiv region (UAH 6 947 million or 43%), and textiles production – in Zhytomyr region (UAH 2 256 million or 25%).

Table 3.3. Sales of industrial sectors studied in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Furniture production	909	203	1 143	732	2 212	485	336	6 021
Metalworking	1 209	1 529	1 086	498	6 947	2 622	2 453	16 344
Textile, clothing and footwear industry	1 134	1 541	1 893	245	1 594	497	2 256	9 159
Total	3 252	3 273	4 123	1 475	10 753	3 605	5 044	31 525

Source: State Statistic Committee of Ukraine

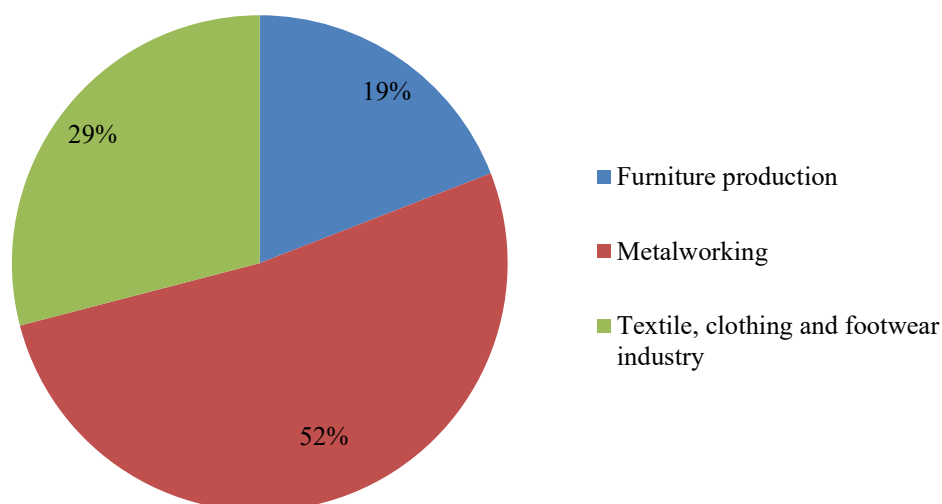


Fig. 3.5. Sales of industrial sectors studied by subsectors

Export

In 2018, the volume of industrial sectors studied exports in 7 Central Ukrainian regions under investigation amounted to USD 466.3 million, of which almost 29% was generated by sales of apparel (USD 133 million). Exported apparel is mainly products manufactured for famous international fashion brands on CMT terms.

In the regional structure of export, leaders are Zhytomyr region (USD 119.1 million or 26% of exports), Kyiv region (USD 103.5 million or 22%) and Khmelnytskyi region (USD 59.0 million or 13%).

Main foreign sales markets are Germany (26%), Romania (21%) and Poland (10%).

Table 3.4. The volume of export by the companies of the industrial sectors studied in 2018, thousand USD

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Men's or boys' suits, ensembles, jackets, blazers, trousers	6 382	276	4 605	29	1 415	10 629	37 819	61 154
Furniture and parts thereof	12 364	166	22 933	749	14 671	2 491	5 472	58 846
Parts of footwear		36 941	4		368	2	779	38 095
Structures and parts of structures, of iron or steel	157	18 211	347	674	4 138	91	1 284	24 903
Casks, drums, cans, boxes and similar containers	1				24 850	0		24 851
Table, kitchen or other household articles, and parts thereof, of iron or steel	78	7	28		1 236	442	20 376	22 166
Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts	2 537	4 987	2 188	2 178	1 775	2 980	2 855	19 500
Articles of iron or steel, n.e.s.	288	691	500	316	6 312	428	7 895	16 429
Women's or girls' overcoats, car coats, capes, cloaks, anoraks	493	3 109	53	2 632	3 397	2 801	538	13 022
Raw furskins	60				12 688		73	12 821
Carpets and other textile floor coverings			12 388			2		12 390
Men's or boys' overcoats, car coats, capes, cloaks, anoraks	635	531	843	90	310	9 738	126	12 273
Central heating boilers, non-electric	56	261	2 654		210	1 322	6 932	11 435
Sacks and bags, of a kind used for the packing of goods		2	0		185	6	10 414	10 608
Wire, rods, tubes, plates, electrodes and similar products, of base metal or of metal carbides					11	10 120		10 131
Gimped yarn, gimped strip		7 337		0	0	0	0	7 337
Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of leather		696	0	0	503		5 841	7 040
Saddlery and harness for any animal		1 203				8	5 513	6 724

Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts,	1 113	379	265	147	1 374	861	1 945	6 085
Synthetic filament yarn,		46	5 726		1	0	4	5 778
Seats, whether or not convertible into beds	2 216	152	73	274	1 247	772	123	4 856
Mattress supports	606	374	1	486	346	38	2 925	4 775
Woven fabrics of carded wool		4 645		0	13	35		4 693
Women's or girls' blouses, shirts and shirt-blouses	482		130	44	1 112	1 850	400	4 018
Other products	7 042	8 479	6 268	1 110	27 333	8 289	7 819	66 340
Total	34 508	88 493	59 006	8 729	103 496	52 904	119 132	466 269

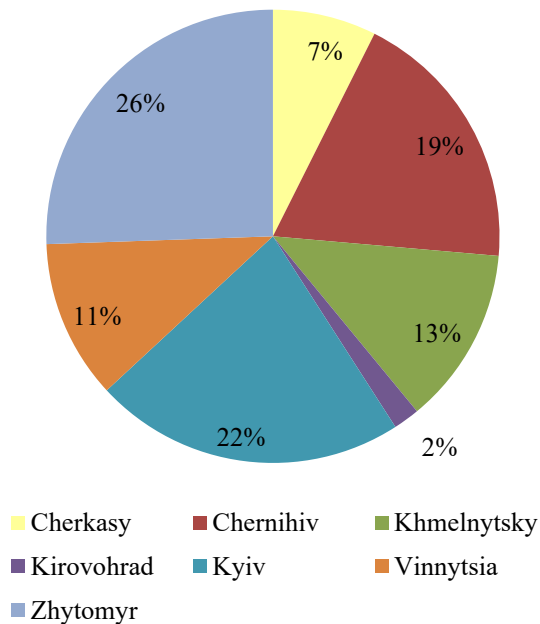


Fig. 3.6. Regional breakdown of industrial sectors studied export

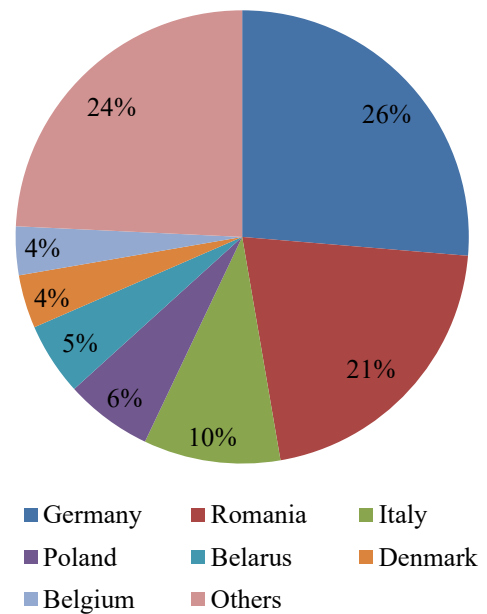


Fig. 3.7. Industrial sectors studied sectors export by destinations

Leading companies of the sector

Main industrial sectors companies in 4 Central Ukraine regions are “Ken-Pack (Ukraine)” LLC, PEK Energo LLC and Plasmatech PJSC.

Table 3.5. Leading industrial sectors studied companies

ID code	Company name (English)	Company name (Ukrainian)	Sector
32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	Metalworking
32976889	PEK Energo LLC	ТОВ “ПЕК Енерго”	Metalworking
3567397	Plasmatech PJSC	ПАТ “Плазматек”	Metalworking
32265502	Foreign enterprise Eurogold Industries Ltd.	Іноземне підприємство “Євроголд Індустріз ЛТД”	Metalworking
35234409	“Alutekh-K” LLC	ТОВ “Алютех-К”	Metalworking
35750435	T-Style LLC	ТОВ “Т-Стиль”	Textile, clothing and footwear industry
21328928	Karat LLC	ТОВ “Карат”	Textile, clothing and

ID code	Company name (English)	Company name (Ukrainian)	Sector
			footwear industry
33698667	LLC “Katerynoslav Furniture Workshops”	ТОВ “Катеринославські меблеві майстерні”	Furniture production
32065083	Aqua-Rodos LLC	ТОВ “Аква- Родос “	Furniture production
40848765	TMM-Energobud Management LLC	ТОВ “ТММ-Енергобуд Менеджмент”	Metalworking

Regional distribution of the largest companies in the sector is shown in Table 3.6.

Table 3.6. Top-10 companies of industrial sectors studied by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues, mln. UAH
Vinnytsia	32976889	PEK Energo LLC	ТОВ “ПЕК Енерго”	Metalworking	more than 100
	3567397	Plasmatech PJSC	ПАТ “Плазматек”	Metalworking	more than 100
	40764556	Anshar Trading House LLC	ТОВ “Торговий Дім “Аншар”	Furniture production	more than 100
	5502381	Volodarka PJSC	ПрАТ “Володарка”	Textile, clothing and footwear industry	more than 100
	14307570	PJSC “Bar Machine Building Plant”	ПрАТ “Барський машинобудівний завод”	Metalworking	more than 100
	13319677	Private Small Enterprise “Helika”	Приватне Мале підприємство “Геліка”	Furniture production	25-50
	308637	JSC “Khmilnyk Garment Factory” Lileya “	ПрАТ “Хмільницька Швейна Фабрика “Лілея”	Textile, clothing and footwear industry	25-50
	20105053	“Avesta” LLC	ТОВ “Авеста”	Metalworking	25-50
	31542592	Elit Company LLC	ТОВ -Компанія”Еліт”	Metalworking	25-50
	30807785	Kalina JSC	ПрАТ “Калина”	Textile, clothing and footwear industry	25-50
Kyiv	32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	Metalworking	more than 100
	35234409	“Alutekh-K” LLC	ТОВ “Алютех-К”	Metalworking	more than 100
	31387134	“Ukrug” LLC	ТОВ “Укрюг”	Furniture production	more than 100
	38286161	Grain House LLC	ТОВ “Зерновий Дім”	Metalworking	more than 100
	36086606	“Metal Galva Ukraine” LLC	ТОВ “Метало Гальва Україна”	Metalworking	more than 100
	39525917	“Art-Mark” LLC	ТОВ “Арт-Марк”	Metalworking	more than 100
	32167106	Pantek-Manufacturing LLC	ТОВ “Пантек-Виробництво”	Metalworking	more than 100
	38312505	“Ukrainian Furniture Holding Arnio” LLC	ТОВ “Український Меблевий Холдинг “Арніо”	Furniture production	more than 100
	35784726	Metkaspostach LLC	ТОВ “Меткаспостач”	Furniture production	more than 100
	212831	“Electronahrivach” ALC	ТДВ “Електронагрівач”	Furniture production	50-100
Khmelnyskiy	35750435	T-Style LLC	ТОВ “Т-Стиль”	Textile, clothing and footwear industry	more than 100
	21328928	Karat LLC	ТОВ “Карат”	Textile, clothing and footwear industry	more than 100
	32065083	Aqua-Rodos LLC	ТОВ “Аква- Родос “	Furniture production	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues, mln. UAH
	23841050	Commercial and Industrial Enterprise "Universal" LLC	ТОВ Торгово-Промислове підприємство "Універсал"	Textile, clothing and footwear industry	more than 100
	14307831	State Enterprise "Krasyliv Aggregate Plant"	Державне підприємство "Красилівський Агрегатний Завод"	Metalworking	more than 100
	21336490	Neil LLC	ТОВ "Нейл"	Metalworking	more than 100
	37083763	"Starokostiantyniv Furniture Factory" LLC	ТОВ "Старокостянтинівська меблева фабрика"	Furniture production	more than 100
	33317231	"Sanservice" LLC	ТОВ "Сансервіс"	Furniture production	more than 100
	30801338	Juventa LLC	ТОВ "Ювента"	Furniture production	more than 100
	34543250	Atmash Plant LLC	ТОВ "Завод "Атомаш"	Metalworking	50-100
Cherkasy	306851	PJSC "Cherkasy Silk Mill"	ПрАТ "Черкаський Шовковий комбінат"	Textile, clothing and footwear industry	more than 100
	3366434	PJSC "World of Furniture-Ukraine"	ПрАТ "Світ Меблів-Україна"	Furniture production	more than 100
	36584037	"Metal Invest" Company LLC	ТОВ "Компанія "Метал Інвест"	Metalworking	more than 100
	39457891	Veneto Group LLC	ТОВ "Група Венето"	Furniture production	more than 100
	25584960	Subsidiary "Khimik" of the PJSC "Azot"	Дочірнє підприємство "Хімік" Публічного Акціонерного Товариства "Азот"	Textile, clothing and footwear industry	more than 100
	33585132	Viva-Trade LLC	ТОВ "Віва-Трейд"	Textile, clothing and footwear industry	more than 100
	37106104	"MGK-Cherkasy" LLC	ТОВ "МГК-Черкаси"	Metalworking	more than 100
	14185003	Rost LLC	ТОВ "Рост"	Metalworking	more than 100
	3058052	Anva LLC	ТОВ "Анва"	Textile, clothing and footwear industry	50-100
	31100615	"Monastyrtsche Production and Implementation Firm "Energetik" LLC	ТОВ "Монастирищенська Виробничо-Впроваджувальна Фірма "Енергетик"	Metalworking	50-100
Zhytomyr	32265502	Foreign enterprise Eurogold Industries Ltd.	Іноземне підприємство "Євроголд Індустріз ЛТД"	Metalworking	more than 100
	20428705	LLC "Greif Flexibles Ukraine"	ТОВ "Грайф Флексіблс Україна"	Textile, clothing and footwear industry	more than 100
	1413394	PJSC "Zhytomyr Plant of Protective Structures"	ПрАТ "Житомирський завод огорожувальних конструкцій"	Metalworking	more than 100
	30853412	Atem-Frank Joint Ukrainian-German Enterprise	Спільне українсько-німецьке підприємство "Атем-Франк"	Metalworking	more than 100
	31030962	PJSC "Dniprowood"	ПрАТ "Дніпровуд"	Furniture production	more than 100
	36575373	Zhytomyrteplomash LLC	ТОВ "Житомиртепломаш"	Metalworking	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues, mln. UAH
	32579002	LLC "Redi Garm Technology Ukraine"	ТОВ "Реді Гармент Технолоджі Україна"	Textile, clothing and footwear industry	more than 100
	35299597	Krieger Boiler Plant LLC	ТОВ "Котлозавод "Крігер"	Metalworking	more than 100
	309097	JSC "Production and Commercial Firm" Lesya"	ПрАТ "Виробничо-Комерційна Фірма "Леся"	Textile, clothing and footwear industry	more than 100
	309105	PJSC "Berdychiv Clothing Factory"	ПрАТ "Бердичівська Фабрика Одягу"	Textile, clothing and footwear industry	more than 100
Kirovohrad	33698667	LLC "Katerynoslav Furniture Workshops"	ТОВ "Катеринославські мебелів майстерні"	Furniture production	more than 100
	5502700	JSC "Zoryanka" Garment Factory	ПрАТ "Швейна Фабрика "Зорянка"	Textile, clothing and footwear industry	50-100
	40945923	LLC "Svetlovodsk Metallic Structural Plant"	ТОВ "Світловодський Завод Металевих Конструкцій"	Metalworking	50-100
	34813572	LLC "Kirovohrad Instrumental Plant" LEZO "	ТОВ "Кіровоградський Інструментальний Завод "ЛЕЗО"	Metalworking	50-100
	13748444	Private Small Enterprise KIT Research and Production Company	Приватне мале підприємство Науково-Виробнича Фірма "КІТ"	Furniture production	50-100
	33254224	LLC "Ukrpromtara"	ТОВ "Укрпромтара"	Metalworking	25-50
	23685704	KIT-Consulting Scientific and Production Company Ltd.	Науково-Виробнича Фірма "КІТ-Консалтинг" ТОВ	Metalworking	25-50
	37503032	Eurostand-Group LLC	ТОВ "Євростенд-Груп"	Furniture production	25-50
	37540692	Ltd. "Davidos"	ТОВ "Давидос"	Furniture production	25-50
	3972867	Enterprise of the Citizens' Association "Kropyvnytskyi Educational and Production Enterprise of the Ukrainian Society of the Deaf"	Підприємство об'єднання громадян "Кропивницьке учбово-виробниче підприємство Українського товариства глухих"	Furniture production	25-50
Chernihiv	40848765	TMM-Energobud Management LLC	ТОВ "ТММ-Енергобуд Менеджмент"	Metalworking	more than 100
	32946641	Novofil LLC	ТОВ "Новофіл"	Textile, clothing and footwear industry	more than 100
	33167561	Alitoni LLC	ТОВ "Алітоні"	Textile, clothing and footwear industry	more than 100
	39076229	Sivertex LLC	ТОВ "Сівертекс"	Textile, clothing and footwear industry	more than 100
	33586107	Chernihiv Blacksmith Plant LLC	ТОВ "Чернігівський Ковальський Завод"	Metalworking	more than 100
	14251734	PJSC "Chekil Worsted and Cloth Company"	ПрАТ "Камвольно-Суконна Компанія "Чексіл"	Textile, clothing and footwear industry	more than 100
	14307297	State Enterprise	Державне підприємство	Metalworking	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues, mln. UAH
		Progress Research and Production Complex	Науково-Виробничий Комплекс “Прогрес”		
	31679506	Ostratex LLC	ТОВ “Остратекс”	Textile, clothing and footwear industry	50-100
	39791716	Inspetsprom Ltd.	ТОВ “Інспекпром”	Metalworking	50-100
	5502634	PJSC “Chernihiv Garment Factory” Elegant “	ПрАТ “Чернігівська швейна фабрика “Елегант”	Textile, clothing and footwear industry	50-100

Key obstacles observed in the sector

While identifying main obstacles for the development of industrial sectors studied in 7 Central Ukrainian regions under investigation 381 companies were contacted, of which 302 (79%) agreed to participate in the survey, and 79 (21%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

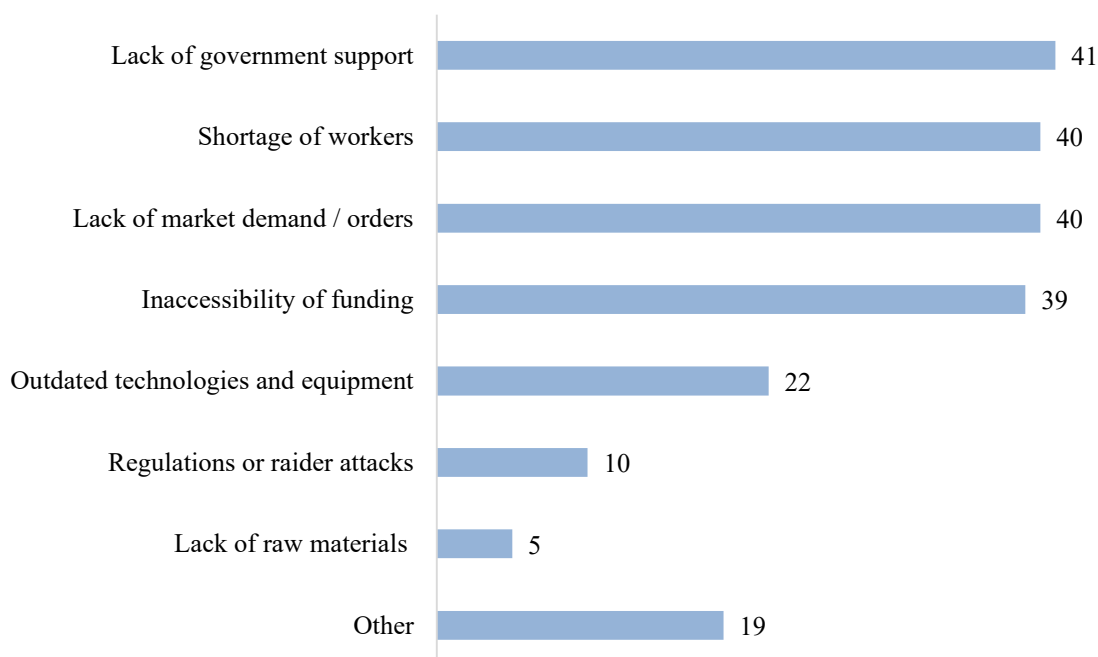


Fig. 3.8. The rating of main obstacles for the development of industrial sectors studied in 7 Central Ukrainian regions under investigation, %

The studied industrial sectors face some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (41%), shortage of workers (40%) and lack of market demand (40%).

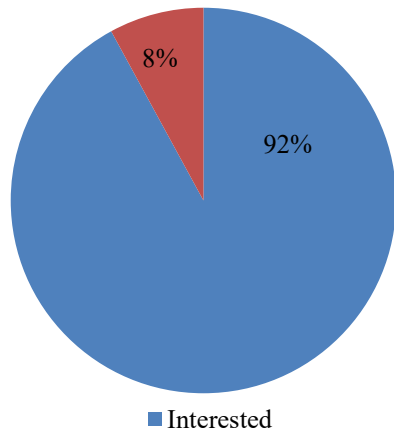


Fig. 3.9. The interest of industrial sectors studied enterprises in cooperation with the Dutch business

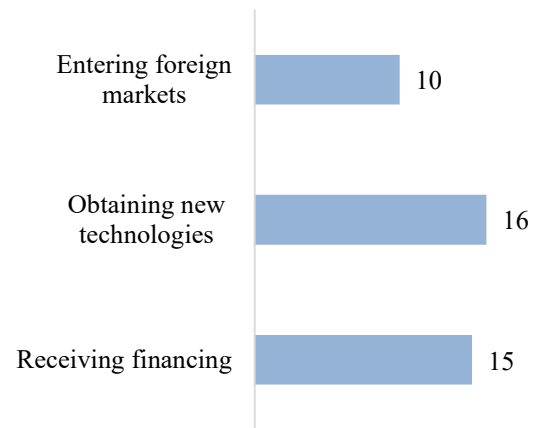


Fig. 3.10. Main areas of potential cooperation with the Dutch business in the industrial sectors studied

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 92% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (71%), obtaining new technologies (16%) and receiving financing (15%).

3.2. Textile, clothing and footwear industry

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 3 700 enterprises producing textile, clothing and footwear, of which 623 are legal entities (almost 17%), and 3,077 - individual entrepreneurs (83%).

The largest number of companies operates in the Khmelnytskyi region (1 086 units or 29%), and the least - in Kirovohrad region (227 units or 6%).

The sector provides work for 31,984 full-time employees, including 22,362 jobs at legal entities (70%), and 9 622 jobs created by individual entrepreneurs (about 30%). The sector's leader by the number of employees is Khmelnytskyi region (8 742 people or 27%), while the smallest employment in the sector is in Kirovohrad region (1 353 people or 4%).

It should be taken into account that official statistics does not cover a significant shadow segment of the industry mainly in the field of individual entrepreneurs using the simplified tax scheme. Problems arise because shadow producers do not have to present financial statements, and as a result, could not report the real wages they are paying their staff. Because of this, actual employment in the sector could be 3-4 times more than official figures.

Table 3.7. Number of functioning enterprises and employment in textile, clothing and footwear industry in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	82	348	430	2 290	1 100	3 390
Chernihiv	70	262	332	3 926	647	4 573
Khmelnytskyi	156	930	1 086	5 202	3 540	8 742
Kirovohrad	38	189	227	766	587	1 353
Kyiv	129	614	743	2 740	1 430	4 170
Vinnitsia	59	412	471	2 373	1 051	3 424
Zhytomyr	89	322	411	5 065	1 267	6 332
Total	623	3 077	3 700	22 362	9 622	31 984

Source: State Statistic Committee of Ukraine

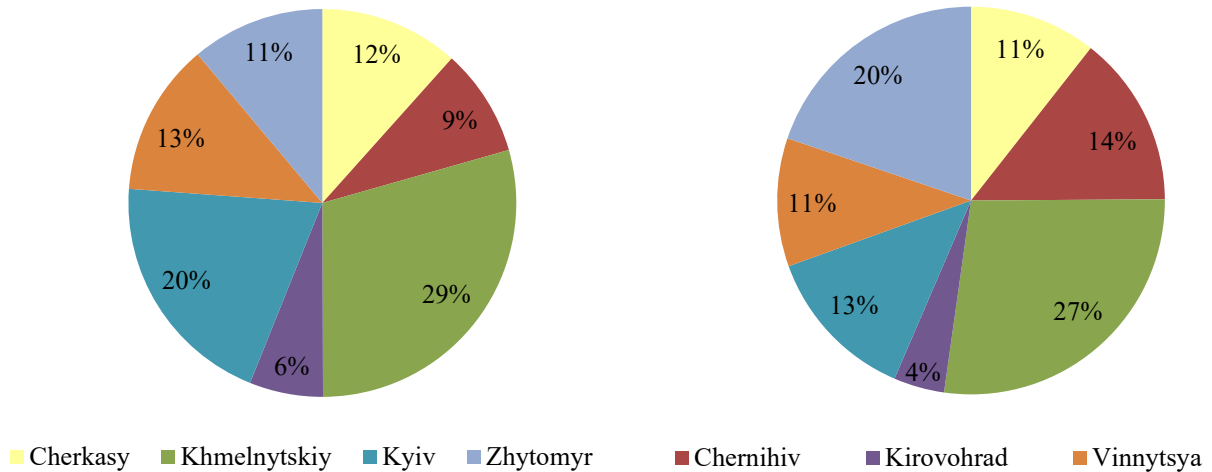


Fig. 3.11. Breakdown of textile, clothing and footwear industry enterprises by region

Fig. 3.12. Regional employment structure in textile, clothing and footwear industry

In terms of sub-sectors, the largest number of enterprises operates in the manufacture of wearing apparel (72%), and the smallest - in the manufacture of leather goods (11%).

Table 3.8. Number of functioning enterprises by regions and subsectors

Regions	Manufacture of leather and related products	Manufactur e of textiles	Manufacture of wearing apparel	Total
Cherkasy	43	64	323	430
Chernihiv	36	78	218	332
Khmelnyskiy	87	157	842	1086
Kirovohrad	19	24	184	227
Kyiv	138	173	432	743
Vinnitsya	38	69	364	471
Zhytomyr	83	66	262	411
Total	444	631	2625	3700

Source: State Statistic Committee of Ukraine

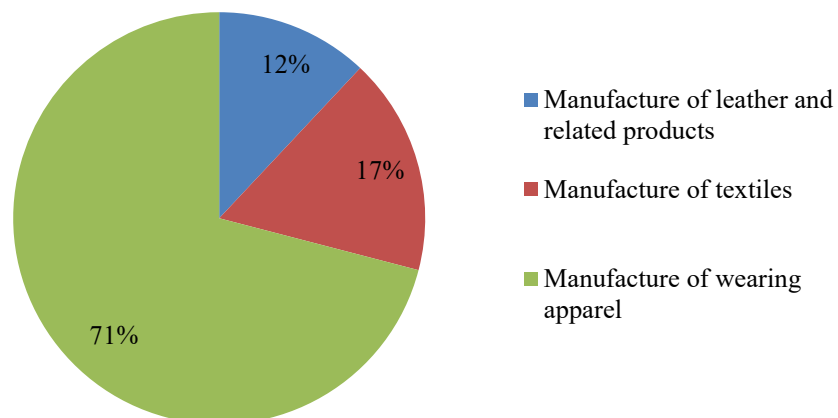


Fig. 3.13. Breakdown of textile, clothing and footwear industry enterprises by subsectors

Sales

According to official statistics, in 2018 sales volume of textile, clothing and footwear enterprises totalled UAH 9 159 million, of which UAH 7 867 million were generated by legal entities (86%), and the rest UAH 1 292 million – by individual entrepreneurs (about 14%).

In the regional structure, the leaders are Zhytomyr region (UAH 2 256 million or 25% of sales), Khmelnytskyi region (UAH 1 893 million or 21%) and Kyiv region (UAH 1 594 million or 17%). Together, these regions account for more than 63% of textile, clothing and footwear sales among 7 Central Ukrainian regions under investigation.

As it has been mentioned above, the official statistics can significantly underestimate the sales volume due to the presence of the shadow segment in the sector.

According to the results of companies' survey, the average level of sales through retail networks in textile, clothing and footwear production is about 33%.

Table 3.9. Sales of textile, clothing and footwear industry enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	986.2	147.4	1 133.7
Chernihiv	1 452.3	88.9	1 541.1
Khmelnytskyi	1 490.7	402.7	1 893.4
Kirovohrad	184.9	59.7	244.6
Kyiv	1 318.9	274.6	1 593.6
Vinnytsia	363.3	133.9	497.2
Zhytomyr	2 070.9	184.8	2 255.7
Total	7 867.3	1 292.0	9 159.3

Source: State Statistic Committee of Ukraine

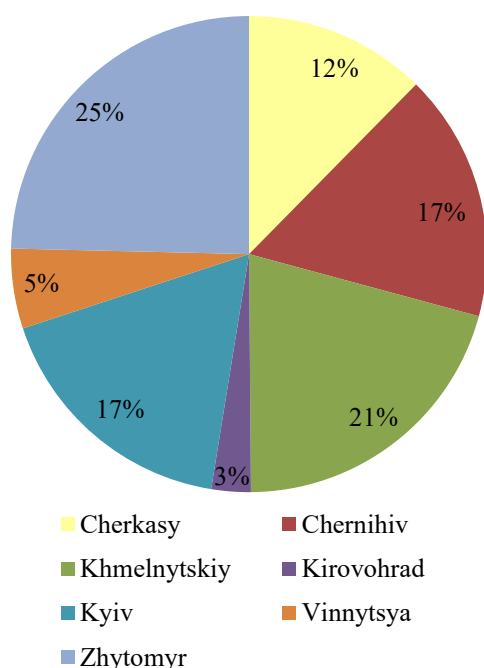


Fig. 3.14. Regional sales of textile, clothing and footwear industry products

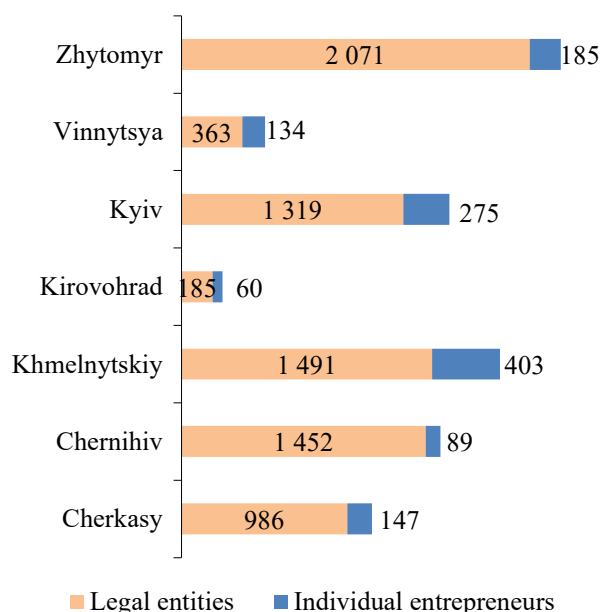


Fig. 3.15. Regional sales of textile, clothing and footwear industry products by type of business entity, mln. UAH

Wearing apparel products dominate in the commodity structure of sales (44% of total sales of the sector). In the segment of wearing apparel above 90% of production is on CMT basis. Leather and related products manufacturing prevails in Zhytomyr region (sales volume – UAH 787 million or 47% of subsector sales), wearing apparel production – in Khmelnytskyi region (UAH 913 million or 23%), and textiles production – in Khmelnytskyi region (UAH 794 million or 23%).

Table 3.10. Sales of textile, clothing and footwear industry in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Manufacture of leather and related products	39.2	357.1	186.0	23.5	277.9	13.0	787.0	1 683.7
Manufacture of textiles	624.2	662.8	794.3	57.1	496.5	33.9	763.0	3 431.7
Manufacture of wearing apparel	470.3	521.3	913.1	164.0	819.2	450.3	705.8	4 043.9
TOTAL	1 133.7	1 541.1	1 893.4	244.6	1 593.6	497.2	2 255.7	9 159.3

Source: State Statistic Committee of Ukraine

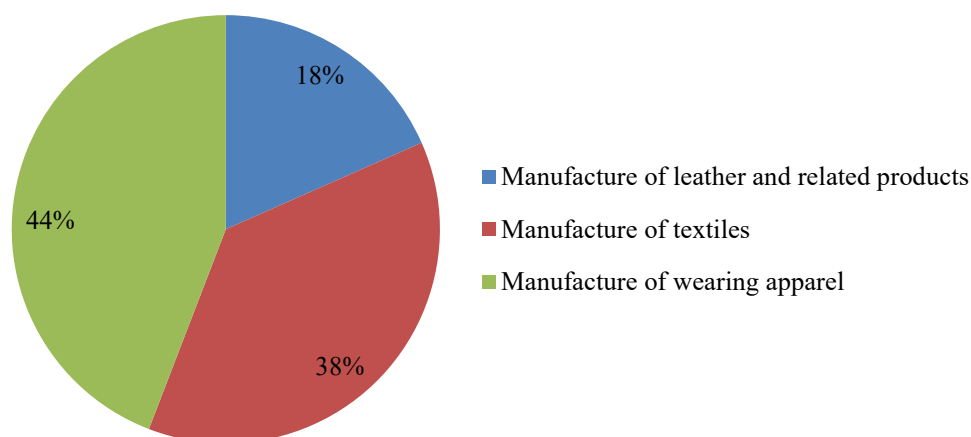


Fig. 3.16. Sales of textile, clothing and footwear industry by subsectors

Export

In 2018, the volume of textile, clothing and footwear exports in 7 Central Ukrainian regions under investigation amounted to USD 264.2 million, of which almost 27% was generated by sales of men's and women's suits, ensembles, jackets, blazers (USD 80.1 million). Exported apparel is mainly products manufactured for famous international fashion brands on CMT terms.

In the regional structure of export, leaders are Zhytomyr region (USD 72.1 million or 27% of exports), Chernihiv region (USD 67.0 million or 25%) and Kyiv region (USD 39.6 million or 15%).

Main foreign sales markets are Germany (26%), Romania (21%) and Italy (10%).

Table 3.11. The volume of export by the companies of the textile, clothing and footwear industry in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts	6 382	276	4 605	29	1 415	10 629	37 819	61 154
Parts of footwear		36 941	4		368	2	779	38 095
Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts	2 537	4 987	2 188	2 178	1 775	2 980	2 855	19 500
Women's or girls' overcoats, car coats, capes, cloaks, anoraks	493	3 109	53	2 632	3 397	2 801	538	13 022
Raw furskins	60				12 688		73	12 821
Carpets and other textile floor coverings			12 388			2		12 390
Men's or boys' overcoats, car coats, capes, cloaks, anoraks	635	531	843	90	310	9 738	126	12 273
Sacks and bags		2	0		185	6	10 414	10 608
Gimped yarn, gimped strip		7 337		0	0	0	0	7 337
Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of leather		696	0	0	503		5 841	7 040
Saddlery and harness for any animal		1 203				8	5 513	6 724
Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts, knitted or crocheted	1 113	379	265	147	1 374	861	1 945	6 085
Synthetic filament yarn		46	5 726		1	0	4	5 778
Woven fabrics of carded wool or of carded fine animal hair		4 645		0	13	35		4 693
Women's or girls' blouses, shirts and shirt-blouses	482		130	44	1 112	1 850	400	4 018
T-shirts, singlets and other vests, knitted or crocheted	120	12	68	0	3 094	9	531	3 835
Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels, spectacle cases, binocular cases, camera cases, musical instrument cases, gun cases, holsters and similar containers	10	402	8	7	2 904	85	160	3 576
Tanned or crust hides and skins of bovine				64	1 444	783	674	2 966
Made-up articles of textile materials	347	583	150	0	1 009	125	594	2 808
Wadding of textile materials and articles thereof		2 571	53	0	95	10	1	2 730
Articles for interior furnishing, of all types of textile materials		4		0	28		1 971	2 002
Men's or boys' shirts	3	27	12		166	1 604		1 813
Women's or girls' overcoats, car coats, capes, cloaks,	353	159	15	353	268	647		1 795

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
anoraks								
Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted	136		21	1	1 469	5	115	1 747
Woven fabrics containing predominantly, but < 85% synthetic staple fibres by weight, other than those mixed principally or solely with cotton		1 574		2	2	51	19	1 648
Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	150	25	257	0	888	3	18	1 340
Hats and other headgear, knitted or crocheted, or made up from lace, felt or other textile fabric	34	180	898		207	0		1 320
Woven fabrics of cotton, containing predominantly, but < 85% cotton by weight, mixed principally or solely with man-made fibres and weighing > 200 g/mbi	1 147	10		1		87	6	1 250
Tracksuits, ski suits, swimwear and other garments, n.e.s.	358	73	320		420	37	5	1 214
Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts	0	38	84		41	893	14	1 071
Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, knitted or crocheted	0		153		879			1 032
Other products	513	1 166	2 189	38	3 519	1 344	1 731	10 502
Total	14 874	66 976	30 431	5 587	39 573	34 596	72 147	264 184

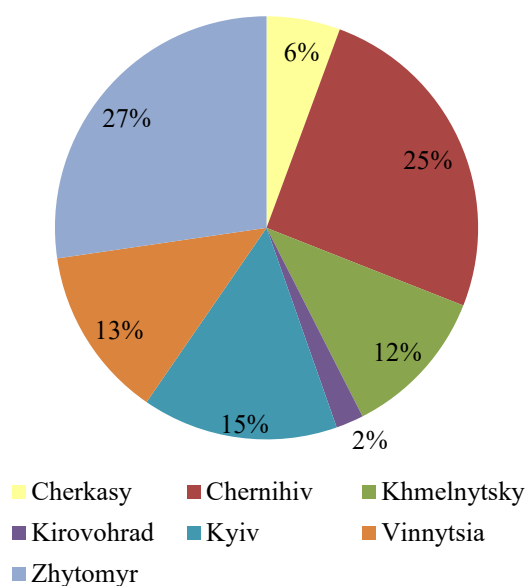


Fig. 3.17. Regional breakdown of textile, clothing and footwear industry export

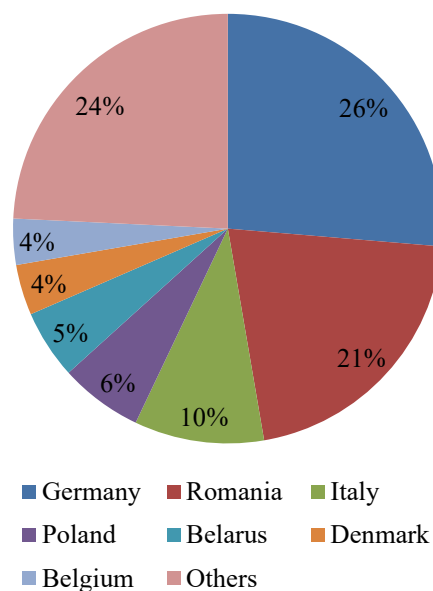


Fig. 3.18. Textile, clothing and footwear industry export by destinations

Leading companies of the sector

Main textile, clothing and footwear industry companies in Central Ukraine are T-Style LLC, Karat LLC and PJSC “Cherkasy Silk Mill”.

Table 3.12. Leading textile, clothing and footwear industry companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
35750435	T-Style LLC	ТОВ “Т-Стиль”	more than 100
21328928	Karat LLC	ТОВ “Карат”	more than 100
306851	PJSC “Cherkasy Silk Mill”	ПрАТ “Черкаський Шовковий комбінат”	more than 100
20428705	LLC “Greif Flexibles Ukraine”	ТОВ “Грайф Флексіблс Україна”	more than 100
23841050	Commercial and Industrial Enterprise “Universal” LLC	ТОВ Торгово-Промислове підприємство “Універсал”	more than 100
32946641	Novofil LLC	ТОВ “Новофіл”	more than 100
33167561	Alitoni LLC	ТОВ “Алітоні”	more than 100
25584960	Subsidiary “Khimik” of PJSC “Azot”	Дочірнє підприємство “Хімік” ПАТ “Азот”	more than 100
5502381	Volodarka PJSC	ПрАТ “Володарка”	more than 100
39076229	Sivertex LLC	ТОВ “Сівертекс”	more than 100

Regional distribution of the largest companies in the sector is shown in Table 3.13.

Table 3.13. Top-10 companies of textile, clothing and footwear industry by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	5502381	Volodarka PJSC	ПрАТ “Володарка”	more than 100
	308637	JSC “Khmelnyskyi Garment Factory” Lilya “	ПрАТ “Хмельницька Швейна Фабрика “Лілея”	25-50
	30807785	Kalina JSC	ПрАТ “Калина”	25-50
	5523197	“Veselka L” LLC	ТОВ “Веселка Л”	less than 25
	39109065	“Inter-Text” LLC	ТОВ “Інтер-Текст”	less than 25
	5502396	“Garment Factory Podillya “ALC	ТДВ “Швейна Фабрика “Поділля”	less than 25
	2941406	Vinnytsia Factory “Dynamo” - Enterprise based on the property of the sports society “Dynamo”	Вінницька Фабрика “Динамо” - Підприємство, засноване на власності фізкультурно-спортивного товариства “Динамо”	less than 25
	3972494	Vinnytsia Educational and Production Enterprise of the Ukrainian Society of the Deaf	Вінницьке учбово-виробниче підприємство Українського Товариства Глухих	less than 25
	37077110	“Omega-Trade-2010” LLC	ТОВ “Омега-Трейд-2010”	less than 25
	39035842	“E M S-Elegant” LLC	ТОВ “Е М С-Елегант”	less than 25
Kyiv	32393877	“Valteks” LLC	ТОВ “Валтекс”	50-100
	24915661	Foreign enterprise “Alteko”	Іноземне підприємство “Альтеко”	50-100
	37910953	K.Tex Ltd.	ТОВ “К.Текс”	50-100
	32545649	“Berezan Fabric Factory” LLC	ТОВ “Березанська Суконна Фабрика”	50-100
	5468558	Vyshneve Shoe Factory LLC	ТОВ “Вишнівська Взуттєва Фабрика”	25-50
	30726785	Eltex Corporation	Корпорація “Елтекс”	25-50
	31292488	“Glory” LLC	ТОВ “Слава”	25-50
	40542197	“April 1” LLC	ТОВ “1 Квітня”	25-50

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	34284250	Polymerspag LLC	ТОВ "Полімерспагат"	25-50
	35450859	"Vertical Metal Works" LLC	ТОВ "Завод Металовиробів "Вертикаль"	less than 25
Khmelnyskiy	35750435	T-Style LLC	ТОВ "Т-Стиль"	more than 100
	21328928	Karat LLC	ТОВ "Карат"	more than 100
	23841050	Commercial and Industrial Enterprise "Universal" LLC	ТОВ Торгово-Промислове підприємство "Універсал"	more than 100
	33591036	Aslan-Textile Private Enterprise	Приватне підприємство "Аслан-Текстиль"	50-100
	37462850	"Ukrintech Company" LLC	ТОВ "Компанія Укрінтек"	50-100
	34282341	"Ukrproplast" LLC	ТОВ "Укрпропласт"	50-100
	32039259	Bamby LLC	ТОВ "Бембі"	50-100
	39948114	Ukrshelter Private Enterprise	Приватне підприємство "Укршелтер"	25-50
	30064828	Litma LLC	ТОВ "Літма"	25-50
	39940691	Pollardy Fashion Group LLC	ТОВ "Полларді Фешн Груп"	25-50
Cherkasy	306851	PJSC "Cherkasy Silk Mill"	ПрАТ "Черкаський Шовковий комбінат"	more than 100
	25584960	Subsidiary "Khimik" of the PJSC "Azot"	Дочірнє підприємство "Хімік" Публічного Акціонерного Товариства "Азот"	more than 100
	33585132	Viva-Trade LLC	ТОВ "Віва-Трейд"	more than 100
	3058052	Anva LLC	ТОВ "Анва"	50-100
	5468044	Korsun-Shevchenkivsky Garment Factory LLC	ТОВ "Корсунь-Шевченківська Швейна Фабрика"	25-50
	35436001	Starkom-Inter LLC	ТОВ "Старком-Інтера"	less than 25
	38933526	Manege-Decor LLC	ТОВ "Манеж-Декор"	less than 25
	35377821	Private enterprise "Vlad-7"	Приватне підприємство "Влада-7"	less than 25
	31332957	Manezh LLC	ТОВ "Манеж"	less than 25
	32504272	Weisse-Style LLC	ТОВ "Вайсе-Стиль"	less than 25
Zhytomyr	20428705	"Greif Flexibles Ukraine" LLC	ТОВ "Грайф Флексіблс Україна"	more than 100
	32579002	"Ready Garment Technology Ukraine" LLC	ТОВ "Реді Гармент Технолоджі Україна"	more than 100
	309097	JSC "Production and Commercial Firm" Lesia "	ПрАТ "Виробничо-Комерційна Фірма "Леся"	more than 100
	309105	PJSC "Berdychiv Clothing Factory"	ПрАТ "Бердичівська Фабрика Одягу"	more than 100
	307230	JSC "Ecotextile"	ПрАТ "Екотекстиль"	50-100
	13548679	Tusmo LLC	ТОВ "Тусмо"	50-100
	32446629	Veles Leather Works LLC	ТОВ "Шкірзавод "Велес"	50-100
	33309435	"Ukrainian Industrial Company" Krok" LLC	ТОВ "Українська промислова компанія "Крок"	25-50
	36681876	"Gallery of Flax" LLC	ТОВ "Галерея Льону"	25-50
	31945231	Fashion Group LLC	ТОВ "Фешен Груп"	25-50
Kirovohrad	5502700	JSC "Zoryanka" Garment Factory	ПрАТ "Швейна Фабрика "Зорянка"	50-100
	36654528	Metservice Group LLC	ТОВ "Метсервісгруп"	25-50
	30513987	Private enterprise "Budkompleks"	Приватне підприємство "Будкомплекс"	less than 25
	41646702	"Corves" LLC	ТОВ "Корвес"	less than 25
	41250013	Build-Wicks LLC	ТОВ "Білд-Вікс"	less than 25
	2970613	"Garment Factory Ukraine" ALC	ТДВ "Швейна Фабрика "Україна"	less than 25
	39728398	"Mriya Ye" Sewing Production LLC	ТОВ "Швейне Виробництво "Мрія С"	less than 25

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	13770886	Kurtazh Company LLC	ТОВ Фірма "Куртаж"	less than 25
	31907641	Tau LLC	ТОВ "Тау"	less than 25
	41448465	"Pioni" LLC	ТОВ "Піоні"	less than 25
Chernihiv	32946641	Novofil LLC	ТОВ "Новофіл"	more than 100
	33167561	Alitoni LLC	ТОВ "Алітоні"	more than 100
	39076229	Sivertex LLC	ТОВ "Сівертекс"	more than 100
	14251734	PJSC "Cheksil"	ПрАТ "Камвольно-суконна компанія "Чексіл"	more than 100
	31679506	Ostratex LLC	ТОВ "Остратекс"	50-100
	5502634	PJSC "Chernihiv Garment Factory" Elegant"	ПрАТ "Чернігівська швейна фабрика "Елегант"	50-100
	310120	PJSC "Elita"	ПрАТ "Еліта"	50-100
	308376	PJSC "Chernihiv Shoe Factory" Bereginya "	ПрАТ "Чернігівська взуттєва фабрика "Берегиня"	25-50
	35821783	Private Enterprise "Semenivska Manufactora"	Приватне підприємство "Семенівська Мануфактура"	25-50
	34287203	Tozinali LLC	ТОВ "Тозіналі"	25-50

Key obstacles observed in the sector

While identifying main obstacles for the development of textile, clothing and footwear manufacturing in 7 Central Ukrainian regions under investigation 148 companies were contacted, of which 121 (82%) agreed to participate in the survey, and 27 (18%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

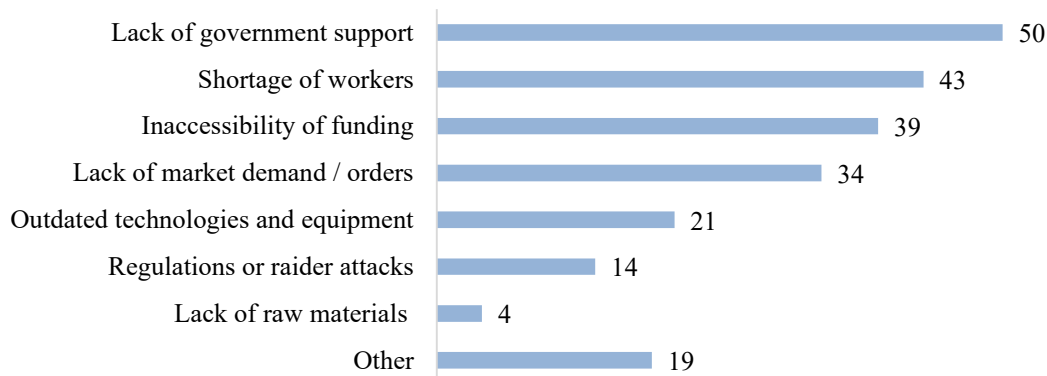


Fig. 3.19. The rating of main obstacles for the development of textile, clothing and footwear industry in 7 Central Ukrainian regions under investigation, %

The Ukrainian textile, apparel and footwear sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (50%), shortage of workers (43%) and inaccessibility of funding (39%).

For many companies, the lack of government support is a multifaceted problem. It includes the lack of loan programs for equipment modernization, insufficient preference system for domestic (Ukrainian) producers, non-transparent tenders, insufficient export promotion and unequal conditions compared to informal sector firms. Sector companies believe that the government should

implement a more effective policy to remove “shadow” semi-legal business (as result they avoid taxes). Companies working legally (paying all taxes) difficulty compete with “shadow” businesses. Also, a common problem is the volatility of the national currency, which complicates the signing of long-term contracts.

For small and medium enterprises, the sufficient obstacle is that mainly large enterprises are invited to international exhibitions and fairs. Since potential partners are looking for opportunities to place large orders. At the same time, we have good examples when Ukrainian SMEs used their mobility and flexibility to quickly adapt to changing demand or sew small batches of experimental clothing. The advantage of companies is the logistic capabilities that allow quick delivery of products to consumers.

Textile, apparel and footwear companies experience difficulties with recruiting staff. The situation is compounded by the migration of the working-age population to EU countries.

The textile industry has a bad reputation among young workers due to low wages, which often depends on seasonality. Many Ukrainians seek non-industrial employment. Salary is seen as poor, with little opportunity for advancement. The minimum wage required to maintain qualified seamstresses is about 10.000-12.000 UAH (about €300) per month. Salary could be lower for a number of reasons, but the main problem is relatively low productivity. Any measures that improve productivity will enable factories to pay their staff more.

The main issue with financing appears to be two-fold. Bank interest rates at 22% are too high for the apparel and footwear sector, where margins are rarely above 20%. The other problem is access to finance for small businesses. In many cases they do not have detailed financial records, especially if they are using the Simplified Taxation system and cannot put up guarantees for loans. Today, companies received the opportunity of financial support from international donors for the modernization and technological equipment.

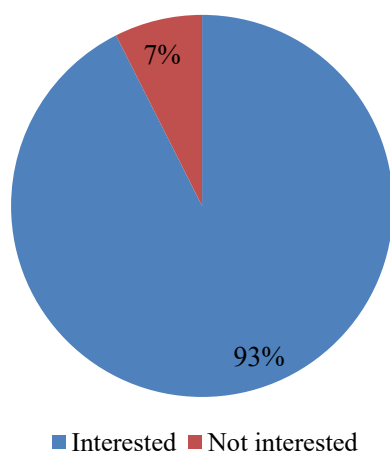


Fig. 3.20. The interest of textile, clothing and footwear industry enterprises in cooperation with the Dutch business

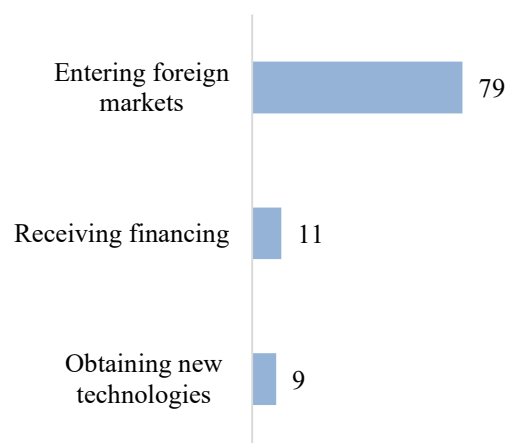


Fig. 3.21. Main areas of potential cooperation with the Dutch business in the textile, clothing and footwear industry

Among other problems mentioned by market participants during the visits to the factories are: low demand for domestic product, limited domestic fabric, leather and accessories production, outdated technologies and equipment, low domestic purchasing power, low popularity of Ukrainian brands and the lack of understanding and access to international markets.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 93% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (79%), receiving financing (11%) and obtaining new technologies (9%).

SWOT analysis of the sector

<p>S (strengths):</p> <ul style="list-style-type: none"> – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Well-educated staff; – Education institutions for the training of professional personnel; – Availability of equipment and experience of fulfilment of large contracts according to the requirements of European customers 	<p>W (weaknesses):</p> <ul style="list-style-type: none"> – Seasonality of production; – Currency fluctuations – Migration of workers due to low wages; – Outflow of skilled workers to the informal sector due to tax burden on wages; – Lack of domestic production of fabric manufacturing; – High level of depreciation rate of fixed assets
<p>O (opportunities):</p> <ul style="list-style-type: none"> – Small-scale, experimental and design orders placed at small and medium enterprises of textile industry; – Mobility, shortening contract execution times due to proximity to European markets (saving at least 2 months compared to China) 	<p>T (threats):</p> <ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Periodic delays in customs clearance, which may affect the timely execution of orders; – Presence of a significant amount of second-hand clothes and footwear; – Dumped imports

3.3. Metalworking

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 2 558 metalworking enterprises, of which 703 are legal entities (27%), and 1 855 - individual entrepreneurs (73%).

The largest number of companies operates in Kyiv region (781 units or 31%), and the least – in Kirovohrad region (161 units or 6%).

The sector is employing 22 184 full-time employees, including 18 266 in legal entities (82%), and 3 918 are employed by individual entrepreneurs (about 18%). The sector's leader by the number of employees is Kyiv region (5 289 people or 24%), while the smallest employment in the sector is in Kirovohrad region (1 172 people or almost 5%).

Table 3.14. Number of functioning enterprises and employment in metalworking in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	79	274	353	1 563	526	2 089
Chernihiv	60	155	215	2 439	254	2 693
Khmelnyskiy	83	296	379	2 238	619	2 857
Kirovohrad	37	124	161	915	257	1 172
Kyiv	283	498	781	4 262	1 027	5 289
Vinnytsia	84	306	390	3 363	903	4 266
Zhytomyr	77	202	279	3 486	332	3 818
Total	703	1 855	2 558	18 266	3 918	22 184

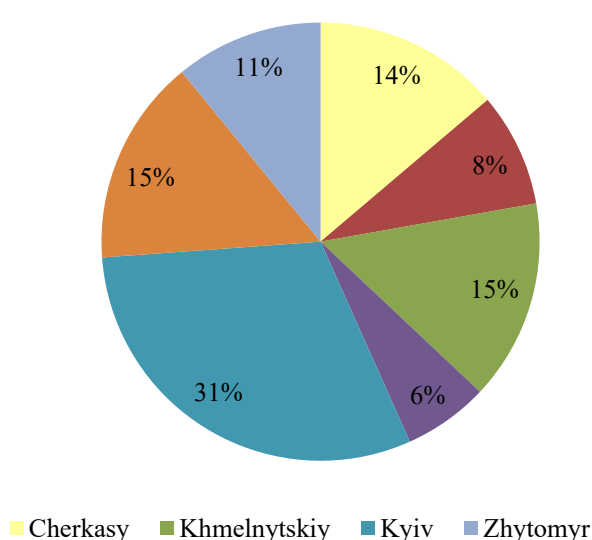


Fig. 3.22. Breakdown of metalworking enterprises by regions

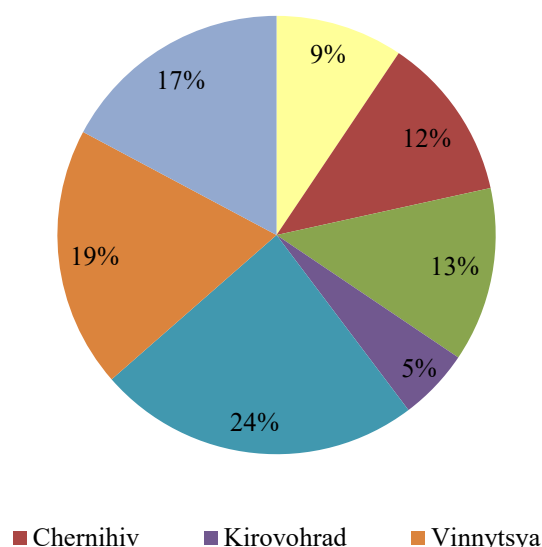


Fig. 3.23. Regional employment structure in metalworking

Sales

In 2018, sales volume of metalworking enterprises amounted to about UAH 16 344 million, of which UAH 15 040 million were generated by legal entities (92%), and the rest UAH 1 304 million – by individual entrepreneurs (about 8%).

In the regional structure, the leaders are Kyiv region (UAH 6 947 million or 43% of sales), Vinnytsia region (UAH 2 622 million or 16%) and Zhytomyr region (UAH 2 453 million or 15%). Together, these regions account for more than 74% of metalworking enterprises sales among 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in metalworking production is about 26%.

Table 3.15. The volume of sales of metalworking enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	1 040.4	168.2	1 208.5
Chernihiv	1 432.4	96.5	1 528.8
Khmelnyskiy	936.8	149.2	1 086.1
Kirovohrad	445.4	53.0	498.4
Kyiv	6 579.8	367.5	6 947.3
Vinnytsia	2 256.7	365.6	2 622.3
Zhytomyr	2 348.7	103.8	2 452.5
Total	15 040.1	1 303.8	16 343.9

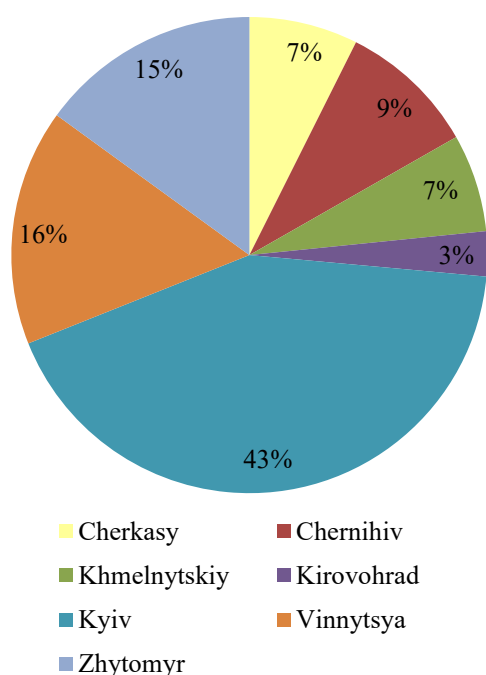


Fig. 3.24. Regional sales of metalworking products

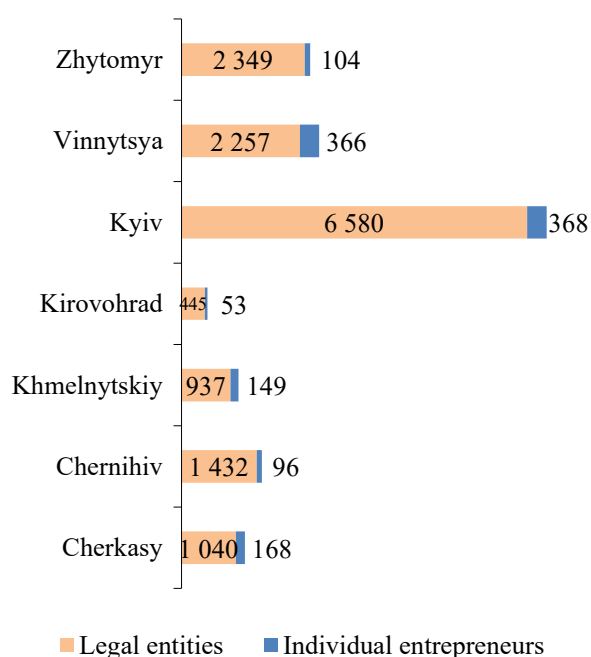


Fig. 3.25. Regional sales of metalworking products by type of business entity, mln. UAH

Export

In 2018, the volume of metalworking products export in 7 Central Ukrainian regions under investigation amounted to about USD 133.6 million, of which almost 36% was generated by Kyiv region (USD 47.7 million).

Steel structures (19% of total exports of the sector) and Casks, drums, cans, boxes and similar containers dominate in the commodity structure of exports (19%).

Main foreign sales markets are Russia (26%), Poland (19%) and Germany (13%).

Table 3.16. The volume of export by the companies of the metalworking in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnyskiy	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Structures and parts of structures, of iron or steel	157	18 211	347	674	4 138	91	1 284	24 903
Casks, drums, cans, boxes and similar containers	1				24 850	0		24 851
Table, kitchen or other household articles, and parts thereof, of iron or steel	78	7	28		1 236	442	20 376	22 166
Articles of iron or steel, n.e.s.	288	691	500	316	6 312	428	7 895	16 429
Central heating boilers, non-electric	56	261	2 654		210	1 322	6 932	11 435
Wire, rods, tubes, plates, electrodes and similar products					11	10 120		10 131
Moulding boxes for metal foundry	0	868	14	31	2 518	111	104	3 647
Stoppers, caps and lids	190	3		0	2 311	585	91	3 180
Screws, bolts, nuts, coach screws, screw hooks, rivets, cotters, cotter pins, washers	1 985	266	15	74	279	9	8	2 636
Structures and parts of structures of aluminium	19	12	4		1 589	13	45	1 682
Radiators for central heating, non-electrically heated, of iron or steel	3	104		18	463	927		1 515
Steam or other vapour generating boilers	1 152		33		218			1 404
Nails, tacks, drawing pins, corrugated nails, staples of iron or steel	0	6	1 337		1	18	2	1 365
Base metal mountings, fittings and similar articles suitable for furniture, doors, staircases, windows, blinds, coachwork, saddlery, trunks, chests, caskets or the like	85	13	99	2	839	50	246	1 335
Tools, interchangeable, for hand tools, whether or not power-operated, or for machine tools	32	48	186	61	496	253	17	1 092
Articles of aluminium, n.e.s.	1	3	6	11	945	20	44	1 032
Reservoirs, tanks, vats and similar containers, of iron or steel, for any material 'other than compressed or liquefied gas', of a capacity of > 300 l		12	39		63	69	687	870
Cloth, incl. endless bands, grill, netting and fencing, of iron or steel	16				132		297	446

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
wire, expanded metal of iron or steel								
Articles of iron or steel, cast, n.e.s.	1	0	20	325	21	2	3	371
Knives and cutting blades, of base metal, for machines or for mechanical appliances	21	14	46	1	183	77	8	351
Hand-operated mechanical devices, of base metal, weighing ≤ 10 kg, used in the preparation of food or drink	246	10	2			83		342
Hand tools	42	4	1	1	233	17	3	301
Tanks, casks, drums, cans, boxes, of a capacity of ≤ 300 l	17	1	0	0	43	203	1	266
Chain and parts thereof, of iron or steel	30	16	105	0	18	62	5	236
Aluminium containers for compressed or liquefied gas							198	198
Hand tools, the following: spades, shovels, mattocks, picks, hoes, forks and rakes, of base metal			1		155	1	1	157
Springs and leaves for springs, of iron or steel	12	11	8	73	14	8	28	154
Bells, gongs and the like, non-electric, of base metal	3	55			53	6	30	147
Padlocks and locks “key, combination or electrically operated”, of base metal		0	41		100		2	143
Handsaws, with working parts of base metal			52		57		4	113
Table, kitchen or other household articles of aluminium			3		16	26	60	104
Other products	16	208	25	44	154	64	95	606
Total	4 448	20 826	5 569	1 633	47 659	15 007	38 465	133 607

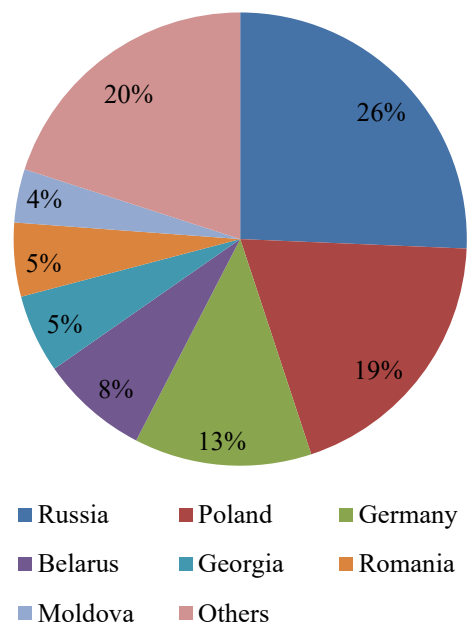
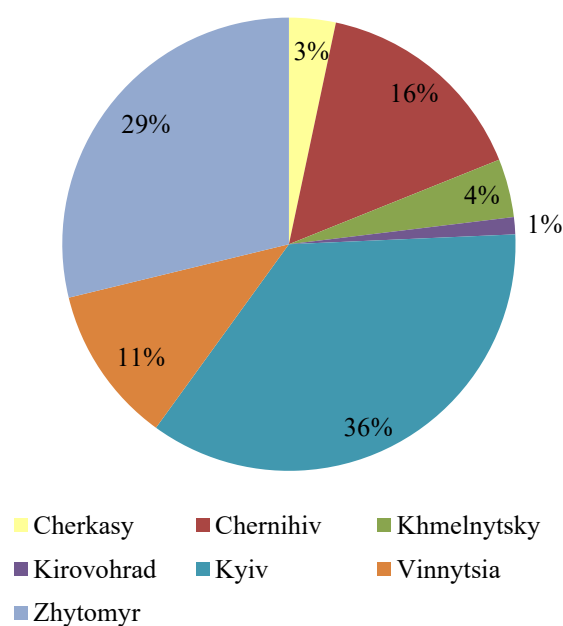


Fig. 3.26. Regional breakdown of metalworking products export

Fig. 3.27. Metalworking products export by destinations

Leading companies of the sector

The main metalworking companies in 7 Central Ukrainian regions under investigation are “Ken-Pack (Ukraine)” LLC, PEK Energo LLC and Plasmatech PJSC.

Table 3.17. Leading metalworking companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	more than 100
32976889	PEK Energo LLC	ТОВ “ПЕК Енерго”	more than 100
3567397	Plasmatech PJSC	ПАТ “Плазматек”	more than 100
32265502	Foreign enterprise Eurogold Industries Ltd.	Іноземне підприємство “Євроголд Індестріз лтд”	more than 100
35234409	“Alutekh-K” LLC	ТОВ “Алютех-К”	more than 100
40848765	TMM-Energobud Management LLC	ТОВ “ТММ-Енергобуд Менеджмент”	more than 100
36584037	“Metal Invest” Company LLC	ТОВ “Компанія “Метал Інвест”	more than 100
14307831	State Enterprise “Krasyliv Aggregate Plant”	Державне підприємство “Красилівський Агрегатний Завод”	more than 100
1413394	PJSC “Zhytomyr Plant of Protective Structures”	ПрАТ “Житомирський завод огорожувальних конструкцій”	more than 100
21336490	Neil LLC	ТОВ “Нейл”	more than 100

Regional distribution of the largest companies in the sector is shown in Table 3.18.

Table 3.18. Top-10 metalworking companies by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	32976889	PEK Energo LLC	ТОВ “ПЕК Енерго”	more than 100
	3567397	Plasmatech PJSC	ПАТ “Плазматек”	more than 100
	14307570	PJSC “Bar Machine Building Plant”	ПрАТ “Барський машинобудівний завод”	more than 100
	20105053	“Avesta” LLC	ТОВ “Авеста”	25-50
	31542592	Elit Company LLC	ТОВ “Компанія”Еліт”	25-50
	30684630	Laris Private Enterprise	Приватне підприємство “Ларіс”	25-50
	34765974	“Ozols Engineering and Production Center” Private Enterprise	Приватне підприємство “Інженерно-Виробничий Центр “Озолс”	25-50
	37294344	“Avesta A” LLC	ТОВ “Авеста А”	25-50
	38512192	“Vinnytsia Tool Factory” LLC	ТОВ “Вінницький інструментальний завод”	less than 25
	33801896	“Mario” Production Enterprise LLC	ТОВ “Виробниче підприємство “Маріо”	less than 25
Kyiv	32201166	“Ken-Pack (Ukraine)” LLC	ТОВ “Кен-Пак (Україна)”	more than 100
	35234409	“Alutekh-K” LLC	ТОВ “Алютех-К”	more than 100
	38286161	Grain House LLC	ТОВ “Зерновий Дім”	more than 100
	36086606	“Metal Galva Ukraine” LLC	ТОВ “Метало Гальва Україна”	more than 100
	39525917	“Art-Mark” LLC	ТОВ “Арт-Марк”	more than 100
	32167106	Pantek-Manufacturing LLC	ТОВ “Пантек-Виробництво”	more than

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
				100
	36107594	Atlant-Plus Production Commercial Firm LLC	ТОВ "Виробнича Комерційна Фірма "Атлант-Плюс"	50-100
	36185908	Mediadget LLC	ТОВ "Медіаджет"	50-100
	5495354	"Brovary Boiler Plant Ardennes" ALC	ТДВ "Броварський Завод Котельного Устаткування Арденз"	50-100
	32955675	"Front Systems Metal Yapy" LLC	ТОВ "Фасадні Системи Метал Япи"	50-100
Khmelnyskiy	14307831	State Enterprise "Krasyliv Aggregate Plant"	Державне підприємство "Красилівський Агрегатний Завод"	more than 100
	21336490	Neil LLC	ТОВ "Нейл"	more than 100
	34543250	Atmash Plant LLC	ТОВ "Завод "Атонмаш"	50-100
	36475350	Subsidiary "Kotlomash" OJSC "Krasylivsky Machine Building Plant"	Дочірнє підприємство "Котломаш" ВАТ "Красилівський машинобудівний завод"	25-50
	35361099	Production and Commercial Firm "Dakh-Service" LLC	ТОВ Виробничо-Комерційна Фірма "Дах-Сервіс"	25-50
	36016607	Techcolor LLC	ТОВ "Техколор"	25-50
	21342383	Private Production and Commercial Firm "Bdzhilka"	Приватна Виробничо-Комерційна Фірма "Бджілка"	less than 25
	39524761	Ecometal Joint Venture LLC	ТОВ Спільне підприємство "Екометал"	less than 25
	30788134	Private enterprise "Alyum Plus"	Приватне підприємство "Алюм Плюс"	less than 25
	33177496	"Stilart.Ua" LLC	ТОВ "Стильарт.Уа"	less than 25
Cherkasy	36584037	"Metal Invest" Company LLC	ТОВ "Компанія "Метал Інвест"	more than 100
	37106104	"MGK-Cherkasy" LLC	ТОВ "МГК-Черкаси"	more than 100
	14185003	Rost LLC	ТОВ "Рост"	more than 100
	31100615	"Monastyrskhe Production and Implementation Firm "Energetik" LLC	ТОВ "Монастирищенська Виробничо-Впроваджувальна Фірма "Енергетик"	50-100
	40802156	Metogalva LLC	ТОВ "Металогальва"	25-50
	34382689	"Production and Commercial Enterprise" Spectr "LLC	ТОВ "Виробничо-Комерційне підприємство "Спектр"	25-50
	37921881	"Partek Ukraine" LLC	ТОВ "Партек Україна"	25-50
	38469836	Mokavto LLC	ТОВ "Мокавто"	25-50
	32929528	Private enterprise "Gazpolimerkomplekt"	Приватне підприємство "Газполімеркомплект"	25-50
	22794087	Spectr-Smila JSC	ПрАТ "Спектр-Сміла"	less than 25
Zhytomyr	32265502	Foreign enterprise Eurogold Industries LTD	Іноземне підприємство "Євроголд Індекстріз ЛТД"	more than 100
	1413394	JSC "Zhytomyr Plant of Protective Structures"	ПрАТ "Житомирський завод огорожувальних конструкцій"	more than 100
	30853412	Atem-Frank Joint Ukrainian-German Enterprise	Спільне українсько-німецьке підприємство "Атем-Франк"	more than 100
	36575373	Zhytomyrteplomash LLC	ТОВ "Житомиртепломаш"	more than 100
	35299597	Krieger Boiler Plant LLC	ТОВ "Котлозавод "Крігер"	more than 100
	31739156	"Steel Plant Ukrstal Zhytomyr" LLC	ТОВ "Завод Металоконструкцій Укрсталь Житомир"	more than 100

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	39966290	"Krapit" LLC	ТОВ "Крапйт"	50-100
	38290492	"Trading House Korosten Thermal Engineering Plant" LLC	ТОВ "Торговий Дім Коростенський завод теплотехнічного обладнання"	50-100
	39824840	Astem Trade LLC	ТОВ "Астем Трейд"	25-50
	35954611	Supersprox Ukraine LLC	ТОВ "Суперспрокс Україна"	25-50
Kirovohrad	40945923	"Svitlovodsk Metallic Structural Plant" LLC	ТОВ "Світловодський завод металевих конструкцій"	50-100
	34813572	"Kirovohrad Tooling Plant" Lezo" LLC	ТОВ "Кіровоградський інструментальний завод "Лезо"	50-100
	33254224	"Ukrpromtara" LLC	ТОВ "Укрпромтара"	25-50
	23685704	Kit-Consulting LLC	Науково-Виробнича Фірма "Кіт-Консалтинг" ТОВ	25-50
	40603301	Alexandria Laser Technology LLC	ТОВ "Олександрійські Лазерні Технології"	25-50
	38319296	Ferrumbudenergo Private Enterprise	Приватне підприємство "Ферумбуденерго"	less than 25
	34629374	Eurostand LLC	ТОВ "Євростенд"	less than 25
	23098355	Private enterprise "Intercenter"	Приватне підприємство "Інтерцентр"	less than 25
	22219803	Karma Scientific and Production Company LLC	ТОВ Науково-Виробнича Фірма "Карма"	less than 25
	38268776	Private enterprise "Budpostach-L"	Приватне підприємство "Будпостач-Л"	less than 25
Chernihiv	40848765	TMM-Energobud Management LLC	ТОВ "ТММ-Енергобуд Менеджмент"	more than 100
	33586107	Chernihiv Blacksmith Plant LLC	ТОВ "Чернігівський ковальський завод"	more than 100
	14307297	State Enterprise "Research and Production Complex Progress"	Державне підприємство Науково-Виробничий Комплекс "Прогрес"	more than 100
	39791716	Inspetsprom LLC	ТОВ "Інспецпром"	50-100
	36823198	Private enterprise "Altep Center."	Приватне підприємство "Альтеп-Центр."	50-100
	31919128	"Uday" LLC	ТОВ "Удай"	50-100
	3576858	PJSC "Chernihiv Mechanical Plant"	ПрАТ "Чернігівський механічний завод"	25-50
	222462	PJSC "Chernihiv Tool Plant"	ПрАТ "Чернігівський інструментальний завод"	25-50
	1267930	PJSC "Plant of metal structures and hardware"	ПрАТ "Завод металоконструкцій та металооснастки"	25-50
	40549281	Cesara Det LLC	ТОВ "Чезара Деталь"	25-50

Key obstacles observed in the sector

While identifying main obstacles for the development of metalworking in 7 Central Ukrainian regions under investigation 157 companies were contacted, of which 119 (76%) agreed to participate in the survey, and 38 (24%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.

The Ukrainian metalworking sector faces some important challenges. Interviewed companies accentuated the following key obstacles to growth: lack of market demand (45%), inaccessibility of funding (40%) and shortage of workers (33%).

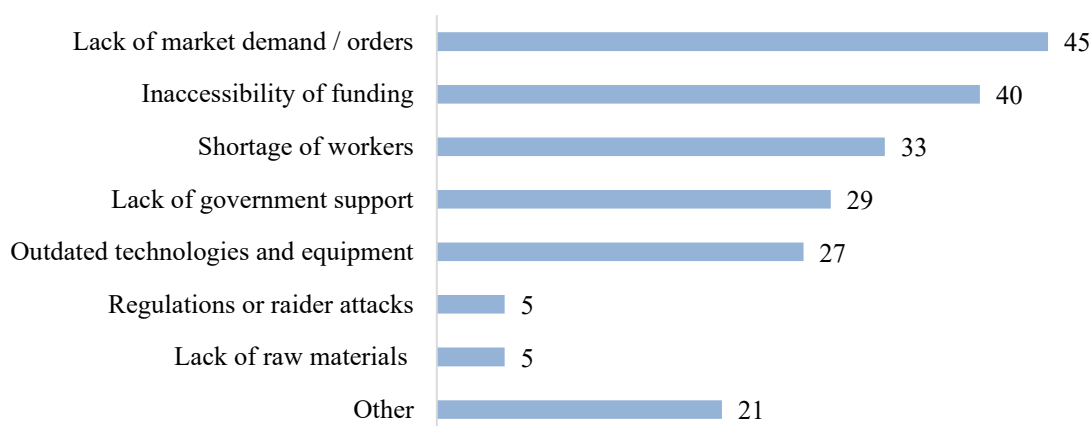


Fig. 3.28. The rating of main obstacles for the development of metalworking industry in 7 Central Ukrainian regions under investigation, %

A greater part of metal processing enterprises in the studied region are old Soviet factories that are in urgent need of equipment modernization and improvement of the quality of manufactured products. The use of outdated equipment (high resource and energy consumption of production) and low quality of manufactured products reduces the competitiveness of enterprises, which, as a result, have problems with sales markets both in Ukraine and for export.

Due to low labour productivity at enterprises there is a significant outflow of workers.

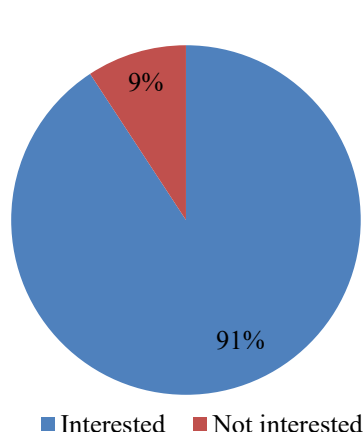


Fig. 3.29. The interest of metalworking enterprises in cooperation with the Dutch business

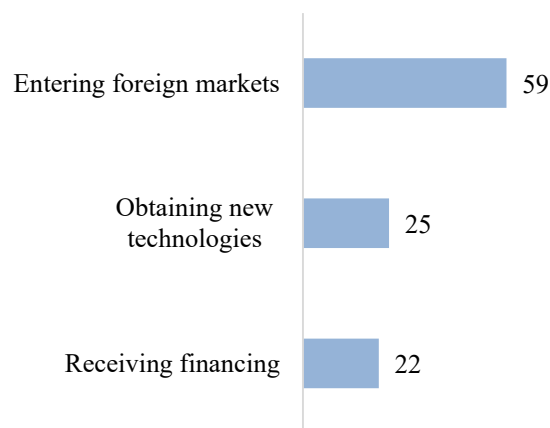


Fig. 3.30. Main areas of potential cooperation with the Dutch business in the metalworking industry, %

Modernization requires affordable long-term financing, with a lending rate of <10% per annum of at least 3 years. As for now, there are no state programs aimed at stimulating and supporting the modernization of industrial production (cheaper loans, lending rate compensation, etc.). There is also no effective state policy to stimulate the export of manufactured products.

There is a lack of production of high-quality metal products that are not produced in Ukraine. Also, the price of domestic made metal in the Ukrainian market is 30% higher than export prices, which significantly reduces the profitability of metal-working enterprises.

For those enterprises that have already achieved a sufficiently high quality level of their products, the most serious problem is the obstacles to entering the world market.

Also recently, companies are seeing a decrease in orders from their foreign partners due to expectations of stagnation in world markets.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 91% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in entering foreign markets (59%), obtaining new technologies (25%) and receiving financing (22%).

SWOT analysis of the sector

<u>S (strengths)</u>	W (weaknesses)
<ul style="list-style-type: none"> – Geographical proximity to Europe's capacious markets; – Convenient geographic location close to metallurgical plants – Availability of diverse raw materials – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Well-educated staff and strong engineering education; – Availability of equipment and experience to perform complex engineering solutions 	<ul style="list-style-type: none"> – Reduction of demand in the domestic market due to a decrease in construction volumes; – Low percentage of legal entities with European certification; – High level of depreciation of fixed assets
O (opportunities)	T (threats)
<ul style="list-style-type: none"> – Ability to execute complex orders, including small-scale, experimental, design know-how; – Proximity to the EU reduces the cost of delivery of such orders compared with China 	<ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Currency fluctuations

3.4. Furniture production

General overview of the sector

In 7 Central Ukrainian regions under investigation, there are 2 371 enterprises producing furniture, of which 313 are legal entities (13%), and 2 058 - individual entrepreneurs (87%).

The largest number of companies operates in Kyiv region (729 units or 31%), and the least – in Kirovohrad region (125 units or 5%).

The sector is employing 14 117 full-time employees, including 8 656 in legal entities (about 61%), and 5 461 are employed by individual entrepreneurs (39%). The sector's leader by the number of employees is Kyiv region (4 295 people or 30%), while the smallest employment in the sector is in Chernihiv region (895 people or 6%).

Table 3.19. Number of functioning enterprises and employment in furniture production in 2018

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Cherkasy	54	335	389	1 813	1 096	2 909
Chernihiv	39	249	288	277	618	895
Khmelnyskiy	28	238	266	1 476	609	2 085
Kirovohrad	21	104	125	1 173	220	1 393
Kyiv	124	605	729	2 659	1 636	4 295
Vinnytsia	20	319	339	705	593	1 298
Zhytomyr	27	208	235	553	689	1 242
Total	313	2 058	2 371	8 656	5 461	14 117

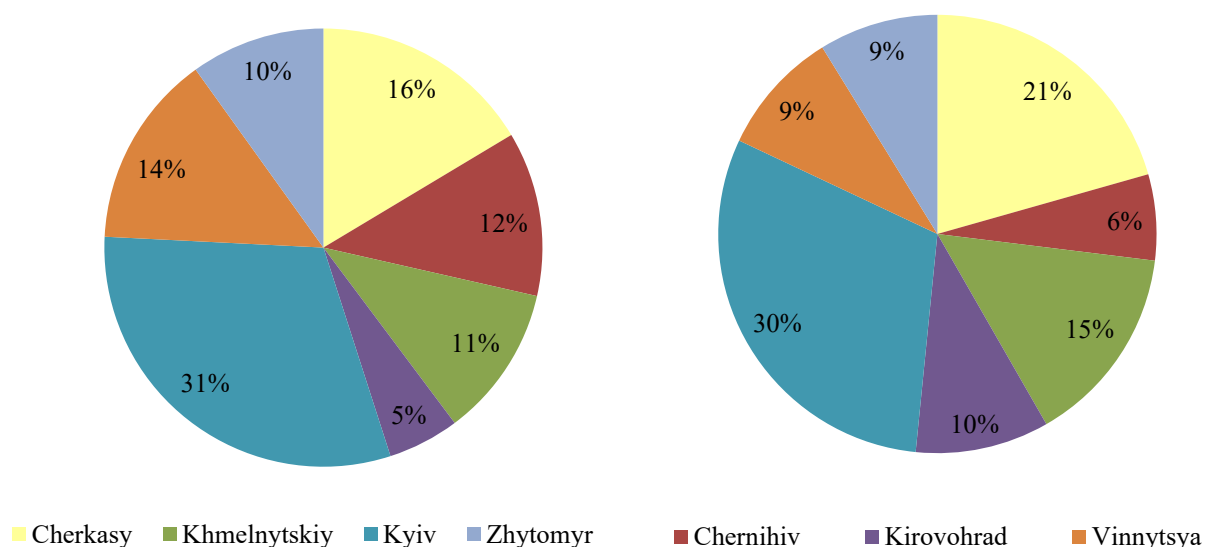


Fig. 3.31. Breakdown of furniture production enterprises by regions

Fig. 3.32. Regional employment structure in furniture production

Sales

In 2018, sales volume of furniture amounted to about UAH 6 022 million, of which UAH 4 867 million were generated by legal entities (81%), and the rest UAH 1 154 million – by individual entrepreneurs (about 19%).

In the regional structure, the leaders are Kyiv region (UAH 2 212 million or 37% of sales), Khmelnytskyi region (UAH 1 143 million or 19%) and Cherkasy region (UAH 909 million or 15%). Together, these regions account for more than 71% of furniture sales among 7 Central Ukrainian regions under investigation.

According to the results of companies' survey, the average level of sales through retail networks in furniture production is about 26%.

Table 3.20. The volume of sales of furniture production enterprises in 2018, mln. UAH

Region	Legal entities	Individual entrepreneurs	Total
Cherkasy	710.9	198.5	909.4
Chernihiv	77.2	125.7	202.9
Khmelnytskyi	1 039.3	104.1	1 143.4
Kirovohrad	671.9	60.6	732.4
Kyiv	1 846.5	365.6	2 212.1
Vinnytsia	330.5	154.7	485.2
Zhytomyr	191.1	145.0	336.1
Total	4 867.3	1 154.2	6 021.5

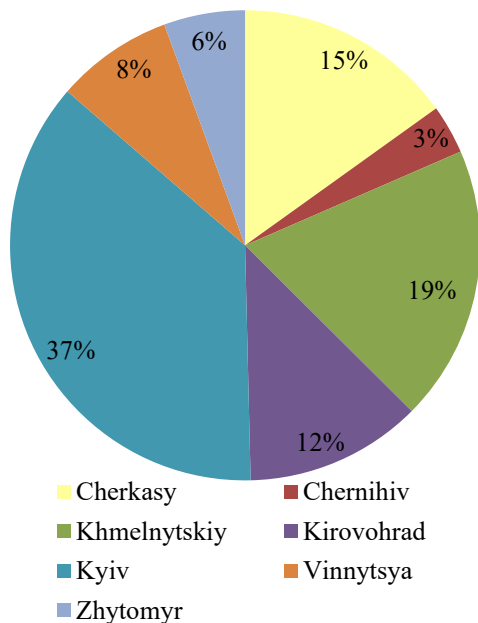


Fig. 3.33. Regional sales of furniture

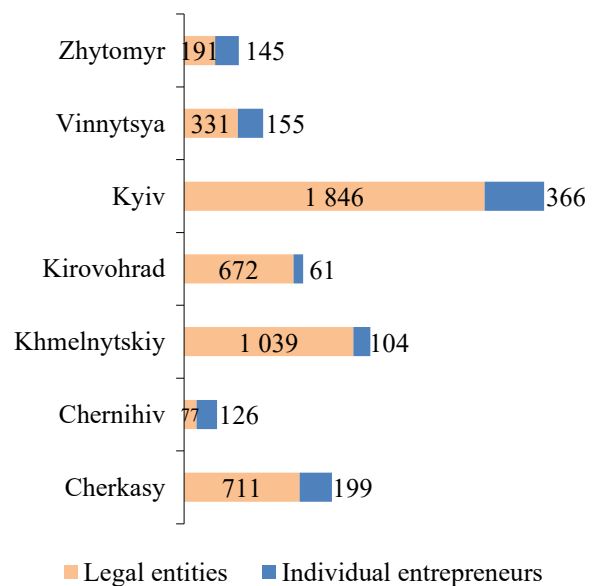


Fig. 3.34. Regional sales of furniture by type of business entity, mln. UAH

Other furniture (mainly bedroom furniture and furniture for the dining-room and living-room) dominate in the commodity structure of sales (53% of total sales of the sector). Kitchen furniture prevails in Kyiv region (sales volume – UAH 234 million or 53% of subsector sales), mattresses production – in Kirovohrad region (UAH 141 million or 75%), office and shop furniture production – in Kyiv region (UAH 900 million or 52%), and other furniture production – in Kyiv region (UAH 1 076 million or 34%).

Table 3.21. Sales of furniture in 2018 by subsectors, mln. UAH

Subsector	Regions							Total
	Cherkasy	Chernihiv	Khmelnyskiy	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Manufacture of office and shop furniture	160.3	99.3	56.3	83.5	899.9	320.8	125.3	1 745.4
Manufacture of kitchen furniture	19.3	9.0	13.6	5.5	233.9	104.4	50.9	436.5
Manufacture of mattresses	140.9	0.0	0.0	513.0	2.1	0.0	25.7	681.7
Manufacture of other furniture	589.0	94.6	1 073.5	130.5	1 076.1	60.0	134.1	3 157.8
Total	909.4	202.9	1 143.4	732.4	2 212.1	485.2	336.1	6 021.5

Source: State Statistic Committee of Ukraine

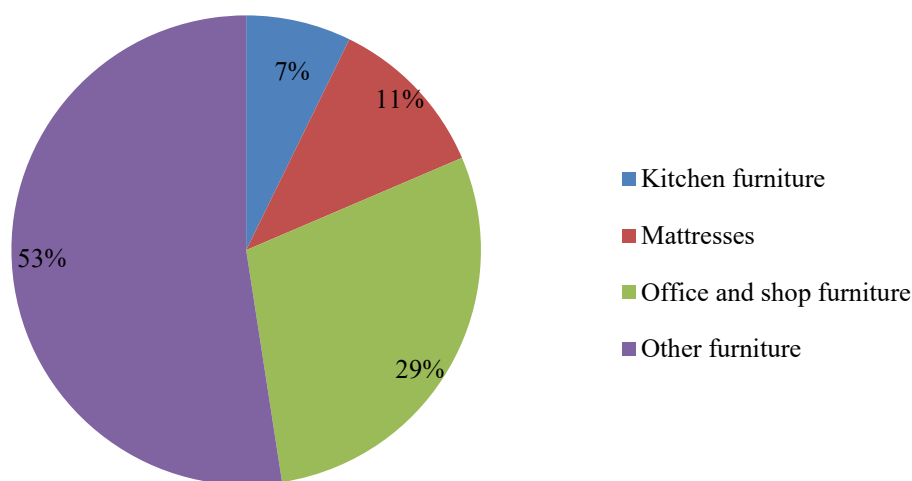


Fig. 3.35. Sales of furniture by subsegments

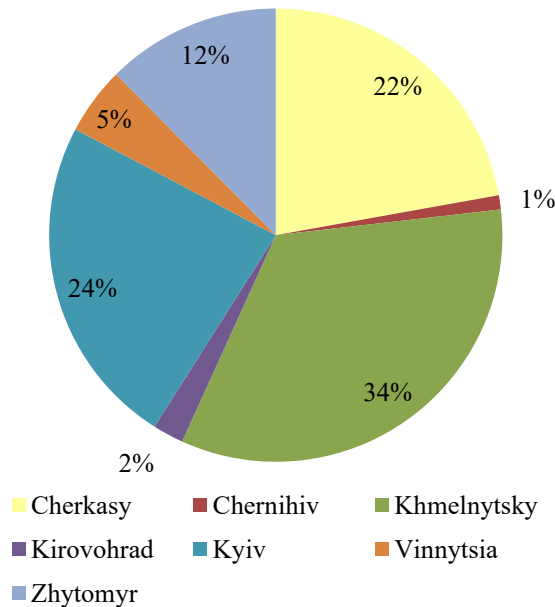
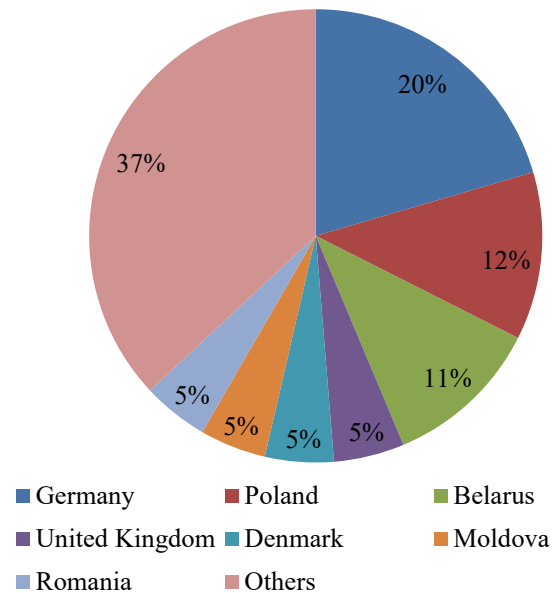
Export

In 2018, the volume of furniture products exports in 7 Central Ukrainian regions under investigation amounted to about USD 68.5 million, of which almost 34% was generated by Khmelnytskyi region (USD 23.0 million) and 24% - by Kyiv region (USD 16.2 million).

Main foreign sales markets are Germany (20%), Poland (12%) and Belarus (11%).

Table 3.22. The volume of furniture export in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnitsia	Zhytomyr	
Furniture and parts thereof	12 364	166	22 933	749	14 671	2 491	5 472	58 846
Seats, whether or not convertible into beds, and parts thereof	2 216	152	73	274	1 247	772	123	4 856
Mattress supports	606	374	1	486	346	38	2 925	4 775
Total	15 186	691	23 006	1 508	16 264	3 301	8 520	68 477

**Fig. 3.36. Regional breakdown of furniture export****Fig. 3.37. Furniture exports by destinations**

Leading companies of the sector

The main furniture producers in 7 Central Ukrainian regions under investigation are LLC “Katerynoslav Furniture Workshops”, Aqua-Rodos LLC and “PJSC “World of Furniture-Ukraine”.

Table 3.23. Leading furniture production companies

ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
33698667	LLC “Katerynoslav Furniture Workshops”	ТОВ “Катеринославські меблеві майстерні”	more than 100
32065083	Aqua-Rodos LLC	ТОВ “Аква- Родос “	more than 100
3366434	PJSC “World of Furniture-Ukraine”	ПрАТ “Світ Меблів-Україна”	more than 100
31387134	“Ukrug” LLC	ТОВ “Укрюг”	more than 100
40764556	Anshar Trading House LLC	ТОВ “Торговий Дім “Аншар”	more than 100
39457891	Veneto Group LLC	ТОВ “Група Венето”	more than 100
37083763	“Starokostiantyniv Furniture Factory” LLC	ТОВ “Старокостянтинівська меблева фабрика”	more than 100
31030962	PJSC “Dniprowood”	ПрАТ “Дніпровуд”	more than 100
33317231	“Sanservice” LLC	ТОВ “Сансервіс “	more than 100
30801338	Juventa LLC	ТОВ “Ювента “	more than 100

Regional distribution of the largest companies in the sector are shown in Table 3.24.

Table 3.24. Top-10 companies of furniture production by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
Vinnytsia	40764556	Anshar Trading House LLC	ТОВ “Торговий Дім “Аншар”	more than 100
	13319677	Private Small Enterprise “Helika”	Приватне Мале підприємство “Геліка”	25-50
	34363645	Lismaster LLC	ТОВ “Лісмайстер”	25-50
	39322949	Khmilnykmebli Ltd.	ТОВ “Хмільникмеблі”	less than 25
	40053917	Khmilnyk Tartak Private Enterprise	Приватне підприємство “Хмільник Тартак”	less than 25
	20096083	Production Co-operative “Uyut”	Виробничий Кооператив “Уют”	less than 25
	32701521	Private enterprise “Interstyle”	Приватне підприємство “Інтерстиль”	less than 25
	39558235	Blonsky LLC	ТОВ “Блонські”	less than 25
	41207760	Makka LLC	ТОВ “Макка”	less than 25
	39675425	Global Imex LLC	ТОВ “Глобал Імекс”	less than 25
Kyiv	31387134	“Ukrug” LLC	ТОВ “Укрюг”	more than 100
	38312505	“Ukrainian Furniture Holding Arnio” LLC	ТОВ “Український Меблевий Холдинг “Арніо”	more than 100
	35784726	Metkaspostach LLC	ТОВ “Меткаспостач”	more than 100
	212831	“Electronahrivach” ALC	ТДВ “Електронагрівач”	50-100
	31254699	“Metalevi Mebli” LLC	ТОВ “Металеві Меблі”	50-100
	30349501	Primtex Plus LLC	ТОВ “Примтекс Плюс”	50-100
	33223259	“Comfort Furniture” Private Enterprise	Приватне підприємство “Комфорт Меблі”	50-100
	39807977	“LKHP Ukraine” LLC	ТОВ “ЛХП Україна”	50-100
	32210799	Roscom LLC	ТОВ “Розком”	25-50
	32709803	Nika Company LLC	ТОВ “Ніка Компані”	25-50
Khmelnyskiy	32065083	Aqua-Rodos LLC	ТОВ “Аква- Родос “	more than 100
	37083763	“Starokostiantyniv Furniture Factory” LLC	ТОВ “Старокостянтинівська меблева фабрика”	more than 100
	33317231	“Sanservice” LLC	ТОВ “Сансервіс “	more than 100
	30801338	Juventa LLC	ТОВ “Ювента “	more than 100
	36420474	Yuvvis LLC	ТОВ “Юввіс”	25-50
	14171739	TK Vicent LLC	ТОВ “ТК Вісент”	less than 25
	37646565	Julius Trading LLC	ТОВ “Юліус Трейдинг”	less than 25
	40145269	PIK Furniture Factory LLC	ТОВ “меблева фабрика “ПІК”	less than 25
	35916492	Carmen-Furniture LLC	ТОВ “Кармен- Меблі”	less than 25
	40195147	“GF Furniture Company” LLC	ТОВ “Джі.Еф.Меблева Компанія”	less than 25
Cherkasy	3366434	PJSC “World of Furniture-Ukraine”	ПрАТ “Світ Меблів-Україна”	more than 100
	39457891	Veneto Group LLC	ТОВ “Група Венето”	more than 100
	5486800	PJSC “Ruska Polyana Furniture Factory”	ПрАТ “Руськополянський меблевий комбінат”	50-100
	36785191	“Althea” LLC	ТОВ “Альтея”	25-50
	36299742	“Razek Cherkasy” LLC	ТОВ “Разек Черкаси”	25-50
	37412244	“Prudivus” LLC	ТОВ “Прудивус”	25-50
	30145739	“Galen 1” LLC	ТОВ “Гален 1”	less than 25
	41225271	“Vico Furniture” LLC	ТОВ “Віко Меблі”	less than 25
	25210075	Furniture Living LLC	ТОВ “Меблі Ліве”	less than 25
	24359697	Best Trade LLC	ТОВ “Бест Трейд”	less than 25
Zhytomyr	31030962	PJSC “Dniprowood”	ПрАТ “Дніпровуд”	more than 100
	13549302	Private Enterprise “Furniture Factory Myrt”	Приватне підприємство “Меблева Фабрика “Мірт”	50-100
	34126306	“Sonchik” LLC	ТОВ “Сончік”	25-50

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues, mln. UAH
	41331287	Garant Export LLC	ТОВ "Гарант Експорт"	25-50
	31106292	"Klasum Factory" LLC	ТОВ "Фабрика Класум"	25-50
	36575860	Vanland LLC	ТОВ "Ванланд"	less than 25
	35842060	"Luch-K" LLC	ТОВ "Луч-К"	less than 25
	38731724	Fort Mebli LLC	ТОВ "Форт Меблі"	less than 25
	13555432	Partner LLC	ТОВ "Партнер"	less than 25
	33864706	Vivex LLC	ТОВ "Вівекс"	less than 25
Kirovohrad	33698667	"Katerynoslav Furniture Workshops" LLC	ТОВ "Катеринославські мебелів майстерні"	more than 100
	13748444	Private small business research and production firm "KIT"	Приватне мале підприємство науково-виробнича фірма "КІТ"	50-100
	37503032	Eurostand-Group LLC	ТОВ "Євростенд-Груп"	25-50
	37540692	"Davidos" LLC	ТОВ "Давидос"	25-50
	3972867	Enterprise of the Citizens' Association "Kropyvnytskyi Training and Production Enterprise of the Ukrainian Society of the Deaf"	Підприємство об'єднання громадян "Кропивницьке учбово-виробниче підприємство Українського Товариства Глухих"	25-50
	38693019	Display Production LLC	ТОВ "Дисплей Продакшн"	less than 25
	41341227	Eurostand Export LLC	ТОВ "Євростенд Експорт"	less than 25
	39623199	Anro Production Company LLC	ТОВ "Виробнича Компанія "Анро"	less than 25
	40805831	"Art-Stil" LLC	ТОВ "Арт-Стіл"	less than 25
	40096053	Micropool Ukraine LLC	ТОВ "Мікропул Україна"	less than 25
Chernihiv	39881013	Art In Head LLC	ТОВ "Арт Ін Хед"	less than 25
	32921248	Young Ukraine LLC	ТОВ "Янг Україна"	less than 25
	36279351	Private enterprise "Personnel Center" Nova Robota "	Приватне підприємство "Кадровий Центр "Нова Робота"	less than 25
	40542915	"Shkafnik" LLC	ТОВ "Шкафник"	less than 25
	37299337	Subsidiary company "Veres Company" of "Veres Company" LLC	Дочірнє Підприємство "компанія "Верес" ТОВ "Компанія "Верес"	less than 25
	41729961	Mont Bon LLC	ТОВ "Мон Бон"	less than 25
	41104679	Industrial Commercial Enterprise "Lider MSC" LLC	ТОВ "Виробниче комерційне підприємство Лідер МСК"	less than 25
	22828202	Ayuto Private Enterprise	Приватне підприємство "Аюто"	less than 25
	14236404	Private Production and Commercial Enterprise "Courier"	Приватне Виробничо-Комерційне Підприємство Фірма "Кур'єр"	less than 25
	41370436	Comfort-Che LLC	ТОВ "Комфорт-ЧЕ"	less than 25

Key obstacles observed in the sector

While identifying main obstacles for the development of furniture production in 7 Central Ukrainian regions under investigation 76 companies were contacted, of which 62 (82%) agreed to participate in the survey, and 14 (18%) refused. The following figure shows the rating of the obstacles as they are perceived by enterprises.

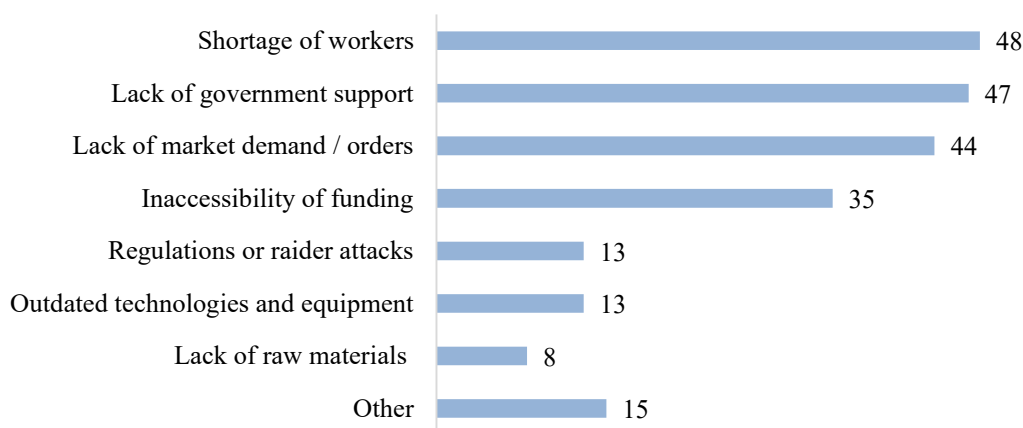


Fig. 3.38. The rating of main obstacles for the development of furniture industry in 7 Central Ukrainian regions under investigation, %

The Ukrainian furniture sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (48%), lack of government support (47%) and lack of market demand (44%).

Furniture manufacturers are experiencing sharp price competition for workers and sales markets in Ukraine by non-official producers registered as individual entrepreneurs, thereby optimizing tax payments.

A considerable part of furniture enterprises requires modernization of equipment and improvement of quality of products, which requires affordable long-term financing, with a loan rate of <10% per annum for at least 3 years.

As for now, there are no state programs aimed at stimulating and supporting the modernization of industrial production (cheaper loans, lending rate compensation, etc.). There is also no effective state policy to stimulate the export of manufactured products.

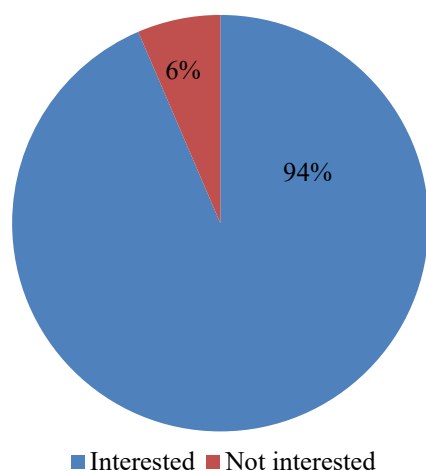


Fig. 3.39. The interest of furniture industry enterprises in cooperation with the Dutch business

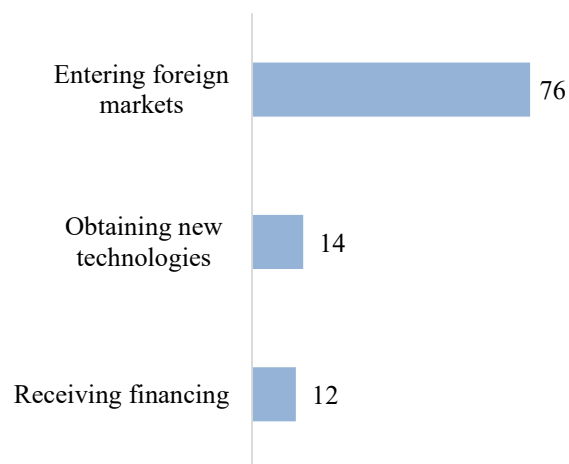


Fig. 3.40. Main areas of potential cooperation with the Dutch business in the furniture industry

Manufacturers lack the domestic furniture accessories and high-quality wood panels that they are forced to import.

Due to the general decline in the standard of living in Ukraine, the sales of cheap furniture have increased the most in recent years. The premium segment is export-driven, and often has a large queue at the domestic market. The middle segment suffered the most.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 94% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in entering foreign markets (76%), obtaining new technologies (14%) and receiving financing (12%).

SWOT analysis of the sector

S (strengths)	W (weaknesses)
<ul style="list-style-type: none"> – Availability of raw materials; – Geographical proximity to Europe's capacious markets; – Availability of developed transport infrastructure (ports, rail and road transport); – Preferential access to European markets within the framework of the DCFTA agreement; – Experience of production and export of high-quality elite furniture made from natural raw materials 	<ul style="list-style-type: none"> – Narrow national market (lack of significant demand for existing products); – Low solvency of potential customers within the country; – Currency fluctuations; – Lack of a sound marketing strategy; – Outflow of skilled workers to the informal sector due to tax burden on wages; – Lack of domestic production of furniture accessories
O (opportunities)	T (threats)
<ul style="list-style-type: none"> – Small scale and design production; – Production of high-quality luxury furniture from quality raw materials; – Growing demand in the global furniture market; – Logistic advantage of deliveries compared to orders from China 	<ul style="list-style-type: none"> – Ukrainian economic recession – Labour migration – Cheap imports and the illegal sector have advantages in the market, taking the majority of customers due to low solvent demand in the domestic market – Lack of wood due to non-transparency of wood auctions

3.5. Bioenergy (current and planned projects in bioenergy)

The use of alternative energy sources reduces CO₂ emissions compared to fossil fuels for different types of electricity production (g CO₂ eq / kWh): from 820 for coal and 490 for gas to 230, using bioenergy, 40 for solar panels, hydraulic energy - 20, wind - 12 and up to 10 solar concentrators.

Ukraine has very ambitious plans for alternative energy. According to the Paris agreement (2015) till 2035 Ukraine should reach the goal – 20% of alternative (renewable) energy in total energy production.

As of 2018 74% of alternative energy in Ukraine is bioenergy. The supply of primary energy from biofuels and waste in 2018 was 3.2 million tonnes (in oil equivalent), which corresponds to the 4.0 billion cubic meters of gas (or 12% of all gas that was consumed in Ukraine in 2018). For the last 3 years (2016-2018) biofuels and waste grew for 12.8%.

Table 3.25. Renewable energy in Ukraine for 2016-2018

№	Renewable energy for 2007-2017 ¹	Units measurement	2016	2017 ²	2018 ²
1	Total primary energy supply	th. t o.e. ²	94 383	89 625	93 165
2	Total energy supply from renewable sources	th. t o.e.	3 616	3 964	4 289
3	Share of energy supply from renewable sources	%	4%	4%	5%
Kinds and structure of renewable energy					
4	Biofuels and waste	th. t o.e.	2 832	3 046	3 195
5	as a percentage to total, %	%	78%	77%	74%
6	Hydropower	th. t o.e.	660	769	897
7	as a percentage to total, %	%	18%	19%	21%
8	Wind and solar power	th. t o.e.	124	149	197
9	as a percentage to total, %	%	3%	4%	5%

¹without occupied territory and Crimea

²thousands ton of oil equivalent

Source: State Statistic Committee of Ukraine

At the end of 2019 at the 10th International Renewable Energy Forum 2019 Ukraine had a total capacity of 2 274 MW. According to preliminary statistics for 9 months 2019, 2 661 MW of additional capacity was constructed, including 24 MW of additional capacity on biogas and 5 MW on biomass. Thus, at the beginning of Q4 2019 4.9 MW of capacity has already been officially introduced¹.

¹ “Energobusiness” magazine №48/1140, 3/12/2019, p. 11-15.

The structure of the biomass market in Ukraine

A structure of the biomass market in Ukraine provided in Table 3.26.

Table 3.26. The structure of the biomass market in Ukraine

Table 5.26: The structure of the biomass market in Ukraine				
Biomass suppliers (main sources of biomass)	Biomass processors and equipment suppliers	Biomass energy producers		
		Energy for your own consumption	Thermal energy for consumers	Sales of electricity (electricity for the market)
Supply and logistic of biomass				
Forestry	Manufacturers of pellets	Industrial enterprises	Private thermal suppliers	Electricity producers:
Woodworking	Manufacturers of boiler equipment	Cattle farms and crop farms	Municipal heat suppliers	Cattle farms which produce biogas
Agricultural companies		Private users (Households, hospitals, schools)		Companies which collect biogas at solid waste landfills
Other (Food Industry etc.)				

Sources: State agency on Efficiency and Energy Saving of Ukraine, International Finance Corporation

The market is dominated by the "manufacturer-trader" model. The vast majority of market participants are engaged in the production of chips, pellets and briquettes and supply their products directly to end-users.

There are few powerful players specializing in a specific activity, in particular raw material procurement (due to market opacity) and biomass heat producers. There are also no large companies which dominate on the market. The vast majority of biofuels manufacturers are moving upstream along the value chain – trying to control access to raw materials. To move down the chain (before heat production) requires additional funds.

Sources of biomass are divided into three main groups: wood fuel, fuel based on agricultural waste and municipal and industrial waste (Tab. 3.27).

Forestry and woodworking industries produce wood, which is the largest source of solid biomass. The sector covers a significant amount of different types of biomass with different characteristics – wood logs and cod, bark, sawdust.

In agricultural sector for energy purposes can be used by-products from the cultivation of traditional crops such as rape, wheat, corn, and specialized energy crops – poplar, willow, miscanthus and others. Another significant source of biomass is the animal and communal waste that can be used to produce solid biofuels and biogas.

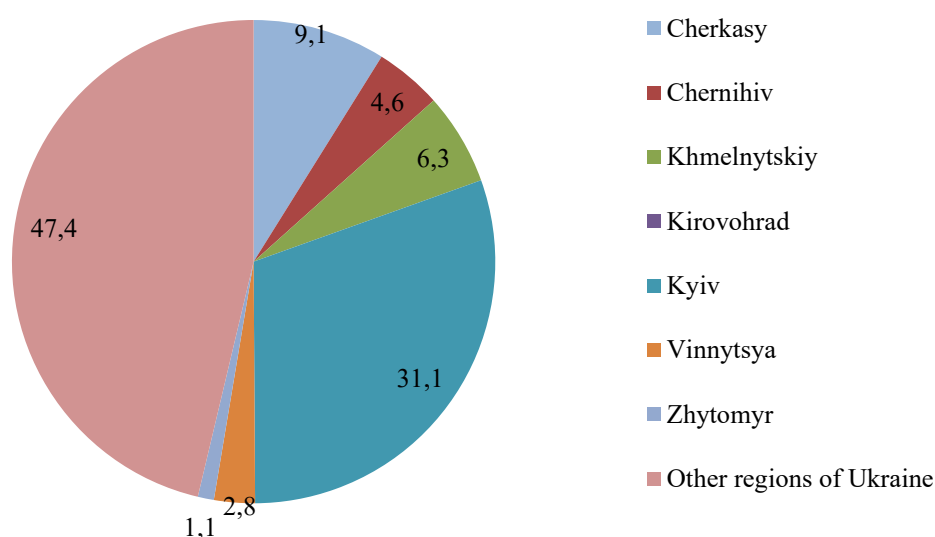
Table 3.27. Biomass Classification

Origin	Type of raw material	Processing products
Wood fuel	Wood, waste wood, secondary wood, renewable wood	Solid: Raw wood, sawdust cod, granules
		Liquid: black meadow, methanol, pyrolysis resins
		Gaseous: gasification and pyrolysis products
Agro fuels	Agricultural waste animal husbandry, processing agricultural products, energy plants	Solid: straw, stems, husk, energy grasses
		Liquid: ethanol, methanol, pyrolysis resins, pulp, oils
		Gaseous: biogas, gasification and pyrolysis products
Waste	Municipal and industrial waste	Solid: household waste
		Liquid: drains, pyrolysis resins
		Gaseous: biogas from solid waste landfills, biogas from waste water

Source: USAID report "Preparation and implementation of natural gas biomass substitution projects for the production of heat energy in Ukraine" (2015)

Biodegradables include several types of waste such as organic solid waste fractions, sewage sludge, solid waste fuels, and so on. The most common options for the final energy use of biomass are projects on autonomous heating, energy efficiency in industry, waste utilization, and supply of thermal and electric energy.

7 Central Ukraine regions under study are very rich in the bioenergy companies. Electricity production using bioenergy methods in these regions accounts for about 54% of total in Ukraine.

**Fig. 3.41. Electric capacity of biomass energy producers in 2018, MW**

Source: State Statistic Committee of Ukraine

Wood fuel production and consumption

Central Ukraine regions are less afforested than western part of Ukraine. Due to this reason the resource for solid fuel production is smaller. Average afforestation was 15.9% for Ukraine in 2018.

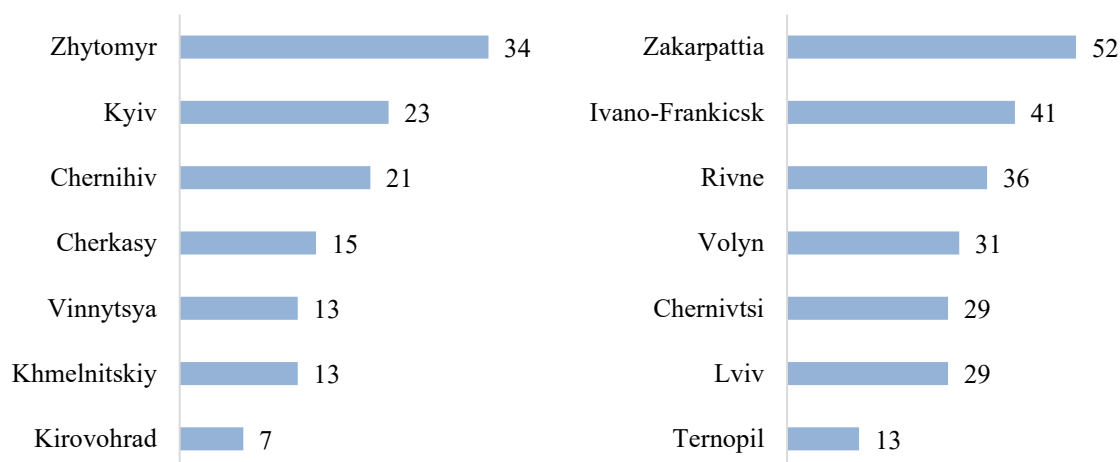


Fig. 3.42. Afforestation in Central Ukraine in comparison to West Ukraine, %

Sources: State Agency of Forest Resources Ukraine, Information about afforestation in Ukraine (september 2018)

It should be noted that growing energy crop for biomass manufacturing is a relatively new business trend in Ukraine. It develops rapidly – new players appear in this segment every year. First of all, this is due to the fact that woodworking companies are starting to use wood waste for their own needs, or independently produce biofuels for sale. Manufacturers of pellets, briquettes and energy service companies are forced to look for new opportunities to maintain their production capacity.

Most of the pellet and briquetting factories are located in Kyiv region. The quantity of producers is changing due to the market conditions. Table 3.28 provides solid biofuel producers by regions.

Table 3.28. Number of producers of pellets and briquettes*

Solid fuel by kind	Kyiv	Vinnytsia	Cherkasy	Khmelnytsk yii	Zhytomyr	Chernihiv	Kirovohrad	Total
Peat briquettes	21	1	0	2	3	2	1	30
Fuel briquettes	82	13	17	7	25	13	15	172
Charcoal	38	3	6	10	4	5	5	71
Wood	46	5	7	5	9	7	5	84
Wood pellets	104	10	17	6	16	15	2	170
Pellets from the husk	37	7	6	0	2	4	7	63
Straw pellets	21	6	5	2	25	0	1	60
Pellets from peat	13	1	0	0	25	0	0	39
Chips, sawdust, waste	32	7	7	4	12	2	3	67
Total	394	53	65	36	121	48	39	-

* - Most of the companies produce several kinds of fuel at the same time.

Source: Scientific Engineering Centre "Biomass" Ltd. (SECB), "Ukrbio" Ltd

Currently, pellet and briquettes producers utilize less than 10% of the technical potential of agrarian and forest biomass in the region.

About 85% of the products are made from wood raw materials. It is mainly wood processing waste.

Due to the economic situation, an increasing number of municipal combined heat and power projects (CHP projects) are being implemented from year to year.

Table 3.29. Existing biomass TPPs/CHPs *

Company (in English)	Company (in Ukrainian)	Region	Source of energy	Capacity, MW
“Smilaenergopromtrans” ltd	ТОВ “Смілаенергопромтранс”	Cherkasy	Wood chips	8.5
“EcoTec” Biogasenergo	Біогазнерго, “ЕкоТес”	Kyiv	Wood chips	18
“Green Energy”	ТОВ “Зелена енергія”	Kyiv	Wood chips; peat	10.5
“Yugenergopromtrans” ltd	ТОВ “Югенергопромтранс”	Kyiv	Wood chips	5
K-Podilska “Miskteplovodenergia”	Реконструкція КП “Міськтепловоденергія”	Khmelnyskiy	Wood chips	1.4
K-Podilska “Miskteplovodenergia”	Нове будівництво КП “Міськтепловоденергія”	Khmelnyskiy	Wood chips; corn silage; straw	4
Vinnytsia City Council	Вінницька міська рада	Vinnytsia	Wood chips	5.2
PJSC “Kropyvniyskiy Oil extracting factory”, CHP	ПрАТ “Кропивницький ОЕЗ”, м. Кропивницький	Kirovohrad	Sunflower husk	1.7
LLC “Claire Energy”, Koryukivskaya TPP	Компанія “Кліар енерджі”, Корюківська ТЕС	Chernihiv	Wood chips	3.5
Total				54.3

*– Including plants commissioned in 2019

Source: All-Ukrainian Sustainable Development & Investments Agency, Bioenergy Association of Ukraine

Production energy from agro biomass

The agricultural sector in bioenergy is potentially one of the most attractive in Ukraine. The table below shows the volume of harvesting by major agricultural crops in the regions under study. Overall yield, although fluctuating, shows a positive trend.

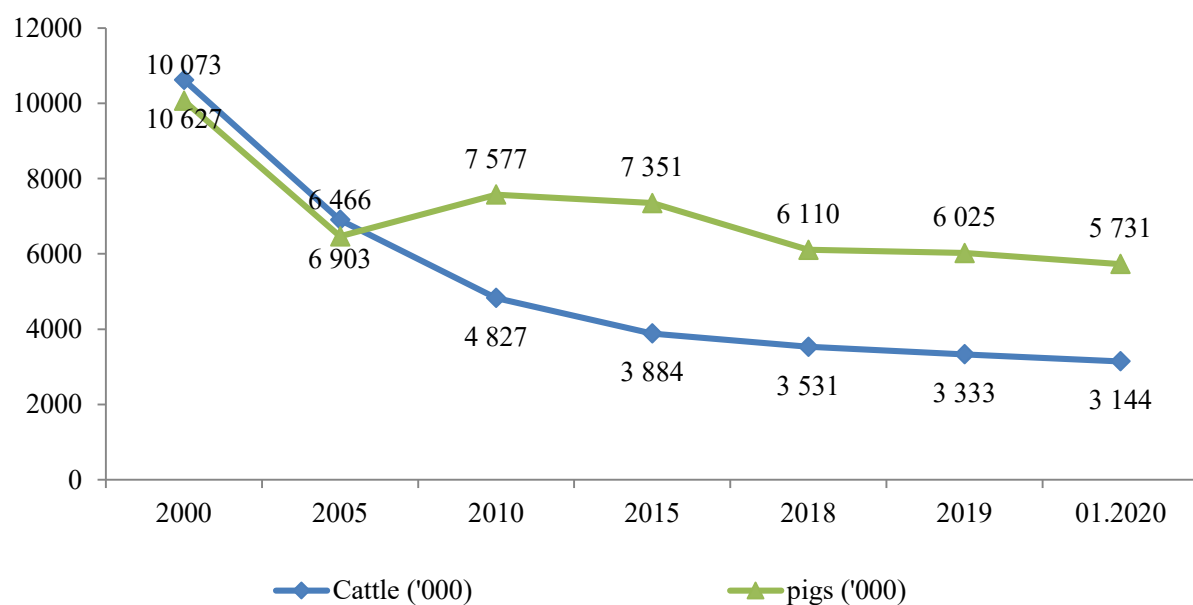
According to the data of Bioenergy Association of Ukraine (UABIO) the average actual percentage of use of agro biomass (waste from the fields) is 11.5%. Theoretical calculations give the value at least 40-50%.

Table 3.30. Harvesting by major agriculture crops in Central Ukraine regions at 1/11/2019 in thous. tons

Crop	Ukraine	Zhytomyr	Chernihiv	Kirovoh rad	Kyiv	Cherkasy	Vinnytsia	Khmelnyskyi
Cereal and leguminous crops	69 136	2 063	4 002	4 107	3 645	4 023	5 445	3 429
Wheat	28 850	693	864	1 443	1 019	1 096	1 867	1 455
Corn	29 160	1 075	2 894	2 142	2 183	2 640	3 032	1 452
Barley	9 136	108	117	447	358	235	500	76
Other cereals and legumes	1 990	186	126	76	85	52	45	445
Feed corn	5 358	128	373	132	330	520	354	451
Oilseed crops								
Soya	3 497	277	182	174	272	203	276	460
Winter rapeseed and colza	3 303	125	84	153	146	145	243	241
Sunflower	14 923	272	620	1 510	488	637	826	513
Factory sugar beet	7 049	541	206	221	688	221	1 290	932

Source: State Statistic Committee of Ukraine

In addition to the use of agricultural waste as solid biofuel, farm waste can also be used as a fuel source. However, it should be noted that the total number of cattle and pigs has been negatively trending in Ukraine for a long time.

**Fig. 3.43. Cattle and pigs in 2000-2020 in Ukraine, thousand heads**

Source: State Statistic Committee of Ukraine

Table 3.31 provides a list of biogas plants active in agriculture in Central regions.

Table 3.31. Biogas plants active in agriculture

Company (in English)	Company (in Ukrainian)	Region	Source of energy	Capacity, MW
Rokytno sugar factory	ТОВ "Рокитнянський цукровий завод"	Kyiv	Sugar beet pulp, sorghum silo	2.382
Farm, Krupil	с/г ферма, с. Крупіль	Kyiv	Farm manure drains	0.635
"Ukrainian milk company" ltd	ТОВ "Українська молочна компанія"	Kyiv	Farm manure drains, silage	0.955
Group of companies "Ecodevelop"	Група компаній "Екодевелоп"	Kyiv	Farm manure drains, corn silage	0.33
"Gorodyshe- Pustovary sugar factory" OJSC	ВАТ "Городище-Пустоварівський цукровий завод"	Kyiv	Sugar beet pulp	2.4
"Terezyo" ltd	ТОВ "Терезино"	Kyiv	Farm manure drains	0.25
"Specgasremtechnology" ltd	ТОВ "Спецгазремтехнологія"	Kyiv	Different wastes	1.0
"Yuzefo-Mykolayivska biogas company" ltd	ТОВ "Юзефо-Миколаївська біогазові компанія"	Vinnytsia	Sugar beet pulp, agriculture wastes	3
"Myronivskiy Khiboproduct" PJSC	ПАТ "Миронівський хлібопродукт"	Vinnytsia	Chicken litter	12
"Teofipolska energy company" Ltd	ТОВ "Теофіпольська енергетична компанія"	Khmelnysky	Sugar beet pulp, farm manure drains, agriculture wastes	25.6
"Gorodyshe-Pustovarivska agrocompany", ltd	ТОВ "Городище - Пустоварівська аграрна компанія", с. Линовиця	Chernihiv	Sugar beet pulp	2.4
"Gals-Agro", ltd	Агрохолдинг "Галс-Агро" на базі ТОВ "Журавка" с. Журавка Чернігівської області	Chernihiv	Pig farm manure	1.2
Total				52.152

Source: All-Ukrainian Sustainable Development & Investments Agency, Bioenergy Association of Ukraine

Biofuel consumption

Bioethanol is an alcohol made by fermentation, mostly from carbohydrates produced in sugar or starch crops such as corn, sugarcane, or sweet sorghum. Cellulosic biomass, derived from non-food sources, such as trees and grasses, is also being developed as a feedstock for ethanol production. Ethanol can be used as a fuel for vehicles in its pure form, but it is usually used as a gasoline additive to increase octane and improve vehicle emissions.

Barriers exist mainly on policy level, in terms of unfavourable legislation for example in terms of bioethanol production. High excise taxes make bioethanol production unprofitable for example. (Trends and developments in the renewable energy sector in Ukraine).

Total capacity of bioethanol production in Ukraine is 200 thousand tons per year (near 20 enterprises). More than half of the capacity (123 thousand tons / year) belongs to the state-owned enterprise "Ukrspyr", located on 8 distilleries in 7 regions of Ukraine.

According to official information there are 10 factories in the structure of the Ukrspyr Concern that are equipped for the bioethanol production. In terms of privatization it may be

interesting for potential investors². As mentioned in the Privatization Strategy of Ukrspirt the auction could be started in May-June 2020.

According to the State Agency for Energy Efficiency and Energy Saving, the annual technically feasible energy potential of the production of liquid biofuels in Ukraine, excluding the capacity of sugar factories, is about one million tons.

Ukraine has a commitment to the EU under the EU-Ukraine Association Agreement on the implementation of the 28th EU Directive. In accordance with the Directive, Ukraine should achieve 10% of energy from renewable sources in the transport sector in 2020.

Nowadays there is no effective system in Ukraine to ensure traceability of motor fuels at all stages of the life cycle and to avoid any potential fraud. Its absence leads to a significant amount of “grey” segment of the market of motor fuels and low quality of production.

The existing state support instruments used in Ukraine are ineffective. Thus, the level of taxation of alternative and traditional fuels does not create sufficient incentives to increase the consumption of motor biofuels. Targeted government grant programs and public procurement policies for motor biofuels do not apply.

The Figure below demonstrates major problems and opportunities for biofuel production.

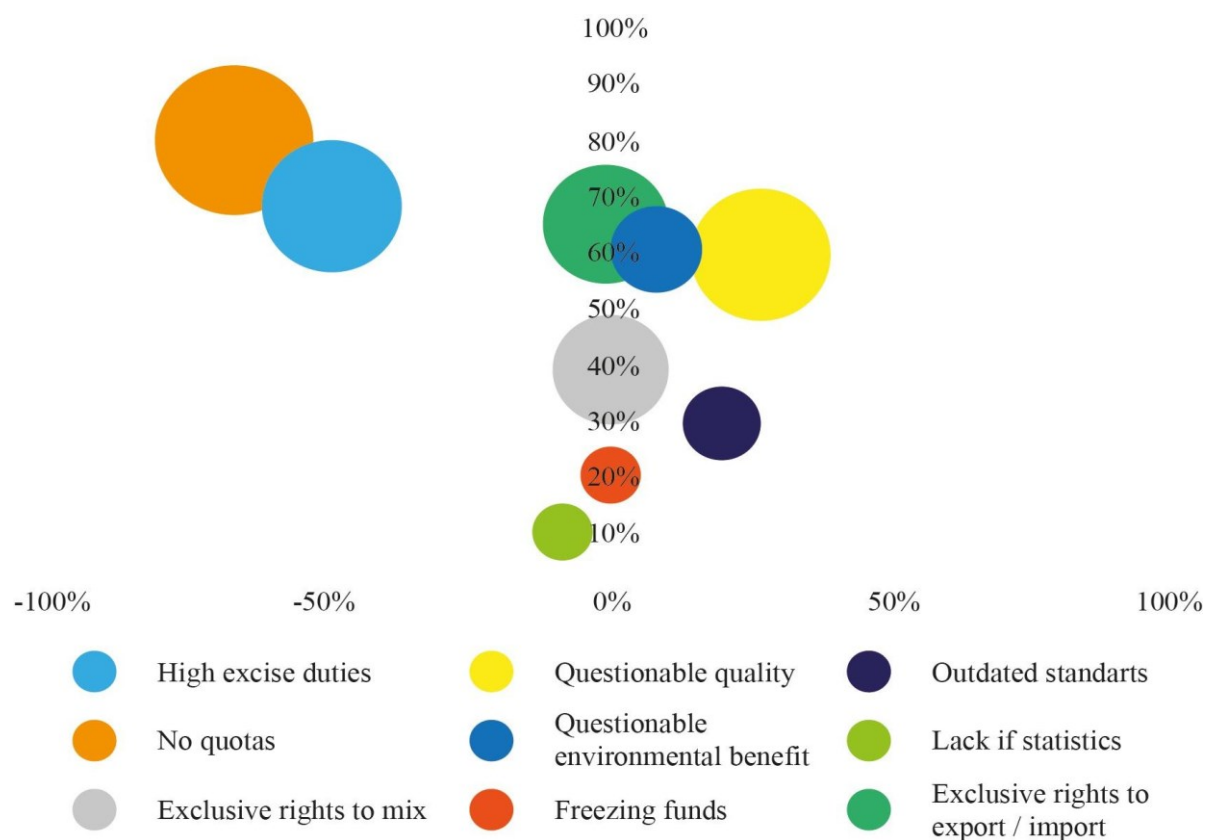


Fig. 3.44. Problems in bioenergy sector

Source: Ukrainian Association of Alternative Transport Fuels Manufacturers

² Privatization Strategy of Ukrspirt SE (http://ukrspirt.com/uploadfiles/admin/preza_3_4.pdf)

Table 3.32. Domestic production and foreign trade of liquid biofuels, thousand tonnes

Indicator	2013	2014	2015	2016	2017	2018
Production	66	26	16	6	21	4
Export	-	-	9	6	4	4
Import	–	38	46	58	54	56
Domestic consumption	66	64	53	58	71	56

Source: State Statistic Committee of Ukraine, “Annual Energy Balance of Ukraine (by products)”

In the studied regions, there are three bioethanol producers. Because of mentioned problems 2 companies are already have started bankruptcy procedures.

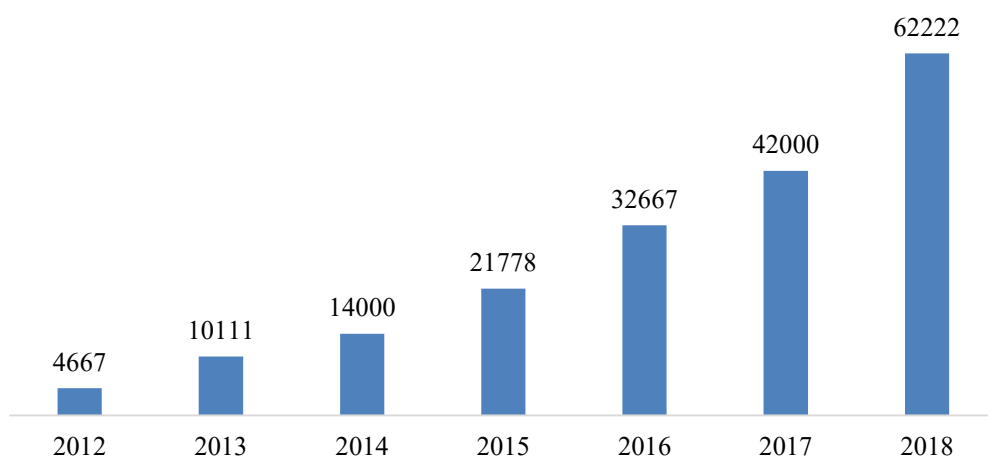
Table 3.33. Bioethanol producers

Company (in English)	Company (in Ukrainian)	Region	Notes	Capacity, tons
Barskiy alcohol factory, state company	ДП “Барський спиртовий комбінат”	Vinnytsia	bankruptcy proceedings have been initiated.	16 800
Gaysinsky alcohol factory, state company	ДП “Тайсинський спиртзавод”	Vinnytsia	bankruptcy proceedings have been initiated. Owner -Ukrspirt	16 800
Uzinskiy sugar plant, an additional liability company	ТДВ “Узинський цукровий комбінат”	Kyiv	Main activity – sugar production	7 200
Total				40 800

Source: Ukrainian Association of Alternative Transport Fuels Manufacturers

Waste: Landfill gas plants

Total installed electrical capacity at landfills is over 18.4 MW (as of 01.01.19). The development of electricity generation from MSW biogas for the period 2012 - 2018 is shown in Figure below.

**Fig. 3.45. Biogas Production at Landfills in Ukraine, MW*h**

Source: Bioenergy Association of Ukraine

In addition, Table 3.34 shows the total installed electric capacity and the number of biogas collection systems at the end of the year for the same period. The presence of a green tariff has led

to the fact that a significant part of the biogas energy potential at landfills and landfills of Ukraine has already been realized. A characteristic feature is that only Ukrainian companies are present in the local market.

Table 3.34. Electricity production, installed capacity and number of biogas projects at landfills in Ukraine

Year	Electricity production during the year, Mw*h	Electricity installed at the end of the year, MW	Electricity installed at the end of the year
2012	4 997	0.9	1
2013	10 299	2.1	3
2014	14 243	4.3	4
2015	21 926	6.4	6
2016	32 792	7.4	7
2017	41 065	12.3	12
2018	62 490	18.4	20

Source: Bioenergy Association of Ukraine

An analysis of the operational data for electricity generation for 2017 - 2018 shows that the average installed capacity utilization rate (CFCU) is 40 to 60 % (70% for the most successful projects), which may be associated with high expectations for gas generation at the project preparation stage.

The Table 3.35 illustrate landfill gas projects in studied regions.

Table 3.35. Landfill gas projects active *

Company (in English)	Company (in Ukrainian)	Region	Source of energy	Capacity, MW
“LNK” ltd	ТОВ “ЛНК”, с. Руська Поляна, полігон ТПВ	Cherkasy	Solid waste landfill	0.6
“LNK” ltd	ТОВ “ЛНК”, с. Глибоке, полігон ТПВ	Kyiv	Solid waste landfill	1.063
“LNK” ltd	ТОВ “ЛНК”, Київ, полігон №5 ТПВ	Kyiv	Solid waste landfill	2.126
“LNK” ltd	ТОВ “ЛНК”, с. Рожевка (Бровари)	Kyiv	Solid waste landfill	0.885
“Ecovin” and “AUE Energo” ltd	СП “АЕУ” та КУП “Ековін”	Vinnytsia	Solid waste landfill	0.999
Biogas Energy, ltd	ТОВ “Біогаз Енерджі”	Khmelnyskyi	Solid waste landfill	0.659
Municipal project of International center of the Gas Technology	Міжнародний центр Газових Технологій за участю інституту газу НАН України	Khmelnyskyi	Solid waste landfill	0.5
LNK, ltd	ТОВ “ЛНК”, с. Оліївка	Zhytomyr	Solid waste landfill	1.063
Clear-Energy-Chernihiv	м. Чернігів, Чернігівська електростанція на біогазі	Chernihiv	Solid waste landfill	1.131
Total				9.026

*– Including plants commissioned in 2019

Source: All-Ukrainian Sustainable Development & Investments Agency, Bioenergy Association of Ukraine

Market development trends

Government documents for bioenergy have ambitious plans: reach 5 million tonnes. e. per year in heat production by 2020 and 11 million tonnes. e. per year - in the supply of primary energy until 2035. The share of bioenergy in the overall balance of primary energy supply in 2035 should be 11.4%. This gives good potential opportunities but there are some factors that may increase payback periods and decrease financial attractiveness for such projects.

Opportunities for sector development:

- there is a significant market space for new players. The existing raw material potential is not sufficiently used by the present market participants;
- the presence of a large area of degraded land unsuitable for agriculture in the region under study creates the preconditions for faster development of the biofuel segment of energy plants;
- foreign investors, in particular European ones, can make a significant impetus for the development of the Ukrainian biofuels market through the transfer of managerial know-how and technological solutions;
- decentralization processes, community's funds growth and the need for energy savings will stimulate demand for bioenergy solutions at the local level;
- the interest of communities in public-private partnerships with energy service companies will grow. Utility companies will become more important players in the market – demand for biofuels from them will grow;
- private companies with a transparent mechanism of public-private partnership will have market benefits.

Obstacles to development:

- non-transparent rules for access to logging waste – on contract or through auctions – increase the risk of corruption for market participants;
- non-transparent rules on access to community-based heat supply contracts also raise the risk of corruption for market participants;
- the sector is partially operating in the shadows, and market participants have limited experience in developing business processes and establishing corporate governance that restrains access to capital and integration into relevant EU markets;
- the government plans to reduce the “green tariff” – a mechanism for stimulation in the bioenergy sector. It could lead to reducing NPV and increasing payback periods.

Potential investment projects

The major planned bioenergy plant is in the Khmelnytskyi region. It's planned electro capacity to produce is over 50 MW.

Also, according to the latest news the European Bank for Reconstruction and Development (EBRD), together with the Global Environment Facility (GEF), is going to finance a € 55.8 million program to support bioenergy development.

It was announced a privatisation for “Ukrspyr” (planned to be finished up to the July 2021) which can be potentially interesting for bioethanol producers.

Detailed information on the development or implementation of a specific investment project can be obtained from representatives of the Department of Investment in Renewable Energy, the State Agency for Energy Efficiency and Energy Saving of Ukraine:

tel. +38 (044) 292-70-95

e-mail: dilovod.agentstvo@gmail.com

3.6. Production of machinery, equipment, materials for agro-food and horticulture sectors

In 7 Central Ukrainian regions under investigation there are 75 producers of equipment and components for agro-sectors and bioenergy energy production, namely:

- 24 agricultural soil machinery producers;
- 10 agricultural self-loading or unloading trailers and semi-trailers producers;
- 7 root harvesting machines;
- 6 fertilizers producers;
- 5 seeders, planters and transplanters producers;
- 5 machinery for preparing animal feeding stuffs producers;
- 5 manure spreaders and fertiliser distributors producers;
- 4 pesticides producers;
- 3 tractors producers;
- 2 machinery for projecting, dispersing or spraying liquids or powders for agriculture or horticulture producers;
- 2 mowers producers;
- 1 milking machines producer;
- 1 other harvesting and threshing machinery producer;

At the same time, the indicated producers are small in production volume (except for mineral fertilizers), and therefore their market share is insignificant.

Table 3.36 Production of machinery, equipment, materials for agro-food and horticulture sectors

Subsector	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	Total
Agricultural soil machinery	3	1	7	1	6	5	1	24
Fertilizers	4				1		1	6
Machinery for preparing animal feeding stuffs	1				1	2	1	5
Machinery for projecting, dispersing or spraying liquids or powders for agriculture or horticulture					2			2
Manure spreaders and fertiliser distributors	1			1	2	1		5
Milking machines						1		1
Mowers		1		1				2
Other harvesting and threshing machinery					1			1
Pesticides					3		1	4
Root or tuber harvesting machines	1		3		2		1	7
Seeders, planters and transplanters			2	2		1		5
Self-loading or unloading trailers and semi-trailers for agriculture	2	2	5	1				10
Tractors	1	1	1					3
Total	13	5	18	6	18	10	5	75

Table 3.37. Producers of machinery, equipment, materials for agro-food, horticulture and bioenergy sectors

Product	ID code	Company name (English)	Company name (Ukrainian)	Region
Agricultural soil machinery	68104	Приватне підприємство “Укрос-Агро”	Ukros-Agro Private Enterprise	Khmelnyskiy
	235750	ПАТ “Хмільниксільмаш”	Khmilnyksilmash PJSC	Vinnytsia
	236062	ПАТ “Кам'янець-Подільськсільмаш”	PJSC “Kamianets-Podilskilmash”	Khmelnyskiy
	238167	ПАТ “Новоград-Волинський Завод Сільгоспмашин”	PJSC “Novograd-Volynsky Agricultural Plant”	Zhytomyr
	240135	ПАТ “Ірпінмаш”	Irpinmash PJSC	Kyiv
	901329	БАТ “Калинівський Ремонтно-Механічний Завод”	OJSC “Kalinivsky Repair and Mechanical Plant”	Vinnytsia
	901695	ПрАТ “Виробниче Об'єднання “Восход”	PJSC “Production Association” Voskhod “	Cherkasy
	902501	ТОВ “Краснянське Спеціалізоване Підприємство “Агромаш”	“Krasnyansk Specialized Enterprise” Agromash “LLC	Vinnytsia
	3057934	ПрАТ “Промінь”	PJSC “Promin”	Cherkasy
	3744178	ПрАТ “Богуславська Сільгосптехніка”	JSC “Boguslav Agricultural Equipment”	Kyiv
	5454088	ТОВ “Вінницький експериментально-механічний завод”	LLC “Vinnytsia Experimental-Mechanical Plant”	Vinnytsia
	5765888	ПрАТ “Уманьферммаш”	PJSC “Umanfermmash”	Cherkasy
	5784437	ПАТ “Ельворті”	Elvorti PJSC	Kirovohrad
	21318858	ПрАТ “Нива”	PJSC “Nyva”	Khmelnyskiy
	21322535	Відокремлений підрозділ Волочиський машинобудівний завод ПАТ “Мотор Січ”	Volochysk Machine Building Plant of PJSC “Motor Sich”	Khmelnyskiy
	21396775	ТОВ “Виробничо-Торговельне Підприємство “Бравалур”	“Production and Trading Enterprise” Bravalur” LLC “	Chernihiv
	30221510	Споживче товариство Виробнича Фірма “Агрореммаш”	Consumer Society Production Company “Agroremmash”	Kyiv
	31250689	Приватне Підприємство “Зевс”	Zeus Private Enterprise	Vinnytsia
	31907458	ТОВ Науково-Виробниче Підприємство “Білоцерківмаз”	“Belotserkivmaz” Scientific and Production Enterprise LLC	Kyiv
	33526433	ТОВ “ППМ-Спецтехніка”	“PPM-Special equipment” LLC	Khmelnyskiy
	33679183	ТОВ “Грунтех”	Gruntech LLC	Kyiv
	36719878	ТОВ “Завод “Красилівмаш”	LLC “Krasilivmash Plant”	Khmelnyskiy
	37865864	ТОВ Інноваційне Сільськогосподарське Машинобудування “Промінь”	Innovative Agricultural Machinery “Promin” LLC	Kyiv
	37921017	ТОВ “Дювельсдорф Україна”	Duveelsdorf Ukraine LLC	Khmelnyskiy
Self-loading or unloading trailers and semi-trailers for agriculture	68104	Приватне підприємство “Укрос-Агро”	Ukros-Agro Private Enterprise	Khmelnyskiy
	5765888	ПрАТ “Уманьферммаш”	PJSC “Umanfermmash”	Cherkasy
	14312565	ПАТ “Ніжинський механічний завод”	PJSC “Nizhyn Mechanical Plant”	Chernihiv
	30456416	ТОВ “Агромоторсервіс”	LLC “Agromotorservice”	Khmelnyskiy

Product	ID code	Company name (English)	Company name (Ukrainian)	Region
	32507006	ТОВ "НМТ-Агро"	"NMT-Agro" LLC	Khmelnyskiy
	33526433	ТОВ "ПІМ-Спецтехніка"	"PPM-Special equipment" LLC	Khmelnyskiy
	34548222	ТОВ "Профі Стан"	Profi Stan LLC	Kirovohrad
	36459962	ТОВ "Виробниче Підприємство "Пожспецмаш"	LLC "Production Enterprise" Pozhspetsmash "	Chernihiv
	36719878	ТОВ "Завод "Красилівмаш"	LLC "Krasilivmash Plant"	Khmelnyskiy
	37239718	ТОВ "Машинобудівна Компанія "Тот-Стайл"	Tot-Style Machine Company LLC	Cherkasy
Root or tuber harvesting machines	68104	Приватне підприємство "Укрос-Агро"	Ukros-Agro Private Enterprise	Khmelnyskiy
	238167	ПАТ "Новоград-Волинський завод сільгоспмашин"	PJSC "Novograd-Volyn Agricultural Machinery Plant"	Zhytomyr
	5748938	ПАТ "Старокостянтинівський завод ковальсько-пресового устаткування"	PJSC "Starokostiantynivsky Forging and Press Equipment Plant"	Khmelnyskiy
	5765888	ПрАТ "Уманьферммаш"	PJSC "Umanfermmash"	Cherkasy
	23244621	Приватне Підприємство Фірма "Гіпрон"	Private Enterprise Firm "Gipron"	Kyiv
	33679183	ТОВ "Грунттех"	Gruntech LLC	Kyiv
	36719878	ТОВ "Завод "Красилівмаш"	LLC "Krasilivmash Plant"	Khmelnyskiy
Fertilizers	203826	ПАТ "Азот"	PJSC "Azot"	Cherkasy
	19417174	ТОВ Фірма "Цеоліт"	LLC Zeolite Company	Kyiv
	24698867	Дочірнє підприємство "Олевськторф" державного підприємства "Житомирторф"	Subsidiary enterprise "Olevstorf" of the state enterprise "Zhytomyrortf"	Zhytomyr
	31489809	ПрАТ "Еко-Азот"	JSC "Eco-Nitrogen"	Cherkasy
	36771943	ТОВ "Фрея-Агро"	Freya-Agro LLC	Cherkasy
	36779743	ТОВ "Смілянська Агрохімічна Компанія"	Smila Agrochemical Company LLC	Cherkasy
Seeders, planters and transplanter	68104	Приватне підприємство "Укрос-Агро"	Ukros-Agro Private Enterprise	Khmelnyskiy
	901329	ВАТ "Калинівський Ремонтно-Механічний Завод"	OJSC "Kalinovsky Repair and Mechanical Plant"	Vinnitsia
	5784437	ПАТ "Ельворті"	Elvorti PJSC	Kirovohrad
	30456416	ТОВ "Агромоторсервіс"	LLC "Agromotorservice"	Khmelnyskiy
	31276162	Приватне Підприємство "Ремсинтез"	Remsynthesis Private Enterprise	Kirovohrad
Machinery for preparing animal feeding stuffs	238167	ПАТ "Новоград-Волинський Завод Сільгоспмашин"	PJSC "Novograd-Volynsky Agricultural Plant"	Zhytomyr
	5765888	ПрАТ "Уманьферммаш"	PJSC "Umanfermmash"	Cherkasy
	14313398	ПАТ "Могилів-Подільський машинобудівний завод"	Mogyliv-Podilsky Machine Building Plant PJSC	Vinnitsia
	30453792	ТОВ "Юга-Сервіс"	Yugo-Service LLC	Vinnitsia
	32412391	ТОВ "Княжа Авіла"	"Kniazha Avila" LLC	Kyiv
Manure spreaders and fertiliser distributors	235750	ПАТ "Хмільниксільмаш"	Khmilnyksilmash PJSC	Vinnitsia
	3744178	ПрАТ "Богуславська Сільгосптехніка"	JSC "Boguslav Agricultural Equipment"	Kyiv
	5765888	ПрАТ "Уманьферммаш"	PJSC "Umanfermmash"	Cherkasy
	5784437	ПАТ "Ельворті"	Elvorti PJSC	Kirovohrad
	31907458	ТОВ Науково-Виробниче Підприємство "Білоцерківмаз"	"Belotserkivmaz" Scientific and Production Enterprise LLC	Kyiv

Product	ID code	Company name (English)	Company name (Ukrainian)	Region
Pesticides	32325	ПП НВП “Агроенергетичні Технології”	Agroenergy Technologies NPP	Kyiv
	479617	ПАТ “Біоветфарм”	Biovetpharm PJSC	Zhytomyr
	24889774	Плахтянська філія ПрАТ “ВНП “Укрзооветпромпочастач”	Plakhtyansk branch of JSC “GNP” Ukrzooveprompostach “	Kyiv
	32137981	ТОВ “Мікотон-Агліконт”	Mikoton-Aglikon LLC	Kyiv
Tractors	68104	Приватне підприємство “Укрос-Агро”	Ukros-Agro Private Enterprise	Khmelnyskiy
	26254719	Філія “Тракторний завод” ТОВ “Укравтозапчастина”	Branch “Tractor Plant” LLC “Ukravtozapchast”	Chernihiv
	37239718	ТОВ “Машинобудівна компанія “Тот-Стайл”	Tot-Style Machine Company LLC	Cherkasy
Machinery for projecting, dispersing or spraying liquids for agriculture or horticulture	3744178	ПрАТ “Богуславська Сільгосптехніка”	JSC “Boguslav Agricultural Equipment”	Kyiv
	31265469	Приватне Підприємство “Агротехніка”	Private Enterprise “Agrotechnics”	Kyiv
Mowers (including cutter bars for tractor mounting)	1033390	ПАТ “Ніжинський дослідно-механічний завод”	PJSC “Nizhyn Research and Mechanical Plant”	Chernihiv
	33423425	ТОВ “Завод Автоштамп”	Avtoshtamp Plant LLC	Kirovohrad
Milking machines	5768237	ТДВ “Брацлав “	“Bratslav” ALC	Vinnytsia
Other harvesting and threshing machinery	31907458	ТОВ Науково-Виробниче Підприємство “Білоцерківмаз”	“Belotserkivmaz” Scientific and Production Enterprise LLC	Kyiv

Export

In 2018, exports volume of machinery, equipment, materials for agro-food and horticulture sector products in 7 Central Ukrainian regions under investigation amounted to about USD 38.8 million, of which almost 47% was generated by Kirovograd region (USD 18.1 million).

Main foreign sales markets are Russia (46%), Moldova (18%) and Germany (10%).

Table 3.38. Exports volume of machinery, equipment, materials for agro-food and horticulture in 2018, thousand USD

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnyskiy	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Agricultural, horticultural or forestry machinery for soil preparation or cultivation	1 950	965	2 015	17 722	2 062	562	1 564	26 839
Agricultural, horticultural, forestry, poultry-keeping or bee-keeping machinery	1 767	10	148	12	884	354	598	3 772
Insecticides, rodenticides, fungicides, herbicides and similar products	1 458	19		4	2 037	88	6	3 612
Harvesting or threshing machinery	425	3	215	292	1 627	202	12	2 776
Tractors	220	72	4		214	17	7	535
Mineral or chemical fertilisers containing two or three of the fertilising elements nitrogen, phosphorus and potassium	249			89	122	63		523
Milking machines and dairy machinery	8	2	212		1	45		268

Product group	Regions							Total
	Cherkasy	Chernihiv	Khmelnytskyi	Kirovograd	Kyiv	Vinnytsia	Zhytomyr	
Mineral or chemical potassic fertilisers	147							147
Mineral or chemical nitrogenous fertilisers	73					59		132
Presses, crushers and similar machinery used in the manufacture of wine, cider, fruit juices						91		91
Animal or vegetable fertilisers	61							61
TOTAL	6 359	1 072	2 593	18 119	6 945	1 480	2 187	38 757

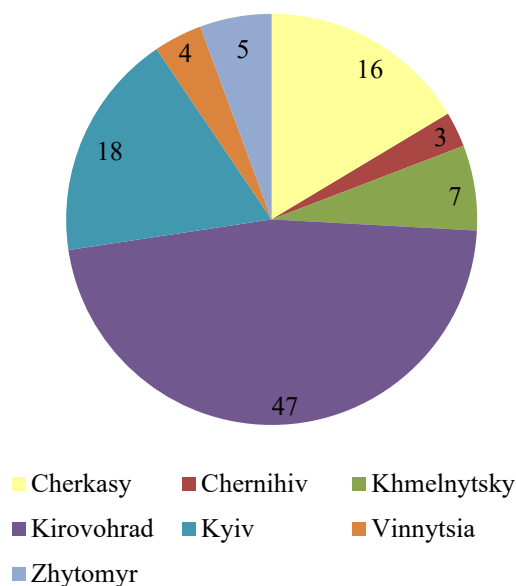


Fig. 3.46. Regional breakdown of exports of machinery, equipment, materials for agro-food and horticulture, %

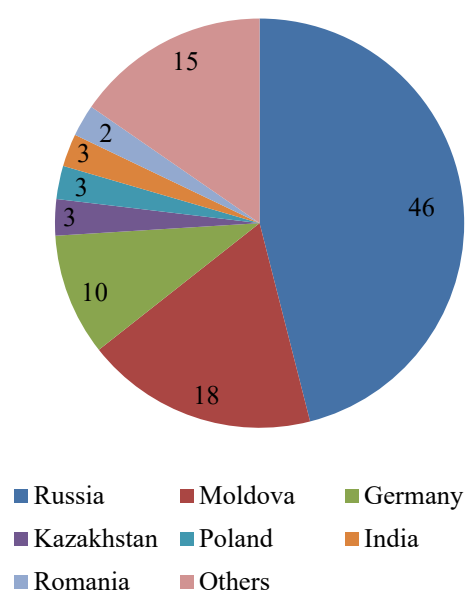


Fig. 3.47. Exports of machinery, equipment, materials for agro-food and horticulture by destinations, %

SWOT analysis of the sector

<p>S (strengths)</p> <ul style="list-style-type: none"> – Convenient geographic location close to metallurgical plants; – Availability of raw materials, namely metal products for agricultural machinery production; – Well-educated staff and strong engineering education; – Ability of Ukrainian producers to produce high-quality low-cost equipment for small agricultural producers 	<p>W (weaknesses)</p> <ul style="list-style-type: none"> – Low solvency of potential customers within the country; – Low percentage of legal entities with European certification; – High level of depreciation of fixed assets; – Lack of sound marketing strategy and marketing information; – Lack of domestic production of components for the agricultural machinery production; – Lack of effective tools to support Ukrainian manufacturers in the domestic and foreign markets
<p>O (opportunities)</p> <ul style="list-style-type: none"> – Opening of the land market; – Preferential access to European markets within the framework of the DCFTA agreement 	<p>T (threats)</p> <ul style="list-style-type: none"> – Ukrainian economic recession; – Labour migration; – Currency fluctuations; – Imports of used agricultural machinery; – Dumped imports of fertilizers

4. Sector “Joker”

The selection of the “joker sector” for each of the studied regions of Central Ukraine was made on the basis of regional specialization indicators. All manufacturing industry sectors that are not represented in the surveyed agro-food and industrial sectors (in chapters 2-3) were taken into account.

Regional specialization of Central Ukraine regions in different segments of manufacturing industry was calculated using the coefficient of specialization.

The coefficient of specialization measures the degree to which a local or a regional economic system specializes in one or more economic sectors compared to the regional or the national economy. It was calculated by the formula:

$$SQ = (S_{ig} / S_g) / (S_i / S),$$

where

SQ – coefficient of specialization

S_{ig} – sales revenue from the i -segment of the manufacturing industry in the g -region

S_g – sale of manufacturing industry products in the region

S_i – sales from the i -segment of the manufacturing industry in Ukraine

S – sales of manufacturing industry products in Ukraine

A value of $SQ > 1$ indicates the field of specialization in this segment of the processing industry and therefore it means that the sector in this region is more developed than in other regions.

The results of the calculations of the specialization coefficient for the selection of sectors are presented in the table.

As “joker sector” for each region was selected the industry with the highest value of the specialization coefficient, namely:

- Cherkasy region – manufacture of basic pharmaceutical products;
- Chernihiv region – manufacture of paper and paper products;
- Khmelnytskyi region – manufacture of electrical equipment;
- Kirovohrad region – manufacture of other machinery and equipment;
- Kyiv region – manufacture of paper and paper products;
- Vinnytsia region – manufacture of wood and wood products;
- Zhytomyr region – manufacture of wood and wood products.

Table 4.1. Calculation of regional specialization of Central Ukraine regions

NA CE code	Sector	Sales, bln. UAH								Share in manufacturing, %								Coefficient of specialization							
		Vi	Zh	Ky	Ki	Kh	Ck	Ch	UA	Vi	Zh	Ky	Ki	Kh	Ck	Ch	UA	Vi	Zh	Ky	Ki	Kh	Ck	Ch	
16	Manufacture of wood and wood products	3,3	6,4	2,9	0,5	0,7	1,7	2,2	54,6	4,9	16,2	2,5	1,9	2,4	2,5	6,8	2,8	1,7	5,7	0,9	0,7	0,8	0,9	2,4	
17	Manufacture of paper products	0,5	2,1	9,9	0,1	1,3	1,9	2,9	44,7	0,7	5,2	8,5	0,2	4,0	2,9	8,8	2,3	0,3	2,3	3,7	0,1	1,7	1,3	3,8	
18	Printing and reproduction of recorded media	0,2	0,1	1,6	0,2	0,1	0,4	0,1	17,7	0,2	0,3	1,4	0,7	0,3	0,6	0,3	0,9	0,3	0,3	1,5	0,8	0,3	0,6	0,4	
19	Manufacture of coke and refined petroleum products	0,0	0,0	3,2	0,0	0,0	0,0	1,5	117,3	0,0	0,0	2,8	0,0	0,0	0,0	4,5	6,1	0,0	0,0	0,5	0,0	0,0	0,0	0,7	
20	Manufacture of chemical products	1,8	1,3	2,8	0,7	0,4	5,8	0,5	79,2	2,6	3,3	2,4	2,6	1,2	9,0	1,4	4,1	0,6	0,8	0,6	0,6	0,3	2,2	0,3	
21	Manufacture of pharmaceutical products	0,9	0,9	2,7	0,0	0,2	3,4	0,0	34,7	1,2	2,2	2,3	0,1	0,6	5,3	0,0	1,8	0,7	1,2	1,3	0,1	0,4	2,9	0,0	
22	Manufacture of rubber and plastic products	1,0	0,7	12,1	0,4	2,8	0,5	0,6	60,7	1,5	1,7	10,3	1,6	8,7	0,8	1,9	3,1	0,5	0,6	3,3	0,5	2,8	0,2	0,6	
23	Manufacture of other non-metallic mineral products	1,2	5,5	11,9	1,2	5,3	2,8	0,8	106,3	1,8	13,9	10,2	4,8	16,8	4,3	2,4	5,5	0,3	2,5	1,9	0,9	3,1	0,8	0,4	
24	Manufacture of basic metals	0,8	1,2	3,3	2,9	1,6	0,1	0,0	428,2	1,1	3,1	2,8	11,1	4,9	0,1	0,1	22,1	0,1	0,1	0,1	0,5	0,2	0,0	0,0	
26	Manufacture of computer, electronic and optical products	0,4	0,1	1,4	0,0	0,5	0,5	0,2	17,4	0,5	0,2	1,2	0,0	1,5	0,7	0,7	0,9	0,6	0,2	1,4	0,0	1,7	0,8	0,8	
27	Manufacture of electrical equipment	1,0	0,1	2,7	1,0	2,4	0,3	0,5	43,6	1,4	0,2	2,3	3,9	7,5	0,4	1,6	2,2	0,6	0,1	1,0	1,8	3,3	0,2	0,7	
28	Manufacture of machinery and equipment n.e.c.	1,1	1,5	4,2	3,5	0,6	1,1	0,8	71,4	1,6	3,8	3,6	13,5	1,8	1,7	2,5	3,7	0,4	1,0	1,0	3,7	0,5	0,5	0,7	
29	Manufacture of motor vehicles, trailers and semi-trailers	0,7	0,9	2,5	0,1	0,4	1,8	1,4	28,6	1,1	2,3	2,1	0,3	1,4	2,7	4,3	1,5	0,7	1,5	1,4	0,2	0,9	1,8	2,9	
30	Manufacture of other transport equipment	0,0	0,9	0,7	0,1	0,5	0,0	0,1	50,0	0,0	2,2	0,6	0,3	1,6	0,0	0,3	2,6	0,0	0,8	0,2	0,1	0,6	0,0	0,1	
32	Other manufacturing	0,2	0,1	0,6	0,1	0,1	0,2	0,4	8,2	0,2	0,2	0,5	0,3	0,3	0,4	1,3	0,4	0,6	0,5	1,3	0,6	0,6	0,9	3,1	
33	Repair and installation of machinery and equipment	0,6	0,4	2,3	0,4	0,3	0,6	0,3	47,3	0,9	0,9	2,0	1,5	1,0	1,0	1,0	2,4	0,4	0,4	0,8	0,6	0,4	0,4	0,4	
C	MANUFACTURING	68,7	39,6	116,7	25,7	31,6	65,1	32,6	1938,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	1,0	1,0	1,0	1,0	1,0	1,0	1,0	

Descriptive information:

Vi	Vinnitsia region	Kh	Khmelnyskiy region
Zh	Zhytomyr region	Ck	Cherkasy region
Ky	Kyiv region	Ch	Chernihiv region
Ki	Kirovohrad region	UA	UKRAINE

Cherkasy region

Pharmaceutical industry in Cherkasy region is represented by 5 enterprises. The sector is employing 955 full-time employees.

In 2018, sectors sales volume amounted to about UAH 3 435 million.

Table 4.2. Characteristic of pharmaceutical industry in Cherkasy region in 2018

Indicator	Value
Number of companies, units	5
incl. legal entities	5
individual entrepreneurs	0
Sales, million UAH	3 435
incl. legal entities	3 435
individual entrepreneurs	0
Export, million USD	1
Share of exports in sales, %	0%
Employment, people	955

In 2018, the volume of pharmaceutical industry export in Cherkasy region amounted to about USD 0.6 million.

Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic use dominate in the commodity structure of exports (83% of total exports of the sector).

Main foreign sales markets are Moldova (47%), Belarus (32%) and Poland (17%).

Table 4.3. The volume of pharmaceutical products export in Cherkasy region in 2018

Product group	Value, thous USD	Share, %
Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic use, put up in measured doses	488	83
Wadding, gauze, bandages and the like, e.g. dressings, adhesive plasters, poultices, impregnated or covered with pharmaceutical substances or put up for retail sale for medical, surgical, dental or veterinary purposes	101	17
Total	589	100

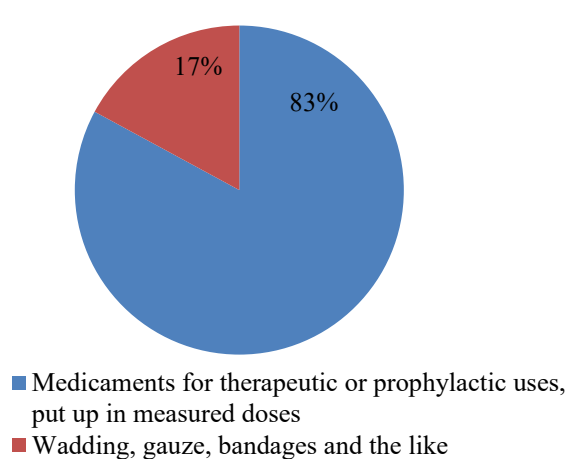


Fig. 4.1. Commodity structure of pharmaceutical products export in Cherkasy region

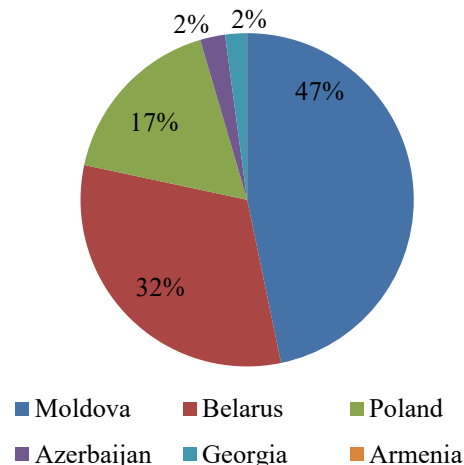


Fig. 4.2. Pharmaceutical products export by destinations in Cherkasy region

The main pharmaceutical companies in Cherkasy region are PJSC “Technolog”, Vitamins PJSC and PJSC “Monfarm”.

Table 4.4 Leading pharmaceutical companies in Cherkasy region

ID code	Company name (English)	Company name (Ukrainian)
14181442	PJSC “Technolog”	ПрАТ “Технолог”
480968	Vitamins PJSC	ПАТ “Вітаміни”
374870	PJSC “Monfarm”	ПАТ “Монфарм”
306756	Watfarm LLC	ТОВ “Ватфарм”
38031098	Pharma Cherkasy LLC	ТОВ “Фарма Черкас”

Chernihiv region

Paper products industry in Chernihiv region is represented by 31 enterprises, of which 19 are legal entities (61%), and 12 – individual entrepreneurs (39%). The sector is employing 1 546 full-time employees.

In 2018, sectors sales volume amounted to about UAH 2 863 million, of which UAH 2 853 million were generated by legal entities (almost 100%), and the rest UAH 10 million – by individual entrepreneurs (less than 1%).

Table 4.5. Characteristic of paper products industry in Chernihiv region in 2018

Indicator	Value
Number of companies, units	31
incl. legal entities	19
individual entrepreneurs	12
Sales, million UAH	2 863
incl. legal entities	2 853
individual entrepreneurs	10
Export, million USD	68
Share of exports in sales, %	65%
Employment, people	1 546

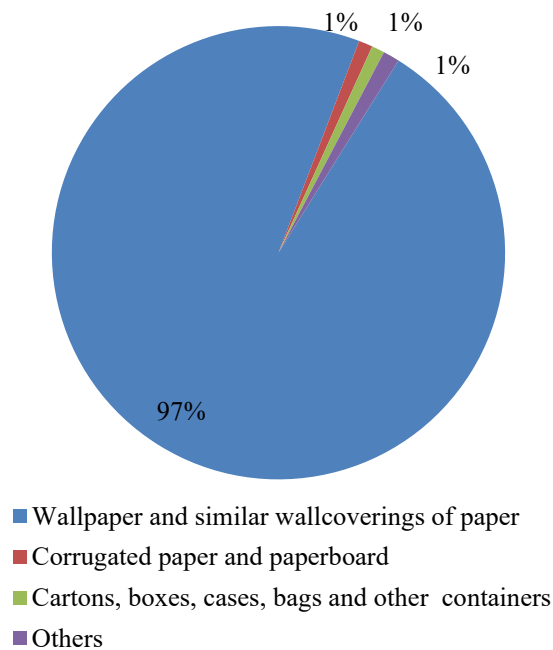
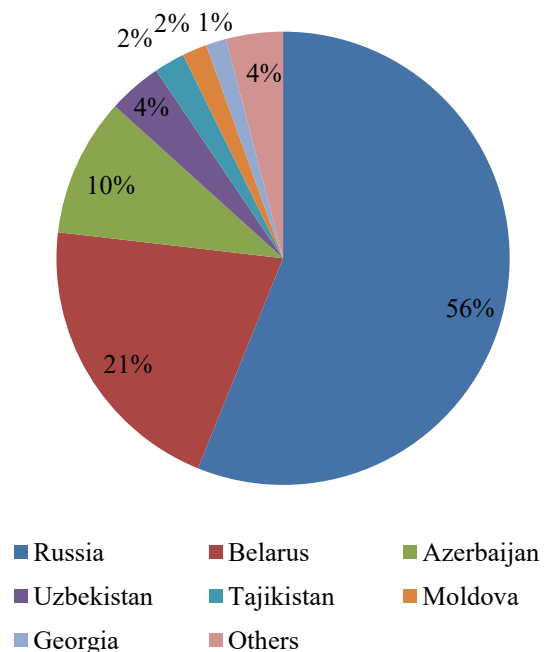
In 2018, the volume of paper products industry products export in Chernihiv region amounted to about USD 68.3 million.

Wallpaper and similar wallcoverings of paper dominate in the commodity structure of exports (97% of total exports of the sector).

Main foreign sales markets are Russia (56%), Belarus (21%) and Azerbaijan (10%).

Table 4.6. Volume of paper products industry export in Chernihiv region in 2018

Product group	Value, thous USD	Share, %
Wallpaper and similar wallcoverings of paper	66 212	97
Corrugated paper and paperboard	680	1
Cartons, boxes, cases, bags and other packing containers, of paper	626	1
Toilet paper and similar paper, cellulose wadding	503	1
Registers, account books, notebooks, order books, receipt books	111	0
Toilet or facial tissue stock, towel or napkin stock and similar paper for household or sanitary purposes	63	0
Paper, paperboard, cellulose wadding and webs of cellulose fibres, in strips or rolls of a width <= 36 cm,	55	0
Others	75	0
Total	68 326	100

**Fig. 4.3. Commodity structure of paper products industry export in Chernihiv region 2018,****Fig. 4.4. Paper products industry products export by destinations in Chernihiv region**

The main paper products industry companies in Chernihiv region are JSC “Slovyanski Shpalery – KFT”, PJSC “Mena Pak” and Amethyst LLC.

Table 4.7. Leading paper products industry companies in Chernihiv region

ID code	Company name (English)	Company name (Ukrainian)
278876	JSC “Slovyanski Shpalery – KFT”	ПрАТ “Слов’янські Шпалери-КФТП”
383260	PJSC “Mena Pak”	ПАТ “Мена Пак”
14221489	Amethyst LLC	ТОВ “Аметист”
22828432	“Star Plus” LLC	ТОВ “Фірма “Зірка Плюс”
2469511	“Chernihiv Cardboard and Printing Factory” LLC	ТОВ “Чернігівська картонажно-поліграфічна фабрика”

Khmelnyskiy region

Electrical equipment industry basic in Khmelnytskyi region is represented by 36 enterprises, of which 26 are legal entities (72%), and 10 - individual entrepreneurs (28%). The sector employs 1 784 full-time employees.

In 2018, sectors sales volume amounted to about UAH 2 365 million, of which UAH 2 363 million were generated by legal entities (99%), and the rest UAH 2 million – by individual entrepreneurs (1%).

Table 4.8. Characteristic of electrical equipment industry in Khmelnytskyi region in 2018

Indicator	Value
Number of companies, units	36
incl. legal entities	26
individual entrepreneurs	10
Sales, million UAH	2 365
incl. legal entities	2 363
individual entrepreneurs	2
Export, million USD	33
Share of exports in sales, %	37%
Employment, people	1 784

In 2018, the volume of electrical equipment industry export in Khmelnytskyi region amounted to about USD 32.5 million.

Electrical transformers and static converters dominate in the commodity structure of exports (80% of total exports of the sector).

Main foreign sales markets are Russia (77%), Italy (5%) and Germany (3%).

Table 4.9. The volume of electrical equipment export in Khmelnytskyi region in 2018

Product group	Value, thous USD	Share, %
Electrical transformers, static converters, e.g. rectifiers, and inductors	25 946	80
Electric accumulators, incl. separators therefor	4 073	13
Electrical apparatus for switching or protecting electrical circuits, or for making connections to or in electrical circuits, for a voltage ≤ 1.000 v	612	2
Boards, panels, consoles, desks, cabinets and other bases for electric control or the distribution of electricity	531	2
Stoves, ranges, grates, cookers, incl. those with subsidiary boilers for central heating, barbecues, braziers, gas rings, plate warmers and similar non-electric domestic appliances, and parts thereof of iron or steel	513	2
Insulating fittings for electrical machines, appliances or equipment	467	1
Electrical resistors, incl. rheostats and potentiometers	229	1
Electrical capacitors, fixed, variable or adjustable “pre-set”	59	0
Electric sound or visual signalling apparatus	52	0
Electrical apparatus for switching or protecting electrical circuits, or for making connections to or in electrical circuits	40	0
Parts suitable for use solely or principally with the apparatus of heading 8535, 8536 or 8537, n.e.s.	13	0
Lamps and lighting fittings, incl. Searchlights and spotlights, and parts thereof, n.e.s	5	0
Electric instantaneous or storage water heaters and immersion heaters	3	0

Product group	Value, thous USD	Share, %
Electric generating sets and rotary converters	1	0
Electromechanical domestic appliances, with self-contained electric motor	1	0
Electromagnets (excl. magnets for medical use)	0	0
Total	32 546	100

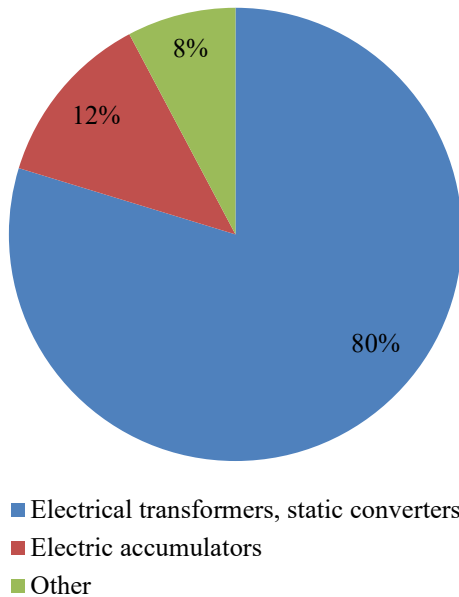


Fig. 4.5. Commodity structure of electrical equipment export in Khmelnytskyi region

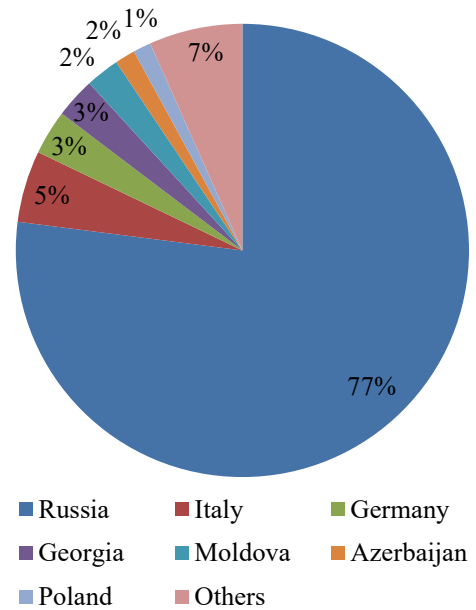


Fig. 4.6. Electrical equipment export by destinations in Khmelnytskyi region in 2018

The main electrical equipment manufacturing companies in Khmelnytskyi region are PJSC “Ukrelectro Apparatus”, Megatex Industrial LLC and “Cable Plant” LLC.

Table 4.10. Leading electrical equipment manufacturing companies in Khmelnytskyi region

ID code	Company name (English)	Company name (Ukrainian)
213440	PJSC “Ukrelectro Apparatus”	ПАТ “Укрелектроапарат”
37822918	Megatex Industrial LLC	ТОВ “Мегатекс Індастріал”
30686638	“Cable Plant” LLC	ТОВ “Кабельний Завод”
21332137	PE “PACT”	ПП “ПАКТ”
31617591	Transformatorr Service LLC	ТОВ “Трансформатор Сервіс”

Kirovohrad region

Other machinery and equipment industry industry in Kirovohrad region is represented by 105 enterprises, of which 72 are legal entities (69%), and 33 – individual entrepreneurs (31%). The sector is employing 5 148 full-time employees.

In 2018, sectors sales volume amounted to about UAH 3 474 million, of which UAH 3 434 million were generated by legal entities (99%), and the rest UAH 41 million – by individual entrepreneurs (1%).

Table 4.11. Characteristic of other machinery and equipment industry in Kirovohrad region in 2018

Indicator	Value
Number of companies, units	105
incl. legal entities	72
individual entrepreneurs	33
Sales, million UAH	3 474
incl. legal entities	3 434
individual entrepreneurs	41
Export, million USD	70
Share of exports in sales, %	55%
Employment, people	5 148

In 2018, the volume of other machinery and equipment industry products export in Kirovohrad region amounted to about USD 70.4 million.

Pumps for liquids, agricultural machinery for soil preparation or cultivation and engines and motors dominate in the commodity structure of exports (82% of total exports of the sector).

Main foreign sales markets are Russia (53%), China (11%) and Belarus (11%).

Table 4.12. Volume of other machinery and equipment export in Kirovohrad region in 2018

Product group	Value, thous USD	Share, %
Pumps for liquids, whether or not fitted with a measuring device	25 465	36
Agricultural, horticultural or forestry machinery for soil preparation or cultivation	17 722	25
Engines and motors (excl. steam turbines, internal combustion piston engine, hydraulic turbines, water wheels, gas turbines and electric motors)	15 273	22
Taps, cocks, valves and similar appliances for pipes, boiler shells, tanks, vats or the like	6 679	9
Trailers and semi-trailers	1 512	2
Parts suitable for use solely or principally with the machinery of heading 8425 to 8430, n.e.s.	1 081	2
Transmission shafts, incl. camshafts and crankshafts, and cranks	953	1
Machines and mechanical appliances having individual functions, not specified or included elsewhere in this chapter	378	1
Harvesting or threshing machinery, incl. straw or fodder balers	292	0
Mechanical appliances, whether or not hand-operated, for projecting, dispersing or spraying liquids or powders, n.e.s.	190	0
Machinery, not specified or included elsewhere in this chapter, for the industrial preparation or manufacture of food or drink	135	0
Lifting, handling, loading or unloading machinery	100	0
Others	570	1
Total	70 351	100

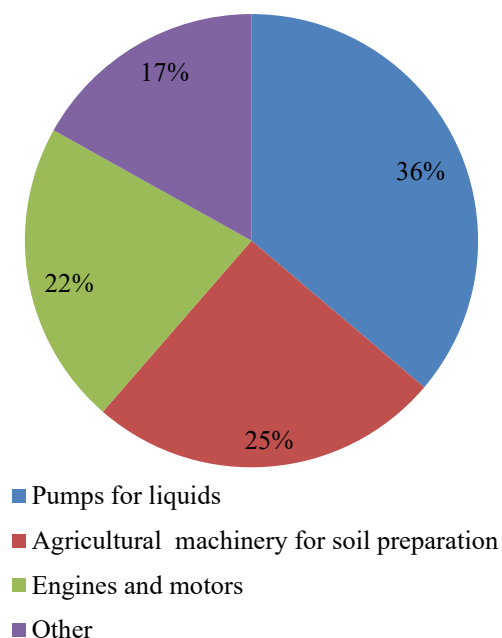


Fig. 4.7. Commodity structure of other machinery and equipment industry export in Kirovohrad region 2018

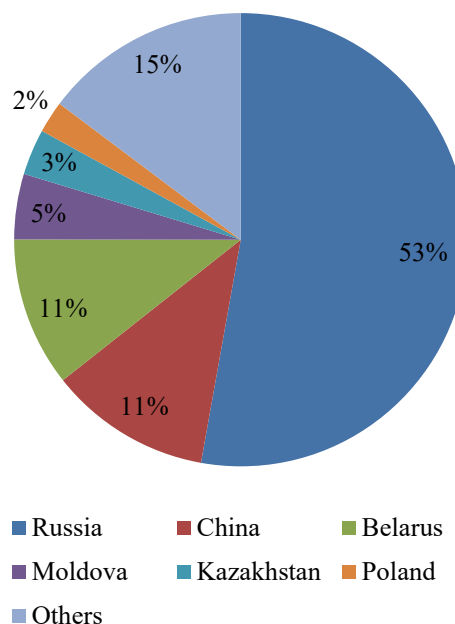


Fig. 4.8. Other machinery and equipment export by destinations in Kirovohrad region in 2018

The main other machinery and equipment industry companies in Kirovohrad region are PJSC “Elvorti”, PJSC “Hydrosyla” and PJSC “Hydrosyla APM”.

Table 4.13 Leading other machinery and equipment industry companies in Kirovohrad region

ID code	Company name (English)	Company name (Ukrainian)
5784437	PJSC “Elvorti”	ПАТ “Ельворті”
5786100	PJSC “Hydrosyla”	ПАТ “Гідросила”
36119987	PJSC “Hydrosyla APM”	ПрАТ “Гідросила АПМ”
32616007	PJSC “Hydrosyla Leda”	ПрАТ “Гідросила Леда”
34548222	Profi Stan LLC	ТОВ “Профі Стан”

Kyiv region

Paper and paper products industry in Kyiv region is represented by 87 enterprises, of which 50 are legal entities (57%), and 37 – individual entrepreneurs (43%). The sector employs 3 753 full-time employees.

In 2018, sectors sales volume amounted to about UAH 9 876 million, of which UAH 9 844 million were generated by legal entities (almost 100%), and the rest UAH 32 million – by individual entrepreneurs (less than 1%).

Table 4.14. Characteristic of paper and paper products industry in Kyiv region in 2018

Indicator	Value
Number of companies, units	87
incl. legal entities	50
individual entrepreneurs	37
Sales, million UAH	9 876
incl. legal entities	9 844
individual entrepreneurs	32
Export, million USD	91
Share of exports in sales, %	25%
Employment, people	3 753

In 2018, the volume of paper products export in Kyiv region amounted to about USD 91.4 million.

Paper, paperboard, cellulose wadding and webs of cellulose fibres, coated, impregnated, covered, surface-coloured dominate in the commodity structure of exports (27% of total exports of the sector).

Main foreign sales markets are Russia (41%), Belarus (12%) and Uzbekistan (7%).

Table 4.15. The volume of paper products export in Kyiv region in 2018

Product group	Value, thous USD	Share, %
Paper, paperboard, cellulose wadding and webs of cellulose fibres, coated, impregnated, covered, surface-coloured, surface-decorated or printed, in rolls or in square or rectangular sheets, of any size	24 846	27
Paper and paperboard, coated on one or both sides with kaolin "china clay" or other inorganic substances, with or without a binder, and with no other coating, whether or not surface-coloured, surface-decorated or printed, in rolls or in square or rectangular sheets, of any size	18 861	21
Toilet paper and similar paper, cellulose wadding or webs of cellulose fibres, of a kind used for household or sanitary purposes, in rolls of a width ≤ 36 cm, or cut to size or shape	17 970	20
Cartons, boxes, cases, bags and other packing containers, of paper, paperboard, cellulose wadding or webs of cellulose fibres, n.e.s.	17 475	19
Toilet or facial tissue stock, towel or napkin stock and similar paper for household or sanitary purposes	4 865	5
Other paper and paperboard, uncoated, in rolls of a width > 36 cm or in square or rectangular sheets with one side > 36 cm and the other side > 15 cm in the unfolded state,	2 985	3
Corrugated paper and paperboard "with or without glued flat surface sheets", creped, crinkled, embossed or perforated, in rolls of a width > 36 cm or in square or rectangular sheets with one side > 36 cm and the other side > 15 cm in the unfolded state	2 803	3
Paper, paperboard, cellulose wadding and webs of cellulose fibres, in strips or rolls of a width ≤ 36 cm, in rectangular or square sheets of which no side > 36 cm in the unfolded state, or cut to shape other than rectangular or square, and articles of paper pulp, paper, paperboard, cellulose wadding or webs or cellulose fibres, n.e.s.	770	1
Paper or paperboard labels of all kinds, whether or not printed	379	0
Registers, account books, notebooks, order books, receipt books, letter pads, memorandum pads, diaries and similar articles, exercise books, blotting pads, binders, folders, file covers, manifold business forms, interleaved carbon sets and other articles of stationery, of paper or paperboard	250	0
Other	146	0
Total	91 351	100

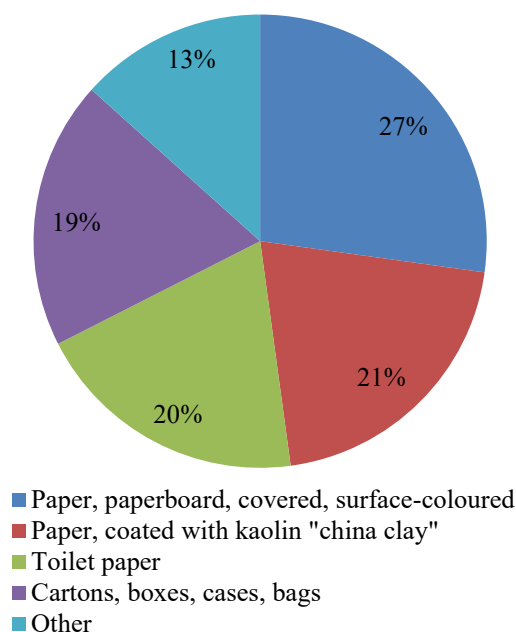


Fig. 4.9. Commodity structure of paper products export in Kyiv region in 2018

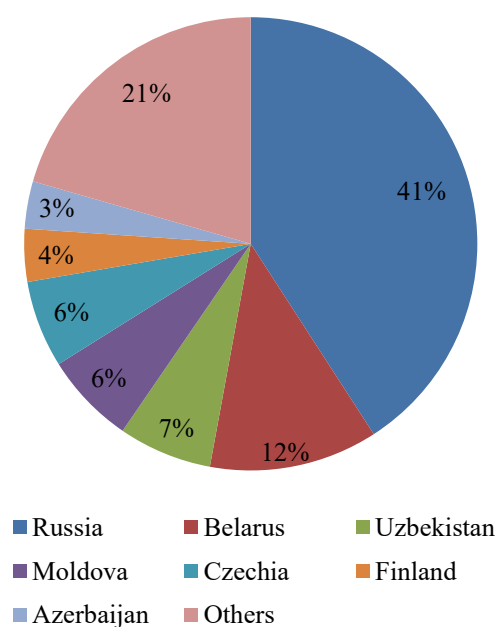


Fig. 4.10. Paper products export by destinations in Kyiv region in 2018

The main paper and paper products companies in Kyiv region are PJSC “Kyiv cardboard and paper mill”, Elopak-Fastiv PJSC and Trypillya Packing Mill LLC.

Table 4.16. Leading paper and paper products companies in Kyiv region

ID code	Company name (English)	Company name (Ukrainian)
5509659	PJSC “Kyiv cardboard and paper mill”	ПрАТ “Київський картонно-паперовий комбінат”
418082	Elopak-Fastiv PJSC	ПрАТ “Елопак-Фастів”
31826484	Trypillya Packing Mill LLC	ТОВ “Трипільський пакувальний комбінат”
30965880	Bella-Center LLC	ТОВ “Белла-Центр”
41976219	Palp Mill Pack LLC	ТОВ “Палп Мілл Пак”

Vinnytsia region

Wood-processing industry in Vinnytsia region is represented by 771 enterprises, of which 103 are legal entities (13%), and 668 - individual entrepreneurs (87%). The sector employs 235 full-time employees.

In 2018, sectors sales volume amounted to about UAH 3 349 million, of which UAH 2 860 million were generated by legal entities (85%), and the rest UAH 489 million – by individual entrepreneurs (15%).

Table 4.17. Characteristic of wood processing industry in Vinnytsia region in 2018

Indicator	Value
Number of companies, units	771
incl. legal entities	103
individual entrepreneurs	668
Sales, million UAH	3 349
incl. legal entities	2 860
individual entrepreneurs	489
Export, million USD	97
Share of exports in sales, %	79%
Employment, people	3 235

In 2018, the volume of wood-processing industry products export in Vinnytsia region amounted to about USD 96.7 million.

Wooden builders' joinery and carpentry dominate in the commodity structure of exports (34% of total exports of the sector).

Main foreign sales markets are Poland (63%), Russia (9%) and Romania (5%).

Table 4.18. The volume of wood products export in Vinnytsia region in 2018

Product group	Value, thous USD	Share, %
Builders' joinery and carpentry, of wood, incl. cellular wood panels, assembled flooring panels, shingles and shakes, of wood	66 602	69
Wood sawn or chipped lengthwise, sliced or peeled, whether or not planed, sanded or end-jointed, of a thickness of > 6 mm	20 269	21
Sheets for veneering	8 568	9
Packing cases, boxes, crates, drums and similar packings, of wood	759	1
Wood, incl. strips and friezes for parquet flooring, not assembled, continuously shaped "tongued, grooved, rebated, chamfered, v-jointed beaded, moulded, rounded or the like" along any of its edges, ends or faces, whether or not planed, sanded or end-jointe	227	0
Other articles of wood, n.e.s.	133	0
Hoopwood	130	0
Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood	33	0
Tableware and kitchenware, of wood	3	0
Plywood, veneered panel and similar laminated wood	0	0
Wood marquetry and inlaid wood	0	0
Total	96 725	100

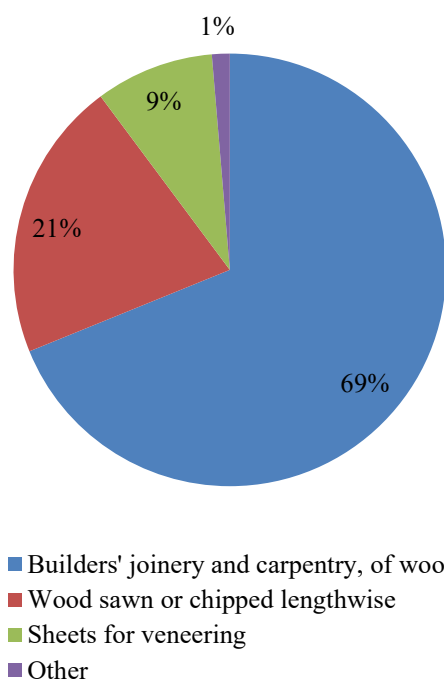


Fig. 4.11. Commodity structure of wood products export in Vinnytsia region 2018

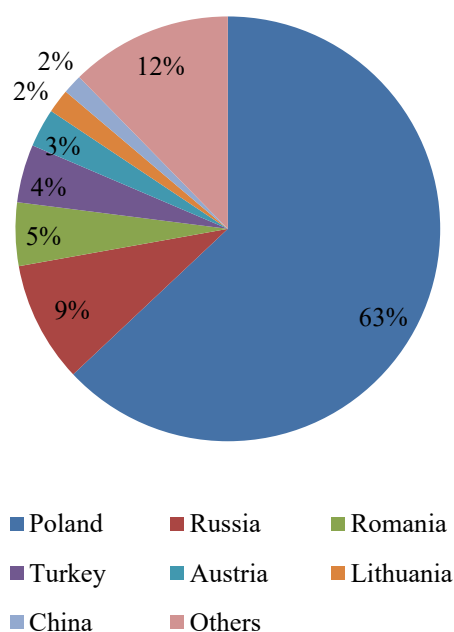


Fig. 4.12. Wood products products export by destinations in Vinnytsia region in 2018

The main wood-processing industry companies in Vinnytsia region are Barlinek Invest LLC, Terminus LLC and Riton LLC.

Table 4.19. Leading wood-processing industry companies in Vinnytsia region

ID code	Company name (English)	Company name (Ukrainian)
34004579	Barlinek Invest LLC	ТОВ "Барлінек Інвест"
33623434	Terminus LLC	ТОВ "Термінус"
31836403	Riton LLC	ТОВ "Рітон"
35903698	Prostor-VS LLC	ТОВ "Простор-ВС"
37258725	Fabryka Dom LLC	ТОВ "Фабрика Дом"

Zhytomyr region

Wood-processing industry in Zhytomyr region is represented by 1 399 enterprises, of which 254 are legal entities (18%), and 1 145 – individual entrepreneurs (82%). The sector employs 6 277 full-time employees.

In 2018, sectors sales volume amounted to about UAH 6 412 million, of which UAH 5 327 million were generated by legal entities (83%), and the rest UAH 1 085 million – by individual entrepreneurs (17%).

Table 4.20. Characteristic of wood processing industry in Zhytomyr region in 2018

Indicator	Value
Number of companies, units	1 399
incl. legal entities	254
individual entrepreneurs	1 145
Sales, million UAH	6 412
incl. legal entities	5 327
individual entrepreneurs	1 085
Export, million USD	103
Share of exports in sales, %	44%
Employment, people	6 277

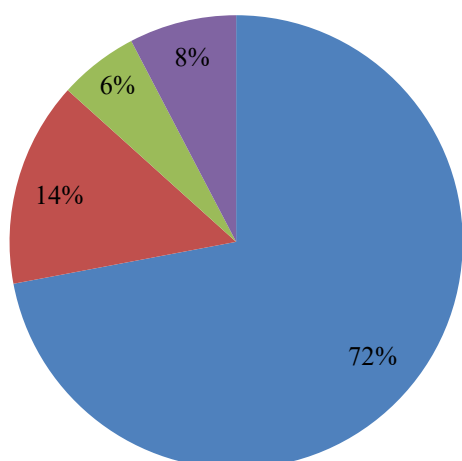
In 2018, the volume of wood-processing industry products export in Zhytomyr region amounted to about USD 103.1 million.

Wood sawn or chipped lengthwise dominate in the commodity structure of exports (72% of total exports of the sector).

Main foreign sales markets are Turkey (16%), China (12%) and Germany (9%).

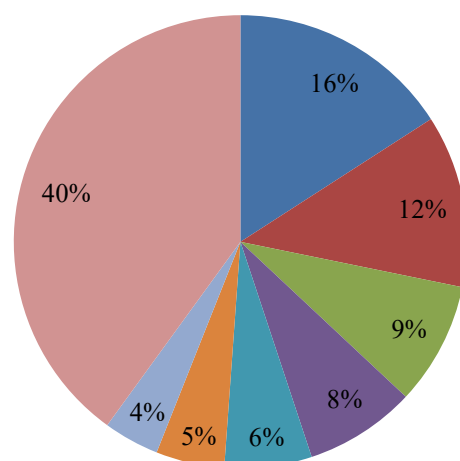
Table 4.21. Volume of wood products export in Zhytomyr region in 2018

Product group	Value, thous USD	Share, %
Wood sawn or chipped lengthwise, sliced or peeled, whether or not planed, sanded or end-jointed, of a thickness of > 6 mm	74 247	72
Sheets for veneering	15 078	15
Builders' joinery and carpentry, of wood	5 849	6
Other articles of wood, n.e.s.	3 863	4
Packing cases, boxes, crates, drums and similar packings, of wood	2 119	2
Wood, incl. strips and friezes for parquet flooring, not assembled, sanded or end-jointed	1 221	1
Hoopwood	252	0
Plywood, veneered panel and similar laminated wood	175	0
Casks, barrels, vats, tubs and other coopers' products parts thereof	97	0
Particle board, oriented strand board "osb" and similar board	74	0
Railway or tramway sleepers "cross-ties" of wood	62	0
Wood marquetry and inlaid wood	24	0
Other	6	0
Total	103 068	100



■ Wood sawn or chipped lengthwise
 ■ Sheets for veneering
 ■ Builders' joinery and carpentry, of wood
 ■ Other

Fig. 4.13. Commodity structure of wood products export in Zhytomyr region in 2018



■ Turkey
 ■ China
 ■ Germany
 ■ Poland
 ■ Netherlands
 ■ Austria
 ■ Israel
 ■ Others

Fig. 4.14. Wood products products export by destinations in Zhytomyr region in 2018

The main wood-processing industry companies in Zhytomyr region are JSC “Korosten MDF Plant”, “Ukrainian Holding Sawmill Company” LLC and Subsidiary company “Rhythm” of Rost LLC.

Table 4.22. Leading wood-processing industry companies in Zhytomyr region

ID code	Company name (English)	Company name (Ukrainian)
37079170	JSC “Korosten MDF Plant”	ПрАТ “Коростенський завод МДФ”
39325379	“Ukrainian Holding Sawmill Company” LLC	ТОВ “Українська холдінгова лісопильна компанія”
32085195	Subsidiary company “Rhythm” of Rost LLC	Дочірнє підприємство “Ритм” ТОВ “Рост”
36311007	Vivad 09 LLC	ТОВ “Вівад 09”
35530368	BF Project LLC	ТОВ “БФ Проект”

Annexes

Annex 1. List of foreign companies

Annex 2. List of Cooperatives

Annex 3. List of NGOs

Annex 4. List of Companies in the sectors under study

Annex 5. Report on interviews with enterprises

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