



INVESTMENT & TRADE  
FACILITATION CENTER



Kingdom of the Netherlands



# Multisectoral Market Study

## Western Ukraine



Kyiv 2018

# Multisectoral Market Study Western Ukraine

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## EXECUTIVE SUMMARY

**The purpose of the study** is a deep research of economic attractiveness and investment potential of 7 Western regions of Ukraine in order to inform Dutch and other foreign companies about sector-specific business opportunities in Western Ukraine, to identify areas for further cooperation between Ukrainian and Dutch companies and therewith to contribute to the private sector development of the regions.

- **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 (light industry, furniture production, chemical industry, production of plastic and rubber items, production of construction materials, metal works, machine building)

- bioenergy (current and planned projects in bioenergy),

- production of machinery, equipment, materials for abovementioned 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).

- This study includes the interviews with the governmental representatives of the selected regions, businesses and NGO's operating in the selected sectors. They may reflect the subjective opinions on economic, political situation in Ukraine as of 2018 and might contradict with other expert opinions.
- Sectors under analysis in Western Ukrainian regions includes 15 030 companies employing 191,829 full-time employees. Sectors' sales volume in 2016 amounted to UAH 73.8 billion, which was mainly generated by Lviv region (UAH 21.9 billion), Rivne region (UAH 13.0 billion) and Zakarpattia region (UAH 9.9 billion).
- In terms of sales value, the largest sectors are machine building (UAH 19.5 billion or 26%), construction materials (UAH 13.4 billion or 18%), manufacture of chemicals and chemical products (UAH 7.9 billion or 11%) and textile, clothing and footwear industry (UAH 7.0 billion or 9%). Together, these sectors accounted for almost 65% of sales.
- The sectors under study face some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (43%), lack of government support (38%), inaccessibility of funding (37%), and outdated technology and equipment (24%).

- There is a significant interest for cooperation with Dutch business - 61% of the surveyed companies show interest in cooperation with Dutch companies, first of all in terms of entering foreign markets (71%), obtaining new technologies (67%), and receiving financing (59%).
- Fruits and berries production sector includes 618 companies employing 2,713 full-time employees (excluding seasonal workers). Sector's sales volume in 2016 amounted to UAH 525 million, which was mainly generated by Chernivtsi region (UAH 178 million), Zakarpattia region (UAH 105 million) and Lviv region (UAH 81 million).
- Vegetables production sector includes 463 companies employing 1,869 full-time employees (excluding seasonal workers). Sector's sales volume in 2016 amounted to UAH 1.37 billion, which was mainly generated by Lviv region (UAH 747 million), Ternopil region (UAH 242 million) and Rivne region (UAH 188 million).
- Milk production and processing sector includes 400 companies (including 129 in the production of milk and 271 in milk processing), employing 15 thousand full-time employees. Sector's sales volume in 2016 amounted to UAH 6.9 billion, which was mainly generated by Rivne region (UAH 2.34 billion), Ternopil region (UAH 2.17 billion) and Lviv region (UAH 1.41 billion).
- Fruit and vegetable processing sector includes 135 companies employing 2,377 full-time employees. Sector's sales volume in 2016 amounted to UAH 1.63 billion, which was mainly generated by Lviv region (UAH 453 million), Ternopil region (UAH 361 million) and Chernivtsi region (UAH 247 million).
- Chemical sector includes 331 companies employing 10,200 full-time employees. Sector's sales volume in 2016 amounted to UAH 7.9 billion, which was mainly generated by Rivne region (UAH 3.4 billion), Ivano-Frankivsk region (UAH 1.25 billion) and Lviv region (UAH 1.23 billion).
- Polymers and plastics production sector includes 857 companies employing 8,500 full-time employees. Sector's sales volume in 2016 amounted to UAH 6.3 billion, which was mainly generated by Lviv region (UAH 2.69 billion), Volyn region (UAH 1 billion) and Ternopil region (UAH 0.94 billion).
- Textile, clothing and footwear sector includes 3,497 companies employing 38,061 full-time employees. Sector's sales volume in 2016 amounted to UAH 7.01 billion, which was mainly generated by Lviv region (UAH 3.0 billion), Zakarpattia region (UAH 1.3 billion) and Rivne region (UAH 0.74 billion).
- Construction materials sector includes 3,140 companies employing 22,800 full-time employees. Sector's sales volume in 2016 amounted to UAH 13.4 billion, which was mainly

generated by Ivano-Frankivsk region (UAH 3.85 billion), Lviv region (UAH 3.77 billion) and Rivne region (UAH 3.59 billion).

- Metal working sector includes 2,171 companies employing 10,400 full-time employees. Sector's sales volume in 2016 amounted to UAH 3.59 billion, which was mainly generated by Lviv region (UAH 1.87 billion) and Rivne region (UAH 0.52 billion).
- Machine building sector includes 678 companies employing 62,869 full-time employees. Sector's sales volume in 2016 amounted to UAH 19.5 billion, which was mainly generated by Zakarpattia region (UAH 5.89 billion), Lviv region (UAH 4.88 billion) and Volyn region (UAH 4.11 billion).
- Furniture sector includes 2,409 companies, employing 17,000 full-time employees. Sector's sales volume in 2016 amounted to UAH 5.6 billion, which was mainly generated by Lviv region (UAH 1.75 billion), Volyn region (UAH 1.72 billion) and Rivne region (UAH 0.9 billion).
- In Western Ukraine, only one third of the existing potential in bioenergy is used. There is a significant market space for new players. The existing raw material potential is not sufficiently used by present market participants. The presence of a large area of degraded land unsuitable for agriculture in the regions under study creates the preconditions for faster development of the biofuel segment of energy plants.
- In Western Ukrainian regions there are 62 producers of equipment and components for agro-sectors and bioenergy production, mainly boiler producers (26 companies), agricultural machinery producers (16 companies) and fertilizers producers (9 companies).
- Perspective areas of cooperation by sectors are:
  - milk production and processing sector: development of dairy farms equipped in accordance with European standards for small producers;
  - 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, which is used only at one-third; 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 Western Ukrainian regions, there are 15 030 enterprises representing sectors under analysis, 3 973 of which are legal entities (26%), and 11 057 - individual entrepreneurs (74%).

The largest number of companies operates in Lviv region (4 481 units or 30%), and the least - in Volyn region (1 420 units or 9%).

The sectors are employing 191 829 full-time employees, including 170 658 in legal entities (89%), and 21 171 are employed by individual entrepreneurs (about 11%). The sectors' leader by the number of employees is Lviv region (62 878 people or 33% of total employment), while the smallest employment in the sector is in Chernivtsi region (12 205 people or 6%).

**Table 1.1. Number of functioning enterprises and employment in sectors under study in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
<b>All sectors under study</b>						
Chernivtsi region	445	1 633	2 078	9 767	2 438	12 205
Ivano-Frankivsk region	571	1 498	2 069	17 481	2 967	20 448
Lviv region	1 263	3 218	4 481	56 111	6 767	62 878
Rivne region	428	1 220	1 648	20 063	2 574	22 637
Ternopil region	388	1 157	1 545	15 923	2 513	18 436
Zakarpattia region	407	1 382	1 789	30 117	1 985	32 102
Volyn region	471	949	1 420	21 196	1 927	23 123
<b>Total West Ukraine regions</b>	<b>3 973</b>	<b>11 057</b>	<b>15 030</b>	<b>170 658</b>	<b>21 171</b>	<b>191 829</b>
<b>Agro-food sectors</b>						
Chernivtsi region	233	129	362	2 057	212	2 269
Ivano-Frankivsk region	154	55	209	1 559	158	1 717
Lviv region	214	150	364	4 169	187	4 356
Rivne region	132	61	193	5 456	199	5 655
Ternopil region	118	89	207	3 723	131	3 854
Zakarpattia region	142	192	334	973	243	1 216
Volyn region	215	63	278	2 862	83	2 945
<b>Total West Ukraine regions</b>	<b>1 208</b>	<b>739</b>	<b>1 947</b>	<b>20 799</b>	<b>1 213</b>	<b>22 012</b>
<b>Industry sectors</b>						
Chernivtsi region	212	1 504	1 716	7 710	2 226	9 936
Ivano-Frankivsk region	417	1 443	1 860	15 922	2 809	18 731
Lviv region	1 049	3 068	4 117	51 942	6 580	58 522
Rivne region	296	1 159	1 455	14 607	2 375	16 982
Ternopil region	270	1 068	1 338	12 200	2 382	14 582
Zakarpattia region	265	1 190	1 455	29 144	1 742	30 886
Volyn region	256	886	1 142	18 334	1 844	20 178
<b>Total West Ukraine regions</b>	<b>2 765</b>	<b>10 318</b>	<b>13 083</b>	<b>149 859</b>	<b>19 958</b>	<b>169 817</b>



The largest number of companies is functioning in the textile, clothing and footwear industry (3 497 units or 23%), production of construction materials (3 140 units or 21%) and furniture production (2 171 units or 14%).

Machine building, production of construction materials and textile, clothing and footwear industry dominate in employment structure – these sectors account for about 65% of all employees in the surveyed sectors.

**Table 1.2. Number of functioning enterprises and employment in sectors under study in 2016**

Sector	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Furniture production	285	2 124	2 409	12 577	4 455	17 032
Machine building	414	264	678	62 374	495	62 869
Manufacture of chemicals and chemical products	174	157	331	9 904	271	10 175
Manufacture of rubber and plastic products	331	526	857	7 331	1 164	8 495
Metalworking	428	1 743	2 171	8 079	2 315	10 394
Processing and preserving of fruit and vegetables	88	47	135	2 290	87	2 377
Production of milk	562	40	602	6 160	46	6 206
Manufacture of dairy products	68	61	129	8 536	311	8 847
Production of fruits and berries	318	300	618	2 373	340	2 713
Production of vegetables and mushrooms	172	291	463	1 440	429	1 869
Production of construction materials	563	2 577	3 140	17 951	4 840	22 791
Textile, clothing and footwear industry	570	2 927	3 497	31 643	6 418	38 061
<b>TOTAL</b>	<b>3 973</b>	<b>11 057</b>	<b>15 030</b>	<b>170 658</b>	<b>21 171</b>	<b>191 829</b>

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

In 2016, sales volume of enterprises in the sectors under study amounted to about UAH 73 774 million, of which UAH 70 355 million were generated by legal entities (95%), and the rest UAH 3 420 million – by individual entrepreneurs (about 5%).

In the regional structure, the leaders are Lviv region (UAH 21 868 million or 30% of sales), Rivne region (UAH 13 030 million or 18%) and Zakarpattia region (UAH 9 886 million or 13%). Together, these regions account for almost 61% of sales among Western Ukrainian regions.

**Table 1.3. The volume of sales in sectors under study in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	2 944	402	3 345
Ivano-Frankivsk region	8 632	461	9 093
Lviv region	20 754	1 114	21 868
Rivne region	12 611	419	13 030
Ternopil region	7 108	338	7 446
Zakarpattia region	9 560	326	9 886
Volyn region	8 747	359	9 106
<b>Total West Ukraine regions</b>	<b>70 355</b>	<b>3 420</b>	<b>73 774</b>

In terms of sales value, the largest sectors are production of machine building (UAH 19 546 million or 26%), construction materials (UAH 13 366 million or 18%), manufacture of chemicals and chemical products (UAH 7 916 million or 11%) and textile, clothing and footwear industry (UAH 7 011 million or 9%). Together, these sectors accounted for almost 65% of sales in 2016.

**Table 1.4. The volume of sales in sectors under study in 2016, mln. UAH**

Sector	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Furniture production	4 949	644	5 594
Machine building	19 336	210	19 546
Manufacture of chemicals and chemical products	7 835	81	7 916
Manufacture of rubber and plastic products	5 965	322	6 287
Metalworking	3 154	440	3 594
Processing and preserving of fruit and vegetables	1 609	17	1 626
Production of milk	1 889	4	1 893
Manufacture of dairy products	4 982	64	5 046
Production of fruits and berries	459	66	525
Production of vegetables and mushrooms	1 324	48	1 372
Production of construction materials	12 719	646	13 366
Textile, clothing and footwear industry	6 134	876	7 011
<b>TOTAL</b>	<b>70 355</b>	<b>3 420</b>	<b>73 774</b>

Among Western Ukrainian regions, Lviv region is leading in 7 out of 11 sectors under study. It is the largest in terms of sales of furniture, textile, clothing and footwear products, manufacture of rubber and plastic products, metalworking products, growing of vegetables and processing of fruits and vegetables.

Chernivtsi region is the leader in sales of fruit and berries.

Ivano-Frankivsk region is the largest in construction materials sales.

Rivne region is the largest in chemical products, milk and dairy products sales.

Zakarpattia region is the largest in machine-building products.

**Table 1.5. Regional sales in sectors under study in 2016, mln. UAH**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Furniture production	316	189	1 753	898	121	594	1 724	5 594
Machine building	533	1 945	4 884	785	1 394	5 889	4 116	19 546
Manufacture of chemicals and chemical products	104	1 249	1 226	3 370	685	1 120	164	7 916
Manufacture of rubber and plastic products	475	535	2 693	461	937	174	1 012	6 287
Metalworking	310	256	1 868	515	239	104	302	3 594
Processing and preserving of fruit and vegetables	246	60	453	138	360	220	147	1 626
Production of milk	108	241	195	475	420	10	444	1 893
Manufacture of dairy products	19	172	1 210	1 864	1 746	5	30	5 046
Production of fruits and berries	178	31	81	14	65	105	51	525
Production of vegetables and mushrooms	15	56	747	188	242	46	78	1 372
Production of construction materials	398	3 845	3 771	3 585	847	305	614	13 366
Textile, clothing and footwear industry	644	514	2 986	738	390	1 314	424	7 011
<b>TOTAL</b>	<b>3 345</b>	<b>9 093</b>	<b>21 868</b>	<b>13 030</b>	<b>7 446</b>	<b>9 886</b>	<b>9 106</b>	<b>73 774</b>

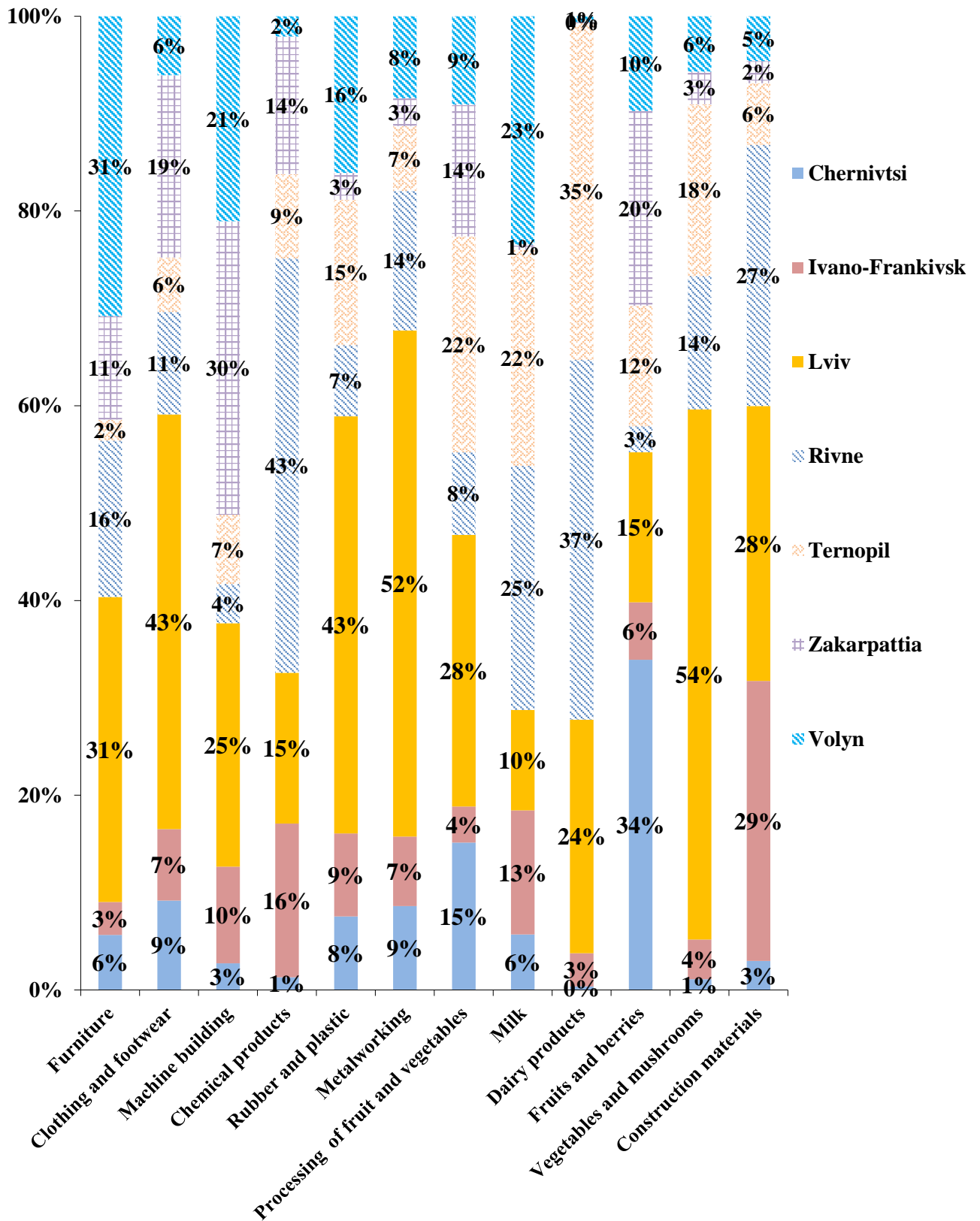


Fig. 1.1. Regional sales in sectors under study in 2016, %

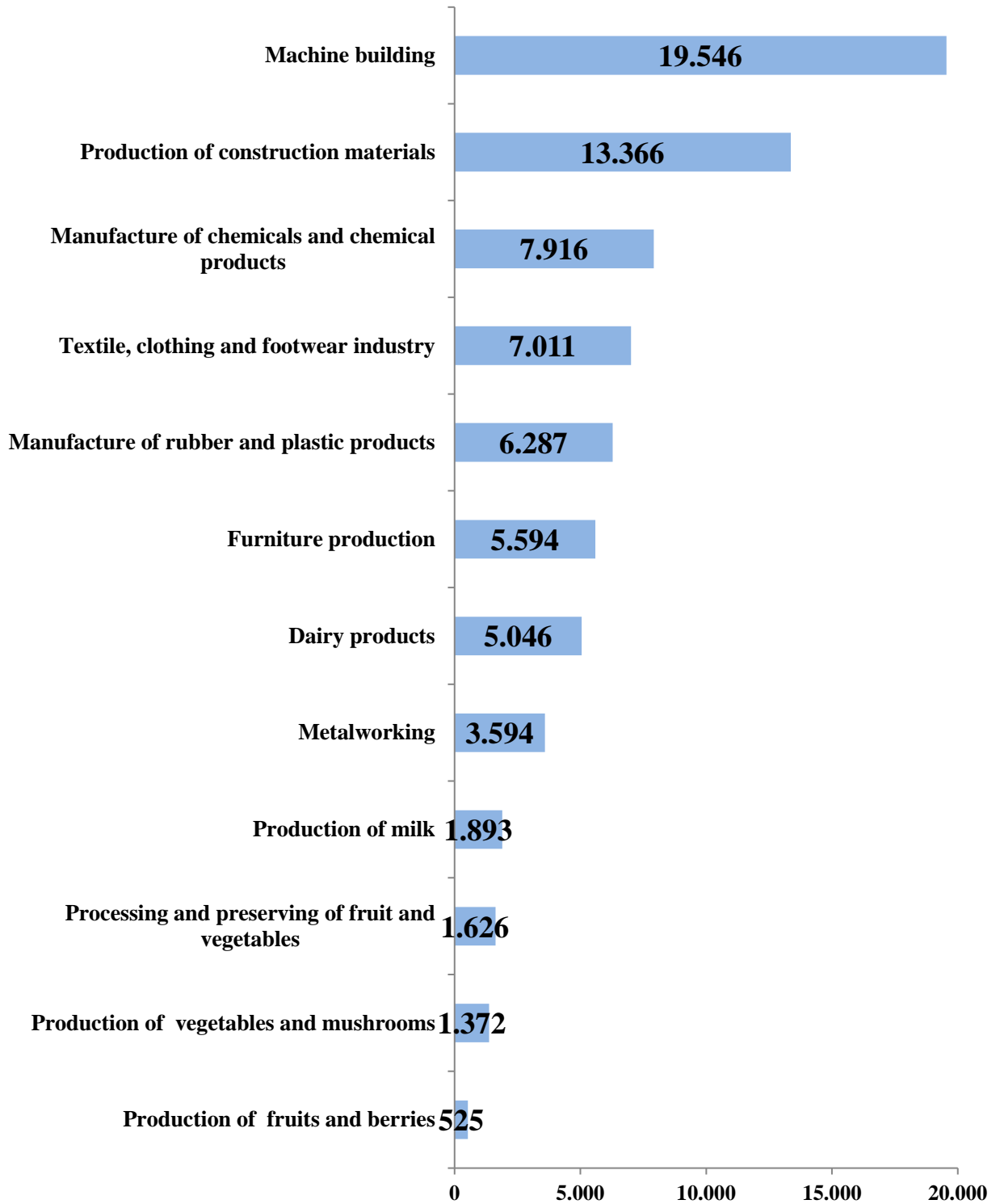


Fig. 1.2. Sectoral sales in sectors under study in 2016, mln. UAH

The targets companies in the Western Ukrainian regions under investigation are PJSC "Rivneazot", PJSC "Ivano-Frankivsk Cement" and PJSC "SKF Ukraine.

**Table 1.6. Leading companies in sectors under investigation**

<b>ID code</b>	<b>Company name (English)</b>	<b>Company name (Ukrainian)</b>	<b>Sector</b>
5607824	PJSC "Rivneazot"	ПАТ "Рівнеазот"	Manufacture of chemicals and chemical products
292988	PJSC "Ivano-Frankivsk Cement"	ПАТ "Івано-Франківськцемент"	Production of construction materials
5745160	PJSC "SKF Ukraine"	ПАТ "СКФ Україна"	Machine building
37786903	"KRT Corporation" LLC	ТОВ "Корпорація КРТ"	Production of construction materials
30913130	PJSC «Eurocar»	ПрАТ "Єврокар"	Machine building
32269989	"Yazaki Ukraine" LLC	ТОВ "Ядзакі Україна"	Machine building
21751578	Joint Ukrainian-Polish Company "Modern-Expo" LLC	Спільне Українсько-Польське Підприємство ТОВ "Модерн-Експо"	Furniture production
5496081	PJSC "Dubnomoloko"	ПАТ "Дубномолоко"	Production and processing of milk
30356917	PrJSC "Ternopil milk factory Molokiya"	ПрАТ «Тернопільський молокозавод»	Production and processing of milk
31358171	"LEONI Wiring Systems UA GmbH" LLC	ТОВ "Леоні Ваєрінг Системс УА ГМБХ"	Machine building

Regional distribution of the largest companies in the sector are shown in the Table 1.7.

Table 1.7. Top-10 companies in sectors under investigation by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues
Chernivtsi region	30501814	Production and Commercial Firm "Balakkom" LLC	ТОВ Виробничо-Комерційна Фірма "Балакком"	Light industry	more than 100 mln. UAH
	30045061	"Mashzavod" LLC	ТОВ "Машзавод"	Machine building	more than 100 mln. UAH
	38178714	PE "Fabryka Vikon Lux"	ПП "Фабрика Вікон Люкс"	Manufacture of rubber and plastic products	more than 100 mln. UAH
	33688879	"Doler Bukovyna" LLC	ТОВ "Дюлер Буковина"	Processing of fruit and vegetables	more than 100 mln. UAH
	14314676	"Kvarz" Factory ALC	ТДВ "Завод "Кварц"	Machine building	more than 100 mln. UAH
	310166	"Trembita" ALC	ТОВ "Трембіта"	Light industry	50-100 mln. UAH
	39100130	"Rodnichok-1" LLC	ТОВ "Родничок-1"	Metalworking	50-100 mln. UAH
	35453632	"Agrofirma Suvorova" LLC	ТОВ "Агрофірма Імені Суворова"	Production and processing of milk	50-100 mln. UAH
	32726478	"Furniture Tokabo" LLC	ТОВ "Меблі "Токабо"	Furniture production	50-100 mln. UAH
	36748170	"SO'OK" LLC	ТОВ "СО'ОК"	Processing of fruit and vegetables	50-100 mln. UAH
Ivano-Frankivsk region	292988	PJSC "Ivano-Frankivsk Cement"	ПАТ "Івано-Франківськцемент"	Production of construction materials	more than 100 mln. UAH
	37183000	Electrolux Ukraine LLC	ТОВ "Електролюкс Україна"	Machine building	more than 100 mln. UAH
	19389809	State Enterprise "Production Association Karpaty "	ДП "Виробниче Об'єднання "Карпати"	Machine building	more than 100 mln. UAH
	30408081	"Padana Kemikal Kompanuds" LLC	ТОВ "Падана Кемікал Компанудс"	Manufacture of chemical products	more than 100 mln. UAH
	24681750	"Polikom" LLC	ТОВ "Поліком."	Manufacture of rubber and plastic products	more than 100 mln. UAH
	34078038	Tyco Electronics Ukraine Limited	ТОВ "Тайко Електронікс Юкрейн Лімітед"	Machine building	more than 100 mln. UAH
	33578130	"Karpatsmoly" LLC	ТОВ "Карпатсмоли"	Manufacture of chemical products	more than 100 mln. UAH
	32257423	PrJSC "Fine organic synthesis plant Barva "	ПрАТ "Завод тонкого органічного синтезу "Барва"	Manufacture of chemicals and chemical products	more than 100 mln. UAH
	35173399	"Agrarian Perspective" LLC	ТОВ "Аграрна Перспектива"	Production and processing of milk	more than 100 mln. UAH
	33578214	"Polikem" LLC	ТОВ "Полікем"	Manufacture of chemical products	more than 100 mln. UAH
Ternopil region	30356917	PrJSC "Ternopil milk factory Molokiya"	ПрАТ «Тернопільський молокозавод»	Production and processing of milk	more than 100 mln. UAH
	34419383	"SE Bordnetze-Ukraine" LLC	ТОВ "СЕ Борднетце -Україна"	Machine building	more than 100 mln. UAH
	952829	"Buschachagrochlibprom" LLC	ТОВ "Бучачагрохлібпром"	Production and processing of milk	more than 100 mln. UAH
	33589252	"Spetsavtoinvest" LLC	ТОВ "Спецавтоінвест"	Production of construction materials	more than 100 mln. UAH
	33992917	"Terviknoplast" LLC	ТОВ "Тервікнопласт"	Manufacture of rubber and plastic products	more than 100 mln. UAH
	37961273	"Ferozit" LLC	ТОВ "Ферозіт"	Production of construction materials	more than 100 mln. UAH
	35368754	Dinter Ukraine Skala, SE "Dinter Ukraine" LLC	ДП "Дінтер Україна Скала" ТОВ "Дінтер Україна"	Processing of fruit and vegetables	more than 100 mln. UAH
	30917423	"Kremenets Moloko" LLC	ТОВ "Кременецьке Молоко"	Production and processing of milk	more than 100 mln. UAH
	31878417	"Interfom-Zakhid" LLC	ТОВ "Інтерфом-Захід"	Manufacture of rubber and plastic products	more than 100 mln. UAH
	35855828	PAE Agrofirma "Goryn"	ПСП Агрофірма "Горинь"	Production and processing of milk	more than 100 mln. UAH

## ITFC - Ukrainian Industry Expertise

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues
Lviv region	37786903	LLC "KRT Corporation"	ТОВ "Корпорація КРТ"	Production of construction materials	more than 100 mln. UAH
	31358171	" LEONI Wiring Systems UA GmbH" LLC	ТОВ "Леоні Ваєрінг Системс УА ГМБХ"	Machine building	more than 100 mln. UAH
	293025	PJSC "Mykolayivtsement"	ПАТ "Миколаївцемент"	Production of construction materials	more than 100 mln. UAH
	1553706	PJSC "Lviv Cold Combine"	ПАТ "Львівський Холодокомбінат"	Production and processing of milk	more than 100 mln. UAH
	33909724	LLC "Bader Ukraine"	ТОВ "Бадер Україна"	Light industry	more than 100 mln. UAH
	214244	PJSC Iskra	ПАТ "Іскра"	Machine building	more than 100 mln. UAH
	25550470	LLC "Furniture-Service"	ТОВ "Мебель-Сервіс"	Furniture production	more than 100 mln. UAH
	32475074	LLC "Yablunevyy Dar"	ТОВ " Яблуневий Дар"	Processing of vegetables, fruit, berries, mushrooms;	more than 100 mln. UAH
	30648854	LLC "Sniezka-Ukraine"	ТОВ "Сніжка-Україна"	Manufacture of chemicals and chemical products	more than 100 mln. UAH
	39685014	LLC "Dairy Company" Galichyna "	ТОВ "Молочна Компанія "Галичина"	Production and processing of milk	more than 100 mln. UAH
Rivne region	5607824	PJSC "Rivneazot"	ПАТ "Рівнеазот"	Manufacture of chemicals and chemical products	more than 100 mln. UAH
	5496081	PJSC "Dubnomoloko"	ПАТ "Дубномолоко"	Production and processing of milk	more than 100 mln. UAH
	22555135	PJSC "Konsumers-Skolo-Zorya"	ПрАТ "Консьюмерс-Скло-Зоря"	Production of construction materials	more than 100 mln. UAH
	33426845	"Morgan Furniture " LLC	ТОВ "Морган Феніче"	Furniture production	more than 100 mln. UAH
	30923971	PJSC "Kostopilskiy Factory Of Glassware"	ПрАТ "Костопільський Завод Скловиробів"	Production of construction materials	more than 100 mln. UAH
	31259168	LLC "Radyvylivmoloko"	ТОВ "Радивилівмолоко"	Production and processing of milk	more than 100 mln. UAH
	293462	PJSC "Rokytno Glassworks "	ПрАТ "Рокитнівський Скляний Завод"	Production of construction materials	more than 100 mln. UAH
	13970259	LLC "Production Company" Akvaton "	ТОВ "Виробниче Підприємство "Акватон"	Machine building	more than 100 mln. UAH
	34704105	LLC " High-Voltage Union--RZWA"	ТОВ "Високовольтний Союз-РЗВА"	Machine building	more than 100 mln. UAH
	3775871	Volovikova Agricultural Enterprise LLC	ТОВ СГП "Імені Воловікова"	Production and processing of milk	more than 100 mln. UAH
Zakarpattia region	30913130	PJSC «Eurocar»	ПрАТ "Єврокар"	Machine building	more than 100 mln. UAH
	32269989	"Yazaki Ukraine" LLC	ТОВ "Ядзакі Україна"	Machine building	more than 100 mln. UAH
	32836226	Jabil Circuit Ukraine Ltd LLC	ТОВ "Джейбіл Сьоркіт Юкрейн Лімітед"	Machine building	more than 100 mln. UAH
	274105	ALC "Perschyn wood-chemical plant "	ТДВ "Перечинський лісохімічний комбінат"	Manufacture of chemicals and chemical products	more than 100 mln. UAH
	33285430	"Gentherm Ukraine" LLC	ТОВ "Джентерм Україна"	Machine building	more than 100 mln. UAH
	32221224	"Flexronix Factory" LLC	ТОВ Завод "Флекстріонікс "	Machine building	more than 100 mln. UAH
	34022671	LLC "Interfil"	ТОВ "Інтерфіл"	Manufacture of chemicals and chemical products	more than 100 mln. UAH
	22071242	LLC "Eno Furniture LTD"	ТОВ "Ено Меблі ЛТД"	Furniture production	more than 100 mln. UAH



## ITFC - Ukrainian Industry Expertise

Region	ID code	Company name (English)	Company name (Ukrainian)	Sector	Revenues
	33537974	"Rusinia" LLC	ТОВ "Русинія"	Production of construction materials	more than 100 mln. UAH
	32653583	"Forshner Ukraine" LLC	ТОВ "Форшнер Україна"	Machine building	more than 100 mln. UAH
Volyn region	5745160	PJSC "SKF Ukraine"	ПАТ "СКФ Україна"	Machine building	more than 100 mln. UAH
	21751578	Joint Ukrainian-Polish Company "Modern-Expo" LLC	Спільне Українсько-Польське Підприємство ТОВ "Модерн-Експо"	Furniture production	more than 100 mln. UAH
	33537560	"Kromberg and Schubert Ukraine" LLC	ТОВ "Кромберг Енд Шуберт Україна "	Machine building	more than 100 mln. UAH
	8029701	SE "Lutsk repair plant" Motor "	ДП "Луцький ремонтний завод "Мотор"	Machine building	more than 100 mln. UAH
	25093118	PJSC "Joint Ukrainian-Slovak Company" Terichem-Lutsk "	ПрАТ "Спільне Українсько-Словацьке Підприємство "Теріхем-Луцьк"	Manufacture of rubber and plastic products	more than 100 mln. UAH
	21752230	Subsidiary enterprise " Auto-Assembly Plant №1" PJSC "Automobile Company" Bogdan Motors "	Дочірнє підприємство "Автоскладальний завод №1" ПАТ "Автомобільна компанія "Богдан Моторс"	Machine building	more than 100 mln. UAH
	30088756	"Herbor-Holding" LLC	ТОВ "Гербор-Холдінг"	Furniture production	more than 100 mln. UAH
	31976055	"BRV-Ukraine" LLC	ТОВ "БРВ-УКРАЇНА"	Furniture production	more than 100 mln. UAH
	33731798	LLC "Lad Beton"	ТОВ "Лад Бетон"	Production of construction materials	more than 100 mln. UAH
	31533318	LLC "Production Association" Kovelsilmash "	ТОВ "Виробниче Об'єднання "Ковельсільмаш"	Metalworking	more than 100 mln. UAH

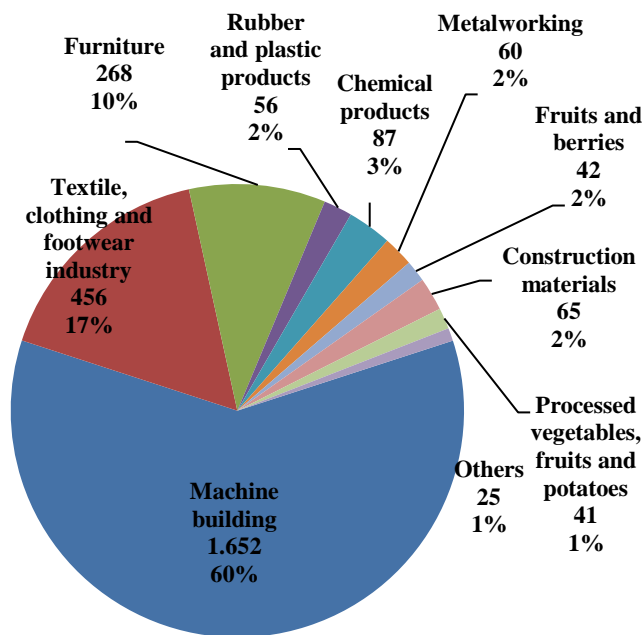
### 1.3. Export by sectors and regions

In 2016, the volume of exports in sectors under study in Western Ukrainian regions amounted to about USD 2 752 million, of which almost 36% was generated by Zakarpattia region (USD 988 million) and 28% was generated by Lviv region (USD 772 million).

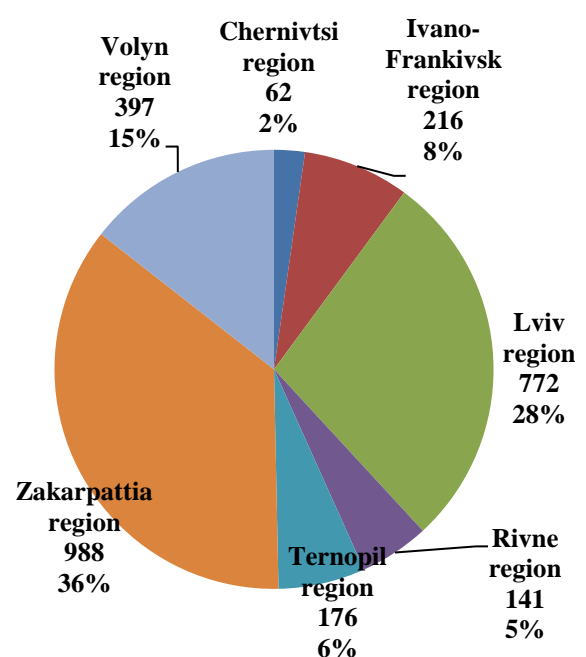
Machine building products and textile, clothing and footwear industry products dominate in the commodity structure of exports (77% of total exports).

**Table 1.8. Regional pattern of export of sectors under study in 2016, million USD**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Furniture	11,1	4,2	130,5	30,3	1,0	48,8	42,1	268,0
Machine building products	12,6	123,1	340,4	13,7	146,7	723,2	292,0	1 651,7
Chemical products	1,1	11,8	9,3	27,6	9,7	21,6	5,7	86,8
Rubber and plastic products	1,0	20,3	8,4	1,4	4,4	6,0	14,7	56,2
Metalworking	1,9	2,1	33,4	3,8	1,4	8,7	8,6	59,8
Dairy products			0,1	0,2	0,3		11,7	12,3
Processed vegetables, fruit, berries, mushrooms and potatoes	5,2	1,0	23,4	0,4	5,1	2,4	3,5	41,2
Fruits and berries	9,1	1,2	7,7	11,5	0,8	6,3	5,7	42,2
Vegetables and mushrooms;	1,3	0,7	2,8	2,6	0,6	2,2	2,7	13,0
Construction materials	0,3	12,3	13,2	36,9	0,4	0,6	1,5	65,3
Textile, clothing and footwear	18,7	39,1	202,5	12,8	5,7	167,9	8,9	455,6
<b>TOTAL</b>	<b>62,3</b>	<b>215,8</b>	<b>771,6</b>	<b>141,2</b>	<b>176,1</b>	<b>987,7</b>	<b>397,3</b>	<b>2 752,1</b>



**Fig. 1.3. Export goods structure of sectors under study by subsectors, mln. USD**



**Fig. 1.4. Regional breakdown of sectors under study products export, mln. USD**



Fig. 1.5. 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 machine-building (216%), production of fruits and berries (206%), and textile, clothing and footwear industry (166%). Excess of exports over sales 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).

The high export orientation is also observed in furniture production (122%), production and processing of fruits and vegetables (65%).

In other sectors, the share of foreign sales markets in sales is either low (about 25-30% - in the chemical industry and in the manufacture of rubber and plastic products), or insignificant (less than 20% - construction materials production and dairy production).

**Table 1. 9. The share of exports in the sales of sectors under study in 2016, thousand USD**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Furniture production	90%	56%	190%	86%	22%	210%	62%	122%
Machine building	60%	162%	178%	44%	269%	314%	181%	216%
Manufacture of chemicals and chemical products	27%	24%	19%	21%	36%	49%	90%	28%
Manufacture of rubber and plastic products	5%	97%	8%	8%	12%	89%	37%	23%
Metalworking	15%	21%	46%	19%	15%	212%	73%	43%
Processing and preserving of fruit and vegetables	54%	43%	132%	7%	36%	28%	61%	65%
Production and processing of milk	0%	0%	0%	0%	0%	0%	63%	5%
Production of fruits and berries	131%	100%	241%	2160%	30%	152%	287%	206%
Production of vegetables and mushrooms	234%	31%	9%	36%	7%	123%	90%	24%
Production of construction materials	2%	8%	9%	26%	1%	5%	6%	12%
Textile, clothing and footwear industry	74%	194%	173%	44%	37%	326%	54%	166%
<b>TOTAL</b>	<b>48%</b>	<b>61%</b>	<b>90%</b>	<b>28%</b>	<b>60%</b>	<b>255%</b>	<b>111%</b>	<b>95%</b>

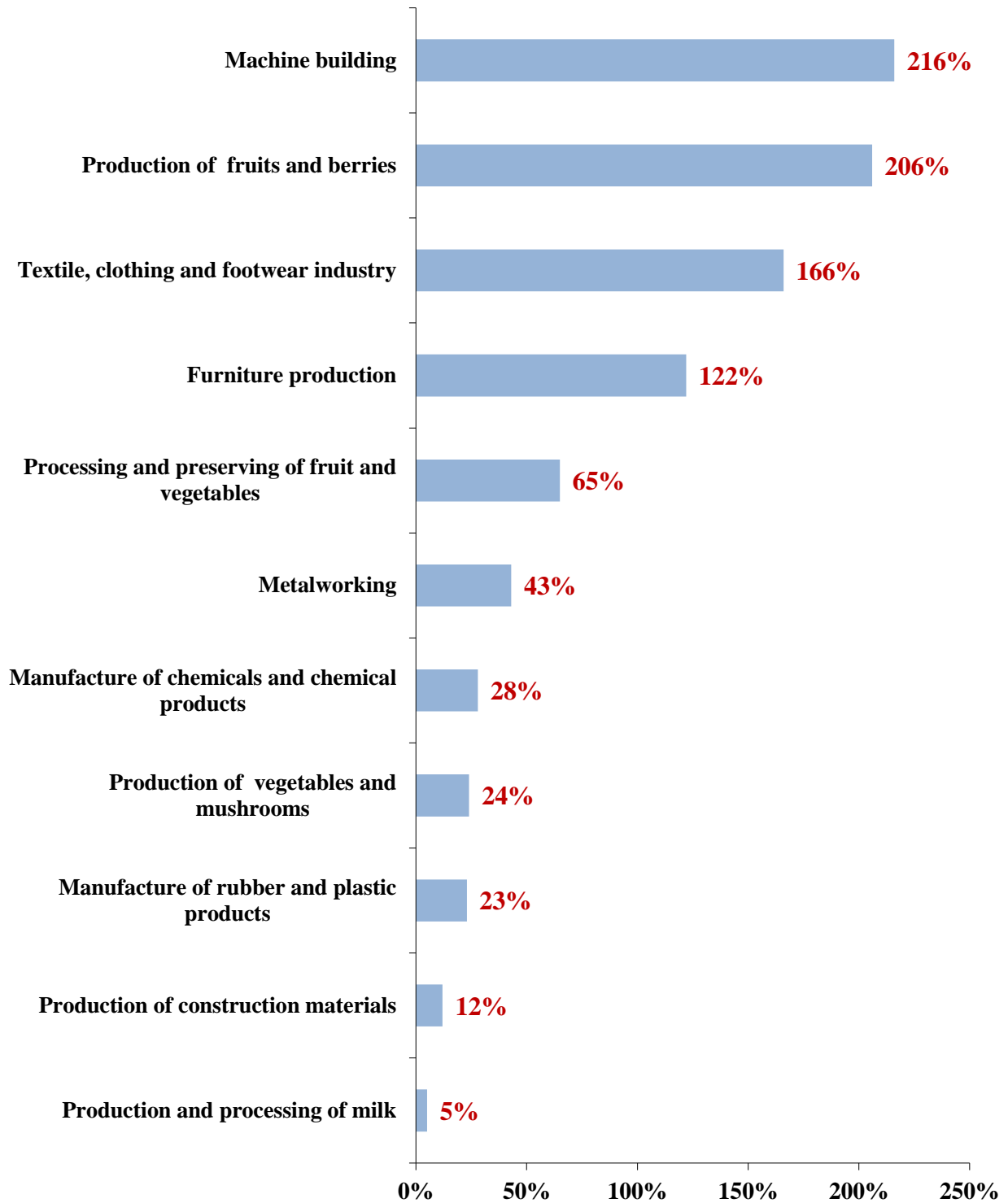


Fig. 1.6. The level of export-oriented production in sectors under study by regions in 2016, %

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

##### *Enterprises with foreign direct investment (FDI)*

As of the end of 2017, the total volume of FDI in seven Western Ukrainian regions under consideration exceeds \$ 2,7 billion. The FDI was received by 1112 companies (Tab. 1.10). The largest FDI inflow was in Lviv region (\$ 938 million, or 35%), the volume of FDI in the other regions is much smaller. The share of 7 regions in total FDI in Ukraine is 6.8%.

In 7 Western regions, FDI came from 15 countries of the world. The Netherlands is in the top 3 countries, after Cyprus and Poland. The total volume of FDI from the Netherlands in 7 regions amounted to 340.6 million dollars (12.7% of total FDI inflow). The Dutch FDI was made to 58 companies. Most of the Dutch investments came in Ivano-Frankivsk region (\$ 208.9 million), and the least - in Volyn (only \$ 0.0 million). The share of 7 regions in total FDI from the Netherlands is 5.41%.

**Table 1.10. - The volume of FDI in the Western Ukrainian regions**

<b>Indicator</b>	<b>Million USD</b>	<b>Number of enterprises</b>
Chernivtsi region (as of October 01, 2017)	63,7	151
<i>including from the Netherlands</i>	<i>15,6</i>	<i>11</i>
Ivano-Frankivsk region (as of December 31, 2017)	908,6	184
<i>including from the Netherlands</i>	<i>208,9</i>	<i>4</i>
Ternopil region (as of December 31, 2017)	45,2	143
<i>including from the Netherlands</i>	<i>0,3</i>	<i>3</i>
Rivne region (as of December 31, 2017)	134,2	112
<i>including from the Netherlands</i>	<i>3,6</i>	<i>2</i>
Volyn region (as of December 31, 2017)	251,3	204
<i>including from the Netherlands</i>	<i>0</i>	<i>0</i>
Zakarpattia region (as of December 31, 2017)	326,2	101
<i>including from the Netherlands</i>	<i>63,3</i>	<i>21</i>
Lviv region (as of December 31, 2017)	937,7	217
<i>including from the Netherlands</i>	<i>48,9</i>	<i>17</i>
<b>Total 7 areas</b>	<b>2 666,9</b>	<b>1 112</b>
<i>including from the Netherlands</i>	<i>340,6</i>	<i>58</i>
<b>Total Ukraine</b>	<b>39 144</b>	
<i>including from the Netherlands</i>	<i>6 293</i>	
<b>The share of 7 regions in FDI in Ukraine, %</b>	<b>6,81%</b>	
<i>including from the Netherlands</i>	<i>5,41%</i>	

Sources: State Statistics Service of Ukraine, regional statistical offices

As of October 1, 2017, in Chernivtsi region, the volume of FDI amounted to \$ 63.7 million (Table 1.11). Main areas of investment are the processing industry (\$ 27.1 million), agriculture (\$ 11.2 million) and trade (\$ 7.6 million). In the processing industry the key areas are food industry and wood processing, in agriculture - horticulture.

**Table 1.11. The structure of FDI by types of economic activity in Chernivtsi region as of October 1, 2017**

Type of economic activity	Economic activity code-2010	Thousand USD	%
<b>Total</b>		<b>63 720,3</b>	<b>100,0</b>
Agriculture, forestry and fishing	A	11 245,6	17,6
Industry	B+C+D+E	29 720,4	46,6
mining and quarrying	B	2 009,9	3,2
manufacturing	C	27 149,4	42,6
electricity, gas, steam and air conditioning supply	D	... <sup>1</sup>	... <sup>1</sup>
water supply; sewerage; waste management and remediation activities	E	... <sup>1</sup>	... <sup>1</sup>
Construction	F	2 328.8	3.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	7 562.7	11.9
Transporting and storage	H	3 324.5	5.2
Accommodation and food service activities	I	835.1	1.3
Information and communication	J	37.0	0.1
Financial and insurance activities	K	–	–
Real estate activities	L	6 663.7	10.5
Professional, scientific and technical activities	M	... <sup>1</sup>	... <sup>1</sup>
Administrative and support service activities	N	1 107.7	1.7
Public administration and defence; compulsory social security	O	–	–
Education	P	–	–
Human health and social work activities	Q	595.5	0.9
Arts, entertainment and recreation	R	... <sup>1</sup>	... <sup>1</sup>
Other services activities	S	–	–

<sup>1</sup> 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, 2017, in Ivano-Frankivsk region, the volume of FDI amounted to \$ 908.6 million (Table 1.12). The main investment areas are the processing industry (\$ 664.7 million), agriculture (\$ 70.1 million) and trade (\$ 108.7 million).

In the processing industry, the largest investment (\$ 595 million) was from Lukoil oil company to modernize and expand production at the Karpatnaftokhim chemical plant (full cycle PVC and polyethylene production). Also, large investments were made in machine building (cable production for automotive industry) and in wood processing (sawmilling).

**Table 1.12. The structure of FDI by types of economic activity in Ivano-Frankivsk region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>908 550.7</b>	<b>100.0</b>
Agriculture, forestry and fishing	A	70 096.8	7.7
Industry	B+C+D+E	675 285.3	74.3
mining and quarrying	B	4 513.0	0.5
manufacturing	C	664 709.4	73.2
electricity, gas, steam and air conditioning supply	D	... <sup>1</sup>	... <sup>1</sup>
water supply; sewerage; waste management and remediation activities	E	... <sup>1</sup>	... <sup>1</sup>
Construction	F	24 452.3	2.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	108 680.7	12.0
Transporting and storage	H	7 768.1	0.9
Accommodation and food service activities	I	10 304.7	1.1
Information and communication	J	307.3	0.0
Financial and insurance activities	K	... <sup>1</sup>	... <sup>1</sup>
Real estate activities	L	8 519.0	0.9
Professional, scientific and technical activities	M	308.4	0.0
Administrative and support service activities	N	1 736.8	0.2
Public administration and defence; compulsory social security	O	–	–
Education	P	... <sup>1</sup>	... <sup>1</sup>
Human health and social work activities	Q	7.2	0.0
Arts, entertainment and recreation	R	–	–
Other services activities	S	–	–

<sup>1</sup> 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, 2017 in Ternopil region, the volume of FDI amounted to \$ 45.2 million (Table 1.13). Main areas of investment are the processing industry (\$ 25.2 million), transport (\$ 9.2 million) and agriculture (\$ 4.6 million). The processing industry has major investments in the food industry.



**Table 1.13. The structure of FDI by types of economic activity in Ternopil region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>45 226.7</b>	<b>100.0</b>
Agriculture, forestry and fishing	A	4 581.9	10.1
Industry	B+C+D+E	25 908.9	57.3
mining and quarrying	B	... <sup>1</sup>	... <sup>1</sup>
manufacturing	C	25 224.7	55.8
electricity, gas, steam and air conditioning supply	D	158.9	0.4
water supply; sewerage; waste management and remediation activities	E	... <sup>1</sup>	... <sup>1</sup>
Construction	F	62.4	0.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	263.0	0.6
Transporting and storage	H	9 168.1	20.3
Financial and insurance activities	K	... <sup>1</sup>	... <sup>1</sup>
Real estate activities	L	1 842.2	4.1
Administrative and support service activities	N	3 085.3	6.8
Other services activities	S	68.0	0.1

<sup>1</sup> 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, 2017 in Rivne region, the volume of FDI amounted to \$ 134.2 million (Table 1.14). Main areas of investment are the processing industry (\$ 61.4 million), transport (\$ 27.2 million) and construction (\$ 33.4 million). The processing industry has major investments in the food industry.

**Table 1.14. The structure of FDI by types of economic activity in Rivne region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>134 187,3</b>	<b>100,0</b>
Agriculture, forestry and fishing	A	2 242,2	1,7
Industry	B+C+D+E	61 400,6	45,7
mining and quarrying	B	15 190,3	11,3
manufacturing	C	45 122,8	33,6
electricity, gas, steam and air conditioning supply, water supply; sewerage; waste management and remediation activities	D+E	1 087,5	0,8
Construction	F	33 363,0	24,9
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	6 030,8	4,5
Transporting and storage	H	27 244,0	20,3
Real estate activities	L	1 697,2	1,3
Professional, scientific and technical activities	M	1 221,8	0,9
Administrative and support service activities	N	936,5	0,7
Other services activities	S	51,2	0,0

Source: Regional Statistics Department.

As of December 31, 2017 in Volyn region, the volume of FDI amounted to \$ 251.3 million (Table 1.15). Main areas of investment are the processing industry (\$ 181.4 million), wholesale and retail trade (\$ 28.1 million) and real estate activities (\$ 10.7 million). The processing industry has major investments in the food industry.

**Table 1.15. The structure of FDI by types of economic activity in Volyn region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>251 259,6</b>	<b>100,0</b>
Agriculture, forestry and fishing	A	129 68,6	5,2
Industry	B+C+D+E	181 431,6	72,2
mining and quarrying	B	... <sup>1</sup>	... <sup>1</sup>
manufacturing	C	180 854,9	72,0
electricity, gas, steam and air conditioning supply, water supply; sewerage; waste management and remediation activities	D+E	... <sup>1</sup>	... <sup>1</sup>

Type of economic activity	Economic activity code-2010	Thousand US\$	%
Construction	F	31,7	0,0
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	28 136,6	11,2
Transporting and storage	H	1 007,0	0,4
Accommodation and food service activities	I	61,0	0,0
Information and communication	J	0,8	0,0
Financial and insurance activities	K	... <sup>1</sup>	... <sup>1</sup>
Real estate activities	L	10 726,5	4,3
Professional, scientific and technical activities	M	1 670,6	0,7
Administrative and support service activities	N	7 085,8	2,8
Education	P	... <sup>1</sup>	... <sup>1</sup>
Human health and social work activities	Q	... <sup>1</sup>	... <sup>1</sup>
Arts, entertainment and recreation	R	... <sup>1</sup>	... <sup>1</sup>

<sup>1</sup> 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, 2017 in Zakarpattia region, the volume of FDI amounted to \$ 326.2 million (Table 1.16). Main areas of investment are the processing industry (\$ 268.1 million), transport (\$ 20.9 million) and real estate activities (\$ 13.8 million).

**Table 1.16. The structure of FDI by types of economic activity in Zakarpattia region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>326 172,0</b>	<b>100,0</b>
Agriculture, forestry and fishing	A	2 698,7	0,8
Industry	B+C+D+E	268 116,0	82,2
mining and quarrying	B	911,4	0,3
manufacturing	C	265 577,2	81,4
electricity, gas, steam and air conditioning supply, water supply; sewerage; waste management and remediation activities	D+E	1 627,4	0,5
Construction	F	2 141,1	0,7
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	3 280,7	1,0
Transporting and storage	H	20 897,4	6,4
Accommodation and food service activities	I	6 831,3	2,1
Real estate activities	L	13 813,3	4,2
Administrative and support service activities	N	7 378,6	2,3
Human health and social work activities	Q	671,2	0,2
Other services activities	S	343,3	0,1

Source: Regional Statistics Department.

As of December 31, 2017 in Lviv region, the volume of FDI amounted to \$ 937.7 million (Table 1.17). Main areas of investment are the processing industry (\$ 497.4 million), administrative and support service activities (\$ 74.6 million) and real estate activities (\$ 89 million).

**Table 1.17. The structure of FDI by types of economic activity in Lviv region as of December 31, 2017**

Type of economic activity	Economic activity code-2010	Thousand US\$	%
<b>Total</b>		<b>937 736</b>	<b>100,0</b>
Agriculture, forestry and fishing	A	40 313	4,3
Industry	B+C+D+E	497 370	53,1
mining and quarrying	B	24 084	2,6
manufacturing	C	410 563	43,8
electricity, gas, steam and air conditioning supply, water supply; sewerage; waste management and remediation activities	D+E	61 723	6,7
Construction	F	19 052	2,0
Wholesale and retail trade; repair of motor vehicles and motorcycles	G	49 464	5,3
Transporting and storage	H	13 663	1,5
Accommodation and food service activities	I	7 941	0,8
Real estate activities	L	89 027	9,5
Administrative and support service activities	N	74 552	8,0
Human health and social work activities	Q	5 911	0,6
Other services activities	S	140 443	14,9

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 and Trade of Ukraine - <http://openaid.gov.ua/uk/donors>

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

Ivano-Frankivsk region – 21	Volyn region – 6
Ternopil region – 7	Rivne region - 5
Chernivtsi region – 7	Lviv region - 8
Zakarpattia region – 10	

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

Table 1.18. List of organizations - participants of donor programs in Ivano-Frankivsk region

No	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
1	Vasyl Stefanyk Precarpathian National University	Прикарпатський національний університет ім. В.Стефаника	Grant	Development of professional and entrepreneurial skills by building up entrepreneurial spirit and consulting entrepreneurs-beginners.	European Union	01.12.2013	30.11.2016
2	The Association for Economic Development of the Kolomyia Region	Асоціація економічного розвитку Коломиїщини	Grant	The Creation of a Network of First Contact Centres in Ukraine	European Union	01.09.2012	31.08.2014
3	State city enterprise "Ivano-Frankivsk Teplokomunenergo" of Ivano-Frankivsk city council	Державне міське підприємство "Івано-Франківськтеплокомуненерго" Івано-Франківської міської ради	Grant	Grant of the Programme 'Demo Ukraine'	Swedish International Development Cooperation Agency (SIDA)	01.01.2012	31.12.2016
4	Kolomyia city council	Коломиїська міська рада	Grant	Partnership for Local Economic Development and Democratic Governance (PLEDDG)	Department of Foreign Affairs, Trade and Development Canada (DFATD); Government of Canada	27.03.2015	30.06.2021
5	Dolyna city council	Долинська міська рада	Grant	Partnership for Local Economic Development and Democratic Governance (PLEDDG)	Department of Foreign Affairs, Trade and Development Canada (DFATD); Government of Canada	27.03.2015	30.06.2021
6	Dolynsky region state administration, Department of culture	Долинська районна державна адміністрація, відділ культури	Grant	Implementation of energy-efficient activities in the city of Dolyna	European Union	08.02.2012	08.04.2013
7	Dolynsky region state administration, Department of education	Долинська районна державна адміністрація, відділ освіти	Grant	Implementation of energy-efficient activities in the city of Dolyna	European Union	08.02.2012	08.04.2013

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No	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
8	Dolyna city council	Долинська міська рада	Grant	Implementation of energy-efficient activities in the city of Dolyna	European Union	08.02.2012	08.04.2013
9	Charity foundation of Dolyna community	Благодійний фонд громади міста Долина	Grant	Implementation of energy-efficient activities in the city of Dolyna	European Union	08.02.2012	08.04.2013
10	Yaremche enterprise support fund	Фонд підтримки підприємництва м. Яремча	Grant	Empowerment of women in rural regions of Ivano-Frankivsk oblast in terms of business in the green tourism sector	European Union	01.11.2012	31.10.2013
11	Ivano-Frankivsk National Technical University of Oil and Gas	Івано-Франківський національний технічний університет нафти і газу	Grant	National educational infrastructure for improving innovation and entrepreneurial activities of IT-students	European Union	15.10.2012	14.10.2015
12	Non-governmental organization 'Centre for promotion of economic development of Kalush raion'	Громадська організація "Центр сприяння економічного розвитку Калушини"	Grant	ECONET - Economic Development Network for Underdeveloped Cross Border Area	European Union	01.04.2012	30.11.2013
13	Non-governmental organization 'Network for promotion of competitiveness and innovation'	Громадська організація "Мережа сприяння конкурентоспроможності та інноваційності"	Grant	ECONET - Economic Development Network for Underdeveloped Cross Border Area	European Union	01.04.2012	30.11.2013
14	Non-governmental organization 'Fund of support of entrepreneurship in Nadvirnyanschyu'	Громадська організація "Фонд підтримки підприємництва Надвірнянщини"	Grant	ECONET - Economic Development Network for Underdeveloped Cross Border Area	European Union	01.04.2012	30.11.2013
15	Ivano-Frankivsk region state administration	Івано-Франківська обласна державна адміністрація	Grant	Management of biodegradable waste in the cities of Baia Mare (Romania), Ivano-Frankivsk and Kolomyia (Ukraine)	European Union	20.09.2013	19.11.2015

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No	Organization name (ENG)	Organization name (UKR)	Type of financing	Project name	Donor	Starting date	Date of completion
16	Non-governmental organization 'Association of economic development of Ivano-Frankivschyna'	Громадська організація "Асоціація економічного розвитку Івано-Франківщини"	Grant	Promotion of investment opportunities and cooperation between small and medium businesses through development of cross border connections in the Carpathian region	European Union	01.01.2014	31.08.2015
17	Agricultural service cooperative 'Chysta Flora'	Сільськогосподарський обслуговуючий кооператив "Чиста Флора"	Grant	Project Agroinvest in Ukraine	United States Agency for International Development (USAID); U.S. Government	25.01.2011	24.01.2016
18	Agricultural service cooperative 'Zolota Bdzhilka'	Сільськогосподарський обслуговуючий кооператив "Золота бджілка"	Grant	Project Agroinvest in Ukraine	United States Agency for International Development (USAID); U.S. Government	25.01.2011	24.01.2016
19	Regional fund of support of entrepreneurship in Ivano-Frankivsk oblast	Регіональний фонд підтримки підприємництва по Івано-Франківській області	Grant	Increase of entrepreneurial potential of the border region by creating institutions that support entrepreneurship	European Union	09.12.2010	09.06.2013
20	Dolyna city council	Долинська міська рада	Grant	Reduction of energy consumption and CO2 emissions in sector of multi-apartment residential buildings in Dolyna	European Union	01.01.2015	30.04.2018
21	Municipal enterprise 'Communal property administration' of Dolyna city council	Комунальне підприємство "Управління комунального майна" Долинської міської ради	Grant	Reduction of energy consumption and CO2 emissions in sector of multi-apartment residential buildings in Dolyna	European Union	01.01.2015	30.04.2018

Table 1.19. List of organizations - participants of donor programs in Ternopil region

№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
1	Ternopil Ivan Puluj National Technical University	Тернопільський національний технічний університет імені Івана Пулюя	Grant	Creating a Network and Infrastructure for Supporting Youth Innovation Entrepreneurship on the "FabLab" Platform	The European Union	15.10.2015	14.10.2018
2	Agricultural servicing cooperative "Losyatynske molochne dzherelo"	Сільськогосподарський обслуговуючий кооператив "Лосятинське молочне джерело"	Grant	AgroInvest Project in Ukraine	United States Agency for International Development, USAID; The Cabinet of the United States	25.01.2011	24.01.2016
3	Department of Education of Husyatynska District State Administration	Відділ освіти Гусятинської районної державної адміністрації	Grant	Implementation of integrated energy saving measures at two schools in the city of Kopychyntsi, Gusyatynsky District	The European Union	27.02.2012	26.10.2014
4	Kopychinetsk City Council	Копичинецька міська рада	Grant	Implementation of integrated energy saving measures at two schools in the city of Kopychyntsi, Gusyatynsky District	The European Union	27.02.2012	26.10.2014
5	NGO "Agency of Local Development of Husyatynshchyna"	Громадська організація "Агенція місцевого розвитку Гусятинщини"	Grant	Implementation of integrated energy saving measures at two schools in the city of Kopychyntsi, Gusyatynsky District	The European Union	27.02.2012	26.10.2014



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№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
6	NGO "Tvoye misto"	Громадська організація "Твоє місто"	Grant	Implementation of integrated energy saving measures at two schools in the city of Kopychyntsi, Gusyatinsky District	The European Union	27.02.2012	26.10.2014
7	Communal Enterprise of Thermal Networks "Ternopilmiskteplocomunenergo" of Ternopil City Council	Комунальне підприємство теплових мереж «Тернопільміськтеплокомуненерго» Тернопільської міської ради	Grant	DemoUkraineDH - Ternopil	Swedish International Development Cooperation Agency (SIDA); The Nordic Environment Finance Corporation (NEFCO)	21.12.2016	30.11.2017

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

№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
1	Chernivtsi City Council	Чернівецька міська рада	Grant	Integrated development of cities in Ukraine	Government in the Federal Republic of Germany; Federal Ministry for Economic Cooperation and Development (BMZ)	03.12.2015	31.12.2018
2	Regional public organization "The First Agrarian Cluster"	Регіональна громадська організація "Перший аграрний кластер"	Grant	AgroInvest Project in Ukraine	United States Agency for International Development, USAID; The Cabinet of the United States	25.01.2011	24.01.2016
3	Novoseletska City Council	Новоселецька міська рада	Grant	1. Energy-efficient kindergarten in the town of Novoselitsa 2. Improved cross-border management of solid municipal waste in Ukraine, Republic of Moldova and Romania 3. Sustainable local development in rural areas of Chernivtsi and Odessa regions 4. Development and management of integrated urban development plans	1. The European Union 2. The European Union 3. Agency for the Development of Austria (APA) 4. The European Union	01.04.2012 12.05.2012 01.12.2016 16.10.2013	31.05.2013 11.05.2014 31.03.2017 15.10.2014
4	Chernivtsi Regional State Administration	Чернівецька обласна державна адміністрація	Grant	The use of European experience in combating soil erosion	The European Union	23.12.2013	23.12.2016

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№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
5	Bukovinsky Center for Reconstruction and Development	Буковинський центр реконструкції і розвитку	Grant	1. Joint Business Support Centre – Instrument for fostering development of entrepreneurship in RO-UA-MD cross-border area (Jo.B.S. Center) 2. Cross Border Ecological Agriculture Network “EcoAgriNet 2” 3. Energy-efficient kindergarten in the town of Novoselitsa	1. The European Union 2. The European Union 3. The European Union	18.09.2013 01.10.2013 01.04.2012	30.06.2015 31.03.2015 31.05.2013
6	Storozhynetska district council of Chernivtsi region	Сторожинецька районна рада Чернівецької області	Grant	Cross-border waste management tool in rural areas	The European Union	11.12.2013	31.12.2015
7	Hlybotska regional public organization "Hlybochchyna"	Глибоцька районна громадська організація «Глибоччина»	Grant	Cross-border waste management tool in rural areas	The European Union	11.12.2013	31.12.2015

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

№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
1	NGO "Agency for promotion of sustainable development of the Carpathian region "FORZA"	ГО "Агентство сприяння сталому розвитку Карпатського регіону "ФОРЗА"	Grant	Creation of conditions for the continuous training of skilled workers of the forestry working in the border regions of Slovakia and Ukraine through improvement of the system of training and establishment of practical institutional cooperation between educational institutions and forestry administrations.	The European Union	01.06.2012	31.10.2014
2	Fund for development of cross-border cooperation and special economic zones	Фонд розвитку транскордонного співробітництва та спеціальних економічних зон	Grant	Improvement of cooperation between self-government bodies and entrepreneurs of small and medium-sized business sectors in the field of socio-economic development.	The European Union	01.11.2013	30.04.2015
3	NGO "Organic Ukraine"	Громадська спілка "Органічна Україна"	Grant	Strengthening of competitiveness of the Ukrainian organic sector	Swiss State Secretary for Economic Affairs; Government of the Swiss Confederation	01.06.2012	31.12.2018
4	Regional cultural and educational organization "Matica Slovenian in Zakarpattia"	Обласна культурно-освітня організація "Матица словенська на Закарпатті"	Grant	Activation and deepening of sustainable socio-economic cooperation between the border regions of Slovakia and Ukraine	The European Union	01.06.2012	31.05.2014
5	Ukrainian-Slovak Centre for cross-border cooperation "Carpathians"	Українсько-Словацький центр транскордонного співробітництва "Карпати"	Grant	Activation and deepening of sustainable socio-economic cooperation between the border regions of Slovakia and Ukraine	The European Union	01.06.2012	31.05.2014
6	Zakarpattia Regional State Administration	Закарпатська обласна державна адміністрація	Grant	Improvement of the level of economic development of Zakarpattia region through tourism promotion and improvement	The European Union	24.07.2014	24.07.2016

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№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
7	Communal enterprise “Agency for regional development and cross-border cooperation “Zakarpattia” of Zakarpattia regional council”	Комунальне підприємство “Агентство регіонального розвитку та транскордонного співробітництва “Закарпаття” Закарпатської обласної ради”	Grant	Increasing the level of energy generation from biomass in the Ukrainian-Slovak border regions.	The European Union	15.07.2010	14.07.2012
8	NGO “Local development support centre”	ГО «Центр підтримки місцевого розвитку»	Grant	Improvement of business infrastructure in order to deepen development and cross-border cooperation between small and medium enterprises of Ukraine and Hungary.	The European Union	15.07.2010	14.07.2012
9	Charity organization “Zakarpattia agency for investments, innovation and development”	Благодійна організація "Закарпатське агентство з інвестицій, інновацій та розвитку"	Grant	Improvement of business infrastructure in order to deepen development and cross-border cooperation between small and medium enterprises of Ukraine and Hungary.	The European Union	15.07.2010	14.07.2012
10	Executive committee of Khust city council	Виконавчий комітет Хустської міської ради	Grant	Improvement of socio-economic attractiveness and competitiveness in the region of Lesko and the city of Khust during five years after the project implementation and also increase of living standards in the border regions.	The European Union	01.02.2014	30.11.2015

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

№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
1	FARM Veselka M; FARM Etalon M; FARM Zorya; FARM Cleverness; FARM Lelik; FARM LIM; FSC Lischuk N.S.; FARM Malynivka; FARM Mandzuk and K; FARM Midas; FARM Proms; FARM Revera VG; SVC Dobrotvorets; Intercessional Intercession; Milk Factory Sambirsky LLC; FOP Martynyak T.V.; FARM Slavutich-2007; Coop. Genuine Milk; Coop. Agrolviv; LLC Argovis; VCA Good Hope	ФГ “Веселка М”; ФГ “Еталон М”; ФГ “Зоря”; ФГ “Кмітливість”; ФГ “Лелик”; ФГ “ЛІМ”; ФГ “Ліщук Н.С.”; ФГ “Малинівка”; ФГ “Мандзюк і К”; ФГ “Мідас”; ФГ “Помірки”; ФГ Ревера В.Г.; СВК “Добротворець”; СОК “Покрова”; ТОВ “Молокозавод “Самбірський”; ФОП Мартиняк Т.В.; ФГ “Славутич -2007”; СОК “Справжнє молоко”; СОК “Агрольвів”; ТОВ “Арговіс”; СВК “Добра надія”	Grant	Providing services for managing two chains of additional value of agricultural products in Ukraine	Ministry of Foreign Affairs of Denmark	01.01.2014	30.06.2015
2	Lviv City Public Organization “Ecoterra”	Львівська міська громадська організація «Екотерра»	Grant	Development of the organic market in Ukraine	Swiss Secretariat for Economic Affairs; Government of Switzerland	01.06.2012	31.12.2018
3	State regulatory service of Ukraine; All-Ukrainian Association of small and medium business “Fortetsya”	Державна регуляторна служба України; Всеукраїнське об’єднання малого та середнього бізнесу “Фортеця”	Grant	“Leadership in Economic Governance” (LEV) Program	U.S. Agency for International Development (USAID); U.S. Federal Government	19.12.2014	18.12.2019
4	Glynyanska district hospital; Zolochiv district council; Zolochiv District State Administration; Zolochiv Central District Hospital; Glynyanska city council; Charity organization “Fund of Glynyan development”	Глинянська районна лікарня; Золочівська районна рада; Золочівська районна державна адміністрація; Золочівська центральна районна лікарня; Глинянська міська рада; Благодійна організація «Фонд розвитку Глинян»	Grant	Implementation of energy-saving technologies in Glynyanska District Hospital	The European Union	28.12.2012	27.09.2015

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<b>№</b>	<b>Organization name (EN)</b>	<b>Organization name (UKR)</b>	<b>Type of funding</b>	<b>Project name</b>	<b>Donor</b>	<b>Starting date</b>	<b>Date of completion</b>
5	Yavorivska district council of the Lviv region; Novorozhdilsky city council of the Lviv region; NGO Institute for Regional Development	Яворівська районна рада Львівської області; Новorozдільська міська рада Львівської області; Громадська організація «Інститут Регіонального Розвитку»	Grant	Entrepreneurship development by improving access to investment areas in the cities of Lubachiv and Gmini Lubachiv, as well as the restoration of degraded lands of the Yavoriv district and the city of Novy Rozdil.	The European Union	01.12.2013	30.11.2015
6	Lviv regional association of agricultural servicing cooperatives "Equal Rights"	Львівське обласне об'єднання сільськогосподарських обслуговуючих кооперативів "Рівноправність"	Grant	Development of dairy business in Ukraine	Foreign Affairs, Trade and Development Canada (DFATD); the Government of Canada	01.04.2014	31.03.2021
7	Lviv regional association of agricultural servicing cooperatives "Equal Rights"	Львівське обласне об'єднання сільськогосподарських обслуговуючих кооперативів "Рівноправність"	Grant	Increasing of competitiveness of the Ukrainian Dairy sector	The Canadian International Development Agency (CIDA)	31.03.2008	30.06.2013
8	Lviv regional association of agricultural servicing cooperatives "Equal Rights"	Львівське обласне об'єднання сільськогосподарських обслуговуючих кооперативів "Рівноправність"	Grant	Project Agroinvest in Ukraine	U.S. Agency for International Development (USAID); U.S. Federal Government	25.01.2011	24.01.2016

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

<b>№</b>	<b>Organization name (EN)</b>	<b>Organization name (UKR)</b>	<b>Type of funding</b>	<b>Project name</b>	<b>Donor</b>	<b>Starting date</b>	<b>Date of completion</b>
1	Volyn regional fund for entrepreneurship support	Волинський обласний фонд підтримки підприємництва	Grant	System of cross-border investor search in Poland-Ukraine	The European Union	01.06.2013	31.05.2015
2	Volyn regional charity fund "European vector"	Волинський обласний благодійний фонд «європейський вектор»	Grant	Time for business. Creating conditions for entrepreneurship development in rural areas of the Volyn region of Ukraine and Lublin province of Poland through diversification of agricultural production.	The European Union	01.09.2013	30.04.2015
3	NGO "Volynska regional agrarian advisory service"	Громадська організація «Волинська обласна аграрна дорадча служба»	Grant	Time for business. Creating conditions for entrepreneurship development in rural areas of the Volyn region of Ukraine and Lublin province of Poland through diversification of agricultural production.	The European Union	01.09.2013	30.04.2015
4	Gorokhivska district council of the Volyn region	Горохівська районна рада Волинської області	Grant	Time for business. Creating conditions for entrepreneurship development in rural areas of the Volyn region of Ukraine and Lublin province of Poland through diversification of agricultural production.	The European Union	01.09.2013	30.04.2015
5	Communal Institution of the Volyn regional council "Eurasian development Agency "Bug"	Комунальна установа Волинської обласної ради «Агенція розвитку євро регіону «Буг»	Grant	Creation of the single information base of farms of transboundary association of Euroregion "Bug"	The European Union	01.10.2013	31.12.2015
6	Manevytska district council of the Volyn region	Маневицька районна рада Волинської області	Grant	Development of agricultural activity of Manevytska district of the Volyn region	The European Union	02.10.2014	01.02.2017



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

№	Organization name (EN)	Organization name (UKR)	Type of funding	Project name	Donor	Starting date	Date of completion
1	National nuclear energy generating company "Energoatom"; Rivnenska Nuclear Power Plant	Національна атомна енергогенеруюча компанія "Енергоатом"; Рівненська АЕС	Grant	Installment for the processing of solid radioactive waste for Rivne Nuclear power plant. Waste collection, fragmentation and sorting equipment (Lot 1)	The European Union	19.01.2009	19.11.2014
2	National nuclear energy generating company "Energoatom"; Rivnenska Nuclear power plant	Національна атомна енергогенеруюча компанія "Енергоатом"; Рівненська АЕС	Grant	Installment for the processing of solid radioactive waste for Rivne Nuclear power plant (Lot 4)	The European Union	03.07.2008	02.07.2011
3	Agricultural Service Cooperative "Zahidnyi"	Сільськогосподарський обслуговуючий кооператив "Західний"	Grant	Project Agroinvest in Ukraine	U.S. Agency for International Development (USAID); U.S. Federal Government	25.01.2011	24.01.2016
4	Executive committee of the Rivne city council	Виконавчий комітет Рівненської міської ради	Grant	Development of small and medium entrepreneurship in the cities of Rivne and Lyublin	The European Union	01.05.2013	31.12.2015
5	Volodymyretska district council of Rivne region	Володимирецька районна рада Рівненської області	Grant	Development of agricultural activity of Manevtsky district of the Volyn region and Volodymyretsky district of the Rivne region	The European Union	02.10.2014	01.02.2017

### 1.5. Sectors' sales channels. Retails share in sales

According to the results of companies' survey, the highest level of sales through retail networks is observed in the segment of furniture, dairy products and fresh fruits and vegetables (about 40% of sales each), while the smallest - in sales of machine-building products (7%), rubber and plastics products (10%) and chemical products (14%).

Detailed information on retail sales is provided in respective sectoral chapters.

### 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 Western regions of Ukraine, in particular in Lviv, Rivne, Ternopil, Zakarpattia, Chernivtsi, Ivano-Frankivsk and Volyn Regions. The list of the interviewed companies is presented in the Annex 1<sup>1</sup>.

**Total phone calls:** 169.

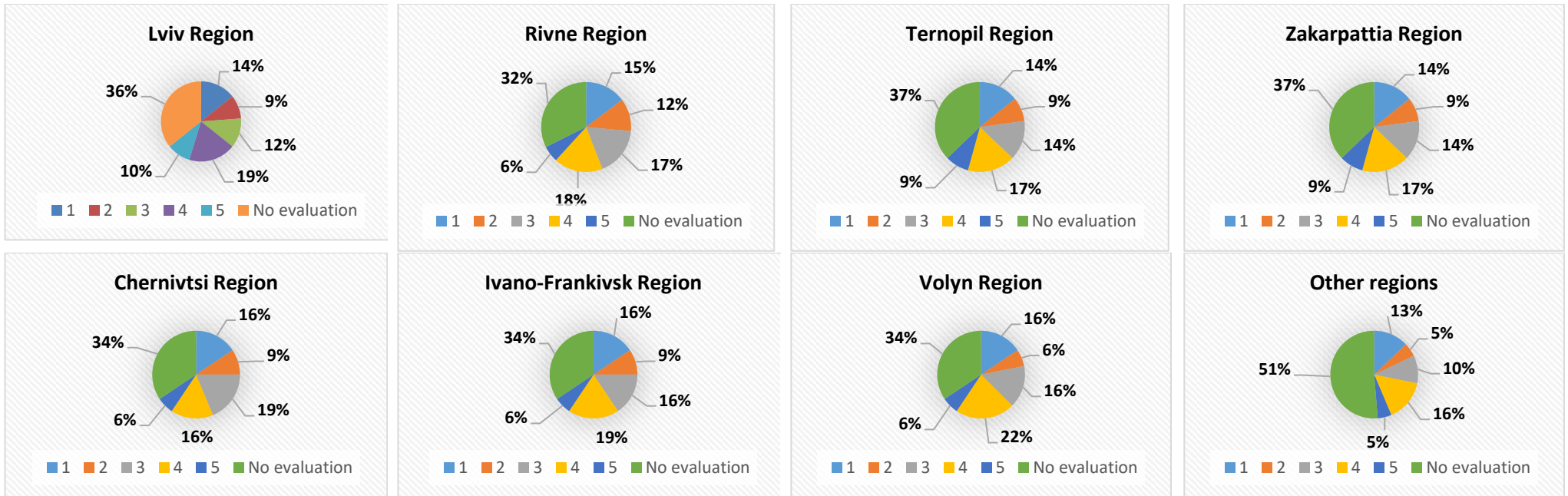
**Answered phone calls:** 58 (out of which 46 is Dutch companies and 12 is other foreign companies).

#### **Average evaluation value per region\***

Lviv	3,0	Zakarpattia	2,95	Volyn	2,95
Rivne	2,83	Chernivtsi	2,81	Other	2,89
Ternopil	2,95	Ivano-Frankivsk	2,86		

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

<sup>1</sup> The survey of foreign companies within this research was conducted with the assistance of the EBA Western Ukrainian Office ([https://eba.com.ua/en/regional\\_office/lvivskyj-ofis](https://eba.com.ua/en/regional_office/lvivskyj-ofis))



**Fig. 1.7. 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' = respondents refuse to evaluate or confirm no interaction with local authorities)

## 1.7. Access of the business to business / invest information

### Ivano-Frankivsk region

Information about investment opportunities in Ivano-Frankivsk region is available at the Ivano-Frankivsk Regional State Administration (RSA) website - <http://www.if.gov.ua>.

There you can find the following information:

- Investment projects and proposals by the region
- List of donors and actual competitive projects (programs) for financial support
- Cross-border cooperation programs (e.g. Polish development assistance for SME)
- List of investment proposals in Verkhovynskiy region
- Foreign economic activity information of Galytskyi region etc.

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

**Table 1.25. Access of the business to business / invest information in Ivano-Frankivsk region**

<b>Business/Invest information</b>	<b>Description</b>	<b>Links</b>
Investment proposals	Information about investment projects and proposals in the region	<a href="http://www.if.gov.ua/news/37324">http://www.if.gov.ua/news/37324</a>
	List of investment proposals in Verkhovynskiy region	<a href="http://ww2.gov.if.ua/verhovynska/ua/15701.htm">http://ww2.gov.if.ua/verhovynska/ua/15701.htm</a> <a href="http://ww2.gov.if.ua/verhovynska/ua/16828.htm">http://ww2.gov.if.ua/verhovynska/ua/16828.htm</a>
	Milk Farm in the Vikno village, Horodenkivskiy region	<a href="http://horodenkarda.gov.ua/virobnichi-primishhennya-2/">http://horodenkarda.gov.ua/virobnichi-primishhennya-2/</a> <a href="http://ww2.gov.if.ua/dolynska/ua/6133.htm">http://ww2.gov.if.ua/dolynska/ua/6133.htm</a>
Investment information	Ivano-Frankivsk Regional Investment and Development Center	<a href="http://www.investin.if.ua">http://www.investin.if.ua</a>
	Information about investment projects in Bogorodchansky region	<a href="http://bogorda.if.gov.ua/index.php?option=com_content&amp;view=article&amp;id=8033&amp;Itemid=448">http://bogorda.if.gov.ua/index.php?option=com_content&amp;view=article&amp;id=8033&amp;Itemid=448</a> <a href="http://bogorda.if.gov.ua/index.php?option=com_content&amp;view=article&amp;id=7219&amp;Itemid=386">http://bogorda.if.gov.ua/index.php?option=com_content&amp;view=article&amp;id=7219&amp;Itemid=386</a>

Business/Invest information	Description	Links
Grants and donors	List of donors and actual competitive projects (programs) for financial support	<a href="http://www.if.gov.ua/files/uploads/Гранти.pdf">http://www.if.gov.ua/files/uploads/Гранти.pdf</a>
Cross-border cooperation program	Polish development assistance for SME	<a href="http://www.if.gov.ua/files/uploads/Гранскордонні_програми.pdf">http://www.if.gov.ua/files/uploads/Гранскордонні_програми.pdf</a>
Department of International Cooperation	Department of International Cooperation, European Integration and Development of Tourist Infrastructure of the Regional State Administration	<a href="http://www.if.gov.ua/news/31256">http://www.if.gov.ua/news/31256</a>
Foreign economic activity information	Presentation of export-oriented companies of Galytskiy region. Driada IF company.	<a href="http://ww2.gov.if.ua/galytska/ua/15354.htm">http://ww2.gov.if.ua/galytska/ua/15354.htm</a>
Euro-Carpathian Initiative	The main objective of the project is to show attractiveness of the investment climate in the region and its openness as a result of combining natural and developed potentials of the region with opportunities of domestic and European investors.	<a href="http://ww2.gov.if.ua/dolynska/ua/12706.htm">http://ww2.gov.if.ua/dolynska/ua/12706.htm</a>
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 Ivano-Frankivsk.	<a href="http://www.eu4business.eu/uk/project/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini">http://www.eu4business.eu/uk/project/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini</a>
	Ukrainian Support Fund of SME	<a href="http://ufpp.gov.ua/program/financial_support">http://ufpp.gov.ua/program/financial_support</a>
	Regional Fund of SME support of Ivano-Frankivsk region	<a href="https://rfpp.if.ua/">https://rfpp.if.ua/</a>
Business Community Club of Ivano-Frankivsk	Business Community Club is the Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep their own business word.	<a href="https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLwY_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf">https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLwY_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf</a>
“Business incubator”	Center for SME Development "Business Incubator" is the newest structural unit based on the higher educational institution, which promotes business	<a href="https://nung.edu.ua/departament/еконіміки-та-управління-в-нафтогазовому-комплексі/бі">https://nung.edu.ua/departament/еконіміки-та-управління-в-нафтогазовому-комплексі/бі</a>

Business/Invest information	Description	Links
	development in Ivano-Frankivsk region and helps students with economic and managerial training to develop their organizational skills in doing their own business.	
Canadian business support experience	In October 2016, Kent McMullin - leading specialist in Business Management Strategies for Sustainable Economic Development, City of Edmonton (Alberta, Canada) - visited Ivano-Frankivsk to meet representatives of business community, civil society organizations, municipal officials and share Canadian experience in promoting business development.	<a href="http://versii.if.ua/novunu/kanadskiy-dosvid-z-pidtrimki-biznesu-predstavili-v-ivano-frankivsku/">http://versii.if.ua/novunu/kanadskiy-dosvid-z-pidtrimki-biznesu-predstavili-v-ivano-frankivsku/</a>
Investment Club	Investment Club of Ivano-Frankivsk	<a href="http://if-invest-club.at.ua">http://if-invest-club.at.ua</a>
Business Forum	Business Forum “The Country of Entrepreneurs”	<a href="https://www.facebook.com/events/1239629916132058/">https://www.facebook.com/events/1239629916132058/</a> <a href="http://ukrrp.org/eu4business-week-forum-donoriv-u-sferi-pidtrimki-malogo-i-serednogo-biznesu/">http://ukrrp.org/eu4business-week-forum-donoriv-u-sferi-pidtrimki-malogo-i-serednogo-biznesu/</a>
	Forum “Business Trends 2018”. The purpose of the forum is to share the best practices of the best experts, practitioners in the field of strategic management and promotion of internet business.	<a href="http://www.blitz.if.ua/news/forum-biznes-trendy-2018.html">http://www.blitz.if.ua/news/forum-biznes-trendy-2018.html</a> <a href="https://www.youtube.com/watch?v=jL1I_zqjB4s">https://www.youtube.com/watch?v=jL1I_zqjB4s</a>
	Business Forum “Ukraine – the country of entrepreneurs” was held on 2016. The program includes a panel discussion "Prospects for Small Business Development in Ukraine: State Programs and Initiatives Support" as well as "Business in Ukraine: The Way to Success", which involves presentation	<a href="https://www.unian.ua/business/1680272-v-ivano-frankivsku-rozpochav-robotu-biznes-forum-ukrajina-krajina-pidpriemstv.html">https://www.unian.ua/business/1680272-v-ivano-frankivsku-rozpochav-robotu-biznes-forum-ukrajina-krajina-pidpriemstv.html</a> <a href="https://westnews.com.ua/v-ivano-frankivsku-vidbuvsya-biznes-">https://westnews.com.ua/v-ivano-frankivsku-vidbuvsya-biznes-</a>

Business/Invest information	Description	Links
	of local entrepreneurs willing to share their successful experiences.	<a href="http://forum-ukrayina-krayina-pidpriyemtsiv-foto/">forum-ukrayina-krayina-pidpriyemtsiv-foto/</a>
Business magazine	Business magazine “Delovoy”	<a href="http://www.dilovyi.com.ua/stats.php">http://www.dilovyi.com.ua/stats.php</a>
Eco benefits	The Regional State Administration intends to financially support agricultural producers who deal with organic farming and livestock farming. The support of local producers is partial compensation them for production costs. Approximately, this compensation is around 5% of the cost.	<a href="https://zbruc.eu/node/4191">https://zbruc.eu/node/4191</a>
II International Forum of partner cities	The Forum main purpose is to demonstrate economic and investment potential of Ivano-Frankivsk, to intensify cooperation of business circles in the production of goods and services, and to present actual infrastructure projects of the city.	<a href="https://mi100.info/2017/10/27/v-ivano-frankivsku-startuvav-iii-mizhnarodnyj-forum-partnerskyh-mist/">https://mi100.info/2017/10/27/v-ivano-frankivsku-startuvav-iii-mizhnarodnyj-forum-partnerskyh-mist/</a>
Workshop of opportunity for business and investment activities in Germany (23/09/2017)	Familiarization of businessmen of Ivano-Frankivsk region with conditions of export-import activity, production and commercial cooperation with German firms; Preparation for participation of Ukrainian enterprises in the third German-Ukrainian Business Forum in Germany.	<a href="http://cci.if.ua/?event-page=2">http://cci.if.ua/?event-page=2</a>

**Ternopil region**

The business and invest information in Ternopil region is available and provided enough. Good access to the above mentioned information is provided by the Ternopil Regional State Administration (RSA) website:

- International support programs related to small and medium enterprises (SME) in Ukraine. More than 10 international organizations provided their support for Ukrainian SME in Ternopil region;
- Information about European Union programs which provide support to Ukrainian business. More than 14 programs from the EU organization presented for supporting Ukrainian SME;
- Taxation and Investment in Ukraine 2016;
- The Law of Ukraine on the Regime of Foreign Investments;
- Presentation of foreign investment cooperation of Ternopil Region;
- Incentive provisions of certain Ukrainian legislative acts which investors can use for project implementation.

There is also available information about foreign proposals. You can find the proposals for international cooperation from such countries as: China, South Africa, Tajikistan, Australia, Egypt, Germany, Belorussia and the Netherlands.

For more detailed information, see the table below.

**Table 1.26. Access of the business to business / invest information in Ternopil region**

<b>Business/Invest information</b>	<b>Description</b>	<b>Links</b>
Foreign investment cooperation	Information about European Union programs which provide support to Ukrainian business. Taxation and Investment in Ukraine 2016. The Law of Ukraine on the Regime of Foreign Investments. Presentation of foreign investment cooperation of Ternopil Region. Incentive provisions of Ukrainian certain legislative acts which investors can use for project implementation. International support programs related to small and medium business in Ukraine.	<a href="http://www.oda.te.gov.ua/main/ua/655.htm">http://www.oda.te.gov.ua/main/ua/655.htm</a>  <a href="http://www.oda.te.gov.ua/data/upload/publication/main/ua/789/program_ms2017_2018.pdf">http://www.oda.te.gov.ua/data/upload/publication/main/ua/789/program_ms2017_2018.pdf</a>  <a href="http://www.oda.te.gov.ua/data/upload/publication/main/ua/26830/spivrobotni2016.pdf">http://www.oda.te.gov.ua/data/upload/publication/main/ua/26830/spivrobotni2016.pdf</a>
Business partners searching	Commercial offers of foreign companies, including The Dutch company “Friesland Campina” (one of the	<a href="http://www.oda.te.gov.ua/main/ua/7181.htm">http://www.oda.te.gov.ua/main/ua/7181.htm</a>



Business/Invest information	Description	Links
	world leaders in dairy production, as well as a supplier of raw materials for its production and ingredients for the pharmaceutical industry). The proposal is provided by the Department of trade and economic cooperation of the Ministry of Economic Development and Trade of Ukraine.	<a href="http://www.oda.te.gov.ua/data/upload/publication/main/ua/26830/spivrobotni2016.pdf">http://www.oda.te.gov.ua/data/upload/publication/main/ua/26830/spivrobotni2016.pdf</a>
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 Kiev.	<a href="http://www.oda.te.gov.ua/main/ua/publication/content/7108.htm">http://www.oda.te.gov.ua/main/ua/publication/content/7108.htm</a>
International programs, project and grants	List of international programs, funds and other useful links for attracting grants.	<a href="http://www.oda.te.gov.ua/main/ua/publication/content/7108.htm">http://www.oda.te.gov.ua/main/ua/publication/content/7108.htm</a> <a href="http://www.oda.te.gov.ua/main/ua/publication/content/48189.htm">http://www.oda.te.gov.ua/main/ua/publication/content/48189.htm</a>
Business support	Regional Center for Business Support with assistance of Poland. The main task of the Center is to provide free information and consultation support to SME and individuals who are aiming to launch their own business. The Regional Center for Business Support was opened by the Ministry of Development of the Republic of Poland within the framework of project "Increasing the Investment Attractiveness of Ukraine and Competitiveness of the Regions" within the framework of the of Economic Development and Trade Department of Ternopil Regional State Administration. Hot line: +380352 25-25-85.	<a href="http://www.oda.te.gov.ua/main/ua/publication/content/26830.htm">http://www.oda.te.gov.ua/main/ua/publication/content/26830.htm</a> <a href="https://www.unian.ua/ternopil/2267904-u-ternopoli-za-spriyannya-polschi-vidkrili-regionalniy-tsentr-pidtrimki-pidpriemnitstva.html">https://www.unian.ua/ternopil/2267904-u-ternopoli-za-spriyannya-polschi-vidkrili-regionalniy-tsentr-pidtrimki-pidpriemnitstva.html</a> <a href="http://tcci.te.ua/tcci/ua/ternopil-region/ternopilskaoblast/50-palata/961-tsentr-pidtrymky-pidpryemnytstva">http://tcci.te.ua/tcci/ua/ternopil-region/ternopilskaoblast/50-palata/961-tsentr-pidtrymky-pidpryemnytstva</a>
International trade fairs	A list of International trade fairs and business forums in 2018.	<a href="http://rei.mfa.gov.ua/ua/foreign-business/foreign-events">http://rei.mfa.gov.ua/ua/foreign-business/foreign-events</a> <a href="http://www.oda.te.gov.ua/main/ua/publication/content/26830.htm">http://www.oda.te.gov.ua/main/ua/publication/content/26830.htm</a>
USAID Program	USAID Program "Leadership in Economic Governance". Ternopil region was selected as a pilot for implementation of the Leadership in Economic Governance Program, which is being implemented	<a href="http://economy-te.gov.ua/programa-usaid-liderstvo-v-ekonomichnomu-vryaduvanni-lev/">http://economy-te.gov.ua/programa-usaid-liderstvo-v-ekonomichnomu-vryaduvanni-lev/</a>

Business/Invest information	Description	Links
	with the support of the United States Agency for International Development (USAID).	
Business Community Club	Business Community Club is the Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep their own business word.	<a href="https://bc-club.org.ua/">https://bc-club.org.ua/</a> <a href="https://www.facebook.com/bc.club.vternopoli/">https://www.facebook.com/bc.club.vternopoli/</a>
Business School	Ternopil Business School	<a href="http://tbs.tneu.edu.ua/">http://tbs.tneu.edu.ua/</a>

### Chernivtsi region

Concerning access to business and invest information in Chernivtsi region – there is not enough available information in open sources.

Invest and business information on the Chernivtsi Regional State Administration website:

- Investment proposals;
- Export proposals;
- Information about premium international exhibition and fair activities and business forums.

Department of Economic Development does not function due to reorganization and staff reduction (the representatives of the Chernivtsi Regional State Administration explained that the Department of Economic Development was not closed but disbanded for more efficient work).

**Table 1.27. Access of the business to business / invest information in Chernivtsi region**

Business / Invest information	Description	Links
Invest information	Investment proposals	<a href="http://www.bukoda.gov.ua/page/investitsiina-diyalnist">http://www.bukoda.gov.ua/page/investitsiina-diyalnist</a>
	Investment information for partners	<a href="http://www.bukoda.gov.ua/page/investors-partners">http://www.bukoda.gov.ua/page/investors-partners</a>
	Investment information for Khotynsky region	<a href="http://khotyn.bukoda.gov.ua/news/investitsii">http://khotyn.bukoda.gov.ua/news/investitsii</a>

	Investments in Chernivtsi	<a href="http://invest.city.cv.ua">http://invest.city.cv.ua</a>
	Projects and investments	<a href="http://oblrada.cv.ua/news/theme/68">http://oblrada.cv.ua/news/theme/68</a>
Commercial proposals	Export proposals	<a href="http://www.bukoda.gov.ua/page/komertsii-propozitsii">http://www.bukoda.gov.ua/page/komertsii-propozitsii</a>
B2B opportunities	The Norwegian-Ukrainian Chamber of Commerce (NUCC) invites Ukrainian companies for B2B meetings with Norwegian startups.	<a href="http://bukoda.gov.ua/investnews/biznes-mozhливosti-dlya-it-kompanii-zaproshuemona-b2b-zustrichi-z-norvezkimi-startapami">http://bukoda.gov.ua/investnews/biznes-mozhливosti-dlya-it-kompanii-zaproshuemona-b2b-zustrichi-z-norvezkimi-startapami</a>
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 Kiev.	<a href="http://www.eu4business.eu/uk/project/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini">http://www.eu4business.eu/uk/project/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini</a>
Business events	Information about premium international exhibition and fair activities and business forums.	<a href="http://bukoda.gov.ua/page/prestizhni-mizhnarodni-vistavkovo-yarmarkovi-zakhodi-ta-dilovi-forumi">http://bukoda.gov.ua/page/prestizhni-mizhnarodni-vistavkovo-yarmarkovi-zakhodi-ta-dilovi-forumi</a>
Business Forum	Business Forum "Ukraine – the country of entrepreneurs" was held in 2016. The program includes a panel discussion "Prospects for Small Business Development in Ukraine: State Programs and Initiatives Support" as well as "Business in Ukraine: The Way to Success", which involves the presentation of local entrepreneurs willing to share their successful experiences.	<a href="https://www.unian.ua/business/1667796-uchernivtsyah-prohodit-regionalniy-biznes-forum-ukrajina-krajina-pidpriemstv.html">https://www.unian.ua/business/1667796-uchernivtsyah-prohodit-regionalniy-biznes-forum-ukrajina-krajina-pidpriemstv.html</a>
Agro Workshop	On August 22, 2017, Syngenta Company held one of its traditional summer workshops - "Gardening Workshop" based on the Dnister Gardens farm located in Chernivtsi region (Selyshche village, Sokyryany district). Over one hundred gardeners from Bukovyna and other regions of Ukraine visited the seminar, which took place on the territory of modern high-tech garden.	<a href="http://www.agrotimes.net/foto/album/seminar-majsternya-sadivnictva--chernivecka-obl--serpen-2017-roku">http://www.agrotimes.net/foto/album/seminar-majsternya-sadivnictva--chernivecka-obl--serpen-2017-roku</a>

**Zakarpattia region**

The information about investment and business opportunities in Zakarpattia region is not enough available.

There is no information about international programs and grants, support funds of SME and others.

Investment and business information is available only on Zakarpattia State Administration website - Investment projects and proposals in the region.

In July 2018 there was a grand opening of the Entrepreneurship Support Centre in Uzhgorod which is operating under the Department of economic development and trade of the Zakarpattia Regional State Administration.

Two large-scale business forums take place in the region:

- Business forum “Opportunities for financing foreign investments and unused opportunities for market access” that opens up new opportunities in Zakarpattia region. Organizers are LLC “Hungarian National Trade House” in cooperation with the Hungarian-Ukrainian agro-industrial chamber.
- Business forum “Zakarpattia – business in the centre of Europe” – Zakarpattia economic landscape, opportunities and proposals of regional business, acting and planned investment projects and programs, and projects aimed at the development of small and medium business. There were around 150 participants in the Forum – representatives of business, also from the neighboring regions and countries, chambers of commerce and industry, NGOs, scientific institutions, heads of enterprises, and diplomats of foreign countries.

The table below illustrates the access to business and invest information in the region.

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

<b>Business/Invest information</b>	<b>Description</b>	<b>Links</b>
Investment information	Priority investment projects that will be realized in Zakarpattia region in 2018.	<a href="https://carpathia.gov.ua/storinka/investyciy/ni-obyekty">https://carpathia.gov.ua/storinka/investyciy/ni-obyekty</a>
	Information about investment and foreign-economic activity of Mukachevo district.	<a href="http://mukrayon.gov.ua/main/133.htm">http://mukrayon.gov.ua/main/133.htm</a>
Investment information	Information about investment	<a href="https://carpathia.gov.ua/storinka/investyciy">https://carpathia.gov.ua/storinka/investyciy</a>

Business/Invest information	Description	Links
	cooperation and volumes of investments into Zakarpattia region in 2018.	<a href="#">na-diyalnist</a>
Foreign economic activity	Information about foreign economic activity of the region.	<a href="https://carpathia.gov.ua/storinka/zovnishno-ekonomichna-diyalnist">https://carpathia.gov.ua/storinka/zovnishno-ekonomichna-diyalnist</a>
Regional Development program	Programs of social-economic development of Zakarpattia region until 2020.	<a href="https://carpathia.gov.ua/storinka/regionalni-programy-rozvytku">https://carpathia.gov.ua/storinka/regionalni-programy-rozvytku</a>
Financial and credit security	Information on the financial security of the agrarian sector of Zakarpattia region in 2017.	<a href="https://carpathia.gov.ua/storinka/finansovo-kredytne-zabezpechennya">https://carpathia.gov.ua/storinka/finansovo-kredytne-zabezpechennya</a>
Economy and Business	List of investment project for Berehivskyi district.	<a href="http://bereg-rda.gov.ua/ekonomika-ta-biznes/">http://bereg-rda.gov.ua/ekonomika-ta-biznes/</a>
SME support program	Program of small and medium entrepreneurship development in the region in 2017-2018.	<a href="http://www.vberez.gov.ua/ua/publication/content/2025.htm">http://www.vberez.gov.ua/ua/publication/content/2025.htm</a>
Investment proposals	Investment proposal for Velykoberezhnyanchyna district.	<a href="http://www.vberez.gov.ua/ua/publication/content/830.htm">http://www.vberez.gov.ua/ua/publication/content/830.htm</a>
	Investment proposals for Uzhgorod district.	<a href="http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=7437&amp;Itemid=680">http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=7437&amp;Itemid=680</a>
	List of Investment proposals of Svalyava district	<a href="http://www.svalyava-vlada.gov.ua/ukr/page.php?type=list&amp;id=6">http://www.svalyava-vlada.gov.ua/ukr/page.php?type=list&amp;id=6</a>
	Investment proposals for Vynogradiv district.	<a href="http://www.vynogradiv-rda.gov.ua/index.php/Programi-sotsialno-ekonomichnogo-rozvitku-rayonu/Investitsiyi-propozitsiyi">http://www.vynogradiv-rda.gov.ua/index.php/Programi-sotsialno-ekonomichnogo-rozvitku-rayonu/Investitsiyi-propozitsiyi</a>
	Investment activity of Irshavsk district.	<a href="http://www.irda.gov.ua/2008-09-16-10-24-38.html">http://www.irda.gov.ua/2008-09-16-10-24-38.html</a> <a href="http://www.irda.gov.ua/2008-09-16-10-24-38/2008-09-15-13-33-38.html">http://www.irda.gov.ua/2008-09-16-10-24-38/2008-09-15-13-33-38.html</a>
	Investment proposals for Perechyn district.	<a href="http://perechynrda.gov.ua/info/28/index.html">http://perechynrda.gov.ua/info/28/index.html</a>
	Investment proposals for Mukachevo district.	<a href="http://mukrayon.gov.ua/main/312.htm">http://mukrayon.gov.ua/main/312.htm</a>
Investment proposals	List of investment projects for Zakarpattia region.	<a href="https://www.tpp.uzhgorod.ua/ukr/customers.php?action=invest">https://www.tpp.uzhgorod.ua/ukr/customers.php?action=invest</a>

Business/Invest information	Description	Links
Business incubators	The first University business incubator. The mission is to build up a powerful ecosystem for the development of youth entrepreneurship in Ukraine.	<a href="http://mediacenter.uzhnu.edu.ua/news/tetyana-buturlakina-pro-pershyj-universytetskyj-biznes-inkubator-i-perspektyvy-molodizhnogo-pidpryemnytskogo-partnerstva-yepv-uzhnu/2018-01-04-16974">http://mediacenter.uzhnu.edu.ua/news/tetyana-buturlakina-pro-pershyj-universytetskyj-biznes-inkubator-i-perspektyvy-molodizhnogo-pidpryemnytskogo-partnerstva-yepv-uzhnu/2018-01-04-16974</a>
	Uzhgorod business incubator.	<a href="https://opendatabot.com/c/31826222">https://opendatabot.com/c/31826222</a>
	A business incubator was opened in Ukraine which helps to become an entrepreneur “from scratch”. Small business will be growing within the framework of the national program “Country of entrepreneurship”. And a training of a new generation is done by the experienced business trainers, mentors and bankers.	<a href="https://zakarpattia.net.ua/News/161154-V-Ukraini-vidkryly-biznes-inkubator-za-dopomohoiu-iakoho-mozhna-staty-pidpryiemtsemz-nulia">https://zakarpattia.net.ua/News/161154-V-Ukraini-vidkryly-biznes-inkubator-za-dopomohoiu-iakoho-mozhna-staty-pidpryiemtsemz-nulia</a>
	Enterprise “Uzhgorod business incubator”	<a href="https://maps.visicom.ua/c/22.27516,48.60496.17/f/POI18KMKOQR?lang=ru">https://maps.visicom.ua/c/22.27516,48.60496.17/f/POI18KMKOQR?lang=ru</a>
	TES Business Incubator – Coworking. A place for a team work and a conference centre in Uzhgorod.	<a href="https://ru.foursquare.com/v/%D1%82%D0%B5%D1%81-%D0%B1%D1%96%D0%B7%D0%BD%D0%B5%D1%81%D1%96%D0%BD%D0%BA%D1%83%D0%B1%D0%B0%D1%82%D0%BE%D1%80--tes-business-incubator/4f991014e4b086217139b6f5">https://ru.foursquare.com/v/%D1%82%D0%B5%D1%81-%D0%B1%D1%96%D0%B7%D0%BD%D0%B5%D1%81%D1%96%D0%BD%D0%BA%D1%83%D0%B1%D0%B0%D1%82%D0%BE%D1%80--tes-business-incubator/4f991014e4b086217139b6f5</a>
Enterprise of Zakarpattia Fund of entrepreneurship support “TES-Fund” “Business incubator”	Business incubator in Uzhgorod.	<a href="https://www.ua-region.com.ua/31826222">https://www.ua-region.com.ua/31826222</a>
SME Support Center	There was a grand opening of the Entrepreneurship Support Centre in Uzhgorod. It will be operating under the Department of economic development and trade of Zakarpattia Regional State Administration.	<a href="https://transkarpatia.net/transcarpathia/hot-news/99619-centr-pdtrimki-pdpriyemnictva-zyavivsyia-v-uzhgorod.html">https://transkarpatia.net/transcarpathia/hot-news/99619-centr-pdtrimki-pdpriyemnictva-zyavivsyia-v-uzhgorod.html</a>

Business/Invest information	Description	Links
Business Forum	Large-scale investment forum “Zakarpattia – business in the centre of Europe”.	<a href="http://transkarpatia.net/transcarpathia/economic/88481-v-uzhgorod-rozpochavsya-masshtabniy-nvesticyiniy-forum-zakarpattya-bznes-v-centr-yevropi-foto.html">http://transkarpatia.net/transcarpathia/economic/88481-v-uzhgorod-rozpochavsya-masshtabniy-nvesticyiniy-forum-zakarpattya-bznes-v-centr-yevropi-foto.html</a>
Invest Business Forum	On November 18, 2017, in Uzhgorod there was the business forum “Opportunities for financing foreign investments and unused opportunities for market access”.	<a href="http://prozahid.com/content-52028.html">http://prozahid.com/content-52028.html</a>
American program of business internships “Regional economic development”	The Council of Heads of the State Administrations in cooperation with the American Commercial Service of the United States Embassy in Ukraine and the SABIT Program, sponsored by the US Department of Commerce, informs about the opening of a new business internship program for experts from Ukraine in the "Regional Economic Development" direction.	<a href="http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=12177:pro-amerikansku-programu-biznes-stazhuvannya-regionalnij-ekonomichnij-rozvitok&amp;catid=63:ogoloshennya&amp;Itemid=665">http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=12177:pro-amerikansku-programu-biznes-stazhuvannya-regionalnij-ekonomichnij-rozvitok&amp;catid=63:ogoloshennya&amp;Itemid=665</a>

### **Lviv Region**

The business and invest information in Lviv region is available, open and sufficient.

The following invest information is presented on the Lviv RSA website:

- Investment information about all districts of Lviv region;
- Incentive provisions of Ukrainian legislative acts that investors can use for project implementation;
- Centers of entrepreneurship support in Lviv Chamber of Commerce and Industry

There is also a Centre for startup and entrepreneurship support in Lviv region – iHUB Lviv. Main purpose of the Centre is assistance in creation of product companies that will implement projects from idea to business.

State enterprise “Centre for business support – NewBiznet” is created under aegis of the USAID. There also operates the business incubator created by PrivatBank.

Business Community Club is also active in the region – it is Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep up to their business word.

In general, there is a lot of support for investments and SME in Lviv region. Access to this information is provided through many links, in particular on the Lviv RSA website.

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

Business/Invest information	Description	Links
Department of investments attraction	Information about investment objects in Lviv region. Proposals of land lots of “greenfield” type in order to create industrial parks and areas in Lviv region. Objects of unfinished construction that can be involved in production premises. Investment passport of Lviv Region.	<a href="http://loda.gov.ua/zaluchennya_investyicyi">http://loda.gov.ua/zaluchennya_investyicyi</a>
Support of investment projects	Provisions on “Investor Service”. Presentation of the Department of investment policy. Investment booklet.	<a href="http://loda.gov.ua/upload/users_files/22/upload/InvestYciynY%20buklet.pdf">http://loda.gov.ua/upload/users_files/22/upload/InvestYciynY%20buklet.pdf</a> <a href="http://loda.gov.ua/suprovid_investyicyynyh_proektiv">http://loda.gov.ua/suprovid_investyicyynyh_proektiv</a>
Development of trade and entrepreneurship	Information about state support of Ukrainian export and entrepreneurship.	<a href="http://loda.gov.ua/rozvytok_torhivli">http://loda.gov.ua/rozvytok_torhivli</a>
Program for Competitiveness Improvement	Organization and holding of forums, conferences and topical meetings, support of small business.	<a href="https://public.tableau.com/views/Competitiveness/Dashboard1?:embed=y&amp;:display_count=yes&amp;publish=yes&amp;:showVizHome=no">https://public.tableau.com/views/Competitiveness/Dashboard1?:embed=y&amp;:display_count=yes&amp;publish=yes&amp;:showVizHome=no</a>
Investment information	Plan of activities in 2015-2017 on implementation of the State strategy of regional development for the period up to 2020.	<a href="http://loda.gov.ua/upload/users_files/22/upload/PLAN_ZAHODIV_Z_REALIZATSII_STRATEGII_LVIVSKOI_OBLASTI_u_2017-2018_rokah(1).pdf">http://loda.gov.ua/upload/users_files/22/upload/PLAN_ZAHODIV_Z_REALIZATSII_STRATEGII_LVIVSKOI_OBLASTI_u_2017-2018_rokah(1).pdf</a>
	A list of micro projects of Gorodotsk district. State register of investment projects and project	<a href="http://www.gorodok-vlada.gov.ua/economy">http://www.gorodok-vlada.gov.ua/economy</a>



Business/Invest information	Description	Links
	<p>(investment) proposals.</p> <p>A catalogue of industrial enterprises of the district.</p> <p>Investment business card.</p> <p>Laws about investments.</p>	
	Investment portal of Lviv region provides information on consulting services, investment projects of the region.	<a href="https://www.invest-lvivregion.com/">https://www.invest-lvivregion.com/</a>
	Published Manual “Access to donor and investment resources in the field of regional development”.	<a href="http://drohobych-rda.gov.ua/4/5800-opublikovano-posbnik-dostup-do-donorskih-ta-nvesticynih-resursv-v-galuz-regonalnogo-rozvitku.html">http://drohobych-rda.gov.ua/4/5800-opublikovano-posbnik-dostup-do-donorskih-ta-nvesticynih-resursv-v-galuz-regonalnogo-rozvitku.html</a> <a href="http://dfrr.minregion.gov.ua/foto/upload/Funding_Guide_UA.pdf">http://dfrr.minregion.gov.ua/foto/upload/Funding_Guide_UA.pdf</a>
	<p>Updated investment proposals of free land lots (Greenfield object) and free production areas (Brownfield object) of Drohobytzky district.</p> <p>Information about Slovenian companies whose projects can be realized in Ukraine within the framework of “Eurobasket-2015”.</p> <p>Investment proposals.</p>	<a href="http://drohobych-rda.gov.ua/4/">http://drohobych-rda.gov.ua/4/</a> <a href="http://drohobych-rda.gov.ua/ekonomka/17483-pdpriyemcv-drogobichchini-zaproschuyut-do-uchast-v-oblasnomu-konkurs-nvesticynih-proektv.html">http://drohobych-rda.gov.ua/ekonomka/17483-pdpriyemcv-drogobichchini-zaproschuyut-do-uchast-v-oblasnomu-konkurs-nvesticynih-proektv.html</a>
Centres for SME support	Centre for business support in the city of Lviv based upon PPV Knowledge Networks	<a href="http://www.eu4business.eu/uk/programme/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini">http://www.eu4business.eu/uk/programme/eu4business-merezha-centriv-pidtrymky-biznesu-v-ukrayini</a>
	State enterprise “Centre for business support – NewBiznet” USAID Ukraine Program “Leadership in economic governance” 2014-2017	<a href="http://lev.org.ua/ua/institutions/centriv-pidtrimki-biznesu--nubiznet-46.html">http://lev.org.ua/ua/institutions/centriv-pidtrimki-biznesu--nubiznet-46.html</a>
	iHUB Lviv – a new centre for entrepreneurship support. Main purpose of the centre is assistance in creation of product companies that will be implementing business projects from idea to business.	<a href="https://city-adm.lviv.ua/news/city/lviv-changes/228256-u-lvovi-z-iavyvsia-novyi-tsentr-pidtrymky-pidpriemnytstva">https://city-adm.lviv.ua/news/city/lviv-changes/228256-u-lvovi-z-iavyvsia-novyi-tsentr-pidtrymky-pidpriemnytstva</a>
Business incubator	Project “Business Incubator”. National program of small business development.	<a href="https://privatbank.ua/news/2018/2/6/biznes-inkubator-u-lvovi-motivuvav-">https://privatbank.ua/news/2018/2/6/biznes-inkubator-u-lvovi-motivuvav-</a>

Business/Invest information	Description	Links
	The “Country of entrepreneurs” initiated by PrivatBank will allow in the nearest years to create more than a million of jobs and raise Ukrainian economy.	<a href="#">pidpriyemciv</a>
Business proposals	Business proposals for commodity producers.	<a href="http://loda.gov.ua/biznes_propozytsij_dlya_silskohospodarskyh_dlya_tov_aro_vyrobnykiv_2">http://loda.gov.ua/biznes_propozytsij_dlya_silskohospodarskyh_dlya_tov_aro_vyrobnykiv_2</a>
Business development Center	Business development center at Lviv CCI	<a href="https://lcci.com.ua/tretejskyj-sud/">https://lcci.com.ua/tretejskyj-sud/</a>
Export Support Center	Export Support Center at Lviv CCI	<a href="https://lcci.com.ua/centr-pidtrymky-eksportu/">https://lcci.com.ua/centr-pidtrymky-eksportu/</a>
Women’s Business development Committee	Women’s Business Development Committee at Lviv CCI	<a href="https://lcci.com.ua/pro-komitet-z-rozvytku-zhinochogo-pidpryyemnyctva/">https://lcci.com.ua/pro-komitet-z-rozvytku-zhinochogo-pidpryyemnyctva/</a>
Investment proposals	Investment projects of Mostyskiy district	<a href="http://mostyska.loda.gov.ua/ekonomika-2/investitsiy-na-diyalnist/">http://mostyska.loda.gov.ua/ekonomika-2/investitsiy-na-diyalnist/</a>
	Investment proposals of Pustomytiv district	<a href="http://www.pustomyty.gov.ua/investments/investment-proposals">http://www.pustomyty.gov.ua/investments/investment-proposals</a>
	Investment proposals of Radehivsk district	<a href="http://rrda.lviv.ua/nvesticyn-propoziciji.html">http://rrda.lviv.ua/nvesticyn-propoziciji.html</a>
	Information about availability of land lots and other investment projects in Sokolivsky district	<a href="https://skole-rda.gov.ua/investicijni-propoziciji-14-20-10-16-01-2017/">https://skole-rda.gov.ua/investicijni-propoziciji-14-20-10-16-01-2017/</a>
	Information about availability of land lots and other investment projects in Stryisky district	<a href="http://stryi-rda.gov.ua/index.php/investytsiina-diyalnist">http://stryi-rda.gov.ua/index.php/investytsiina-diyalnist</a>
	Information about international financial help, investment proposals and investment passport in Turkivsky district	<a href="http://turka-rda.gov.ua/turkivschyna-investytsijna">http://turka-rda.gov.ua/turkivschyna-investytsijna</a>
	Investment proposal to grow berries, in particular strawberries, in Drohomysl village, Yavorivsky district. Investment proposal to produce ecological fuel based on wood shavings, Shklo village of Yavorivsky district. Investment project of raspberries growth in Smolyn village of Yavorivsky district.	<a href="http://loda.gov.ua/agr_investytsijna_diyalnist">http://loda.gov.ua/agr_investytsijna_diyalnist</a>

Business/Invest information	Description	Links
	Department of agro-industrial development. Catalogues of investment proposals for agricultural land lots. Catalogue of free agricultural land lots. Catalogue of land lots of agricultural purpose offered for selling lease rights during land trades	<a href="http://loda.gov.ua/katalogy_investychnyh_propozyciy_zemel_nyh_dilyanok_sil_s_kogospodars_kogo_pryznachennya">http://loda.gov.ua/katalogy_investychnyh_propozyciy_zemel_nyh_dilyanok_sil_s_kogospodars_kogo_pryznachennya</a>
Business development and support	Business development and support of Samborsk district	<a href="http://www.sambirrada.gov.ua/index.php?option=com_content&amp;view=featured&amp;Itemid=62">http://www.sambirrada.gov.ua/index.php?option=com_content&amp;view=featured&amp;Itemid=62</a>
Business Community Club	Business Community Club is Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep up to their business word.	<a href="https://bc-club.org.ua/bc-club/contacts.html">https://bc-club.org.ua/bc-club/contacts.html</a>

### Volyn region

The business and invest information in Volyn region is available and open.

Good access to the following invest information is presented in the Volyn RSA website:

- Investment information about all districts of Volyn region;
- Incentive provisions of Ukrainian legislative acts that investors can use for project implementation;
- Information about international financial and donor organizations

There is also Volyn Business incubator - the project is being implemented by the Volyn Regional Fund for Enterprise Support in partnership with the Lublin Development Fund - Local Development Agency in the city of Khmel, Lutsk City Council, Volyn Regional Council and Volyn Oblast Youth Center of Labor. The main goal of the project is to support and expand cooperation between Volyn and Lyubel region in the area of providing consulting, education and other services for small and medium enterprises.

In general, there is a lot of support for investments and SME in Volyn region. The access to this information is available but information is presented in a quite small volume. The new team of RSA is very active in attracting investors and developing a favorable business climate in the region.

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

Business/Invest information	Description	Links
Investment information	List of unfinished construction objects in Volodymyr-Volynsk district	<a href="http://www.vvadm.gov.ua/investytsiinyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva">http://www.vvadm.gov.ua/investytsiinyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva</a>
	Information about grants for financing innovative solutions and inventions under the “Expo Live” program	<a href="http://www.ivaadm.gov.ua/ekonomika/investytsii/item/9532-pro-nadanniahrantiv-dlia-finansuvannia-innovatsiinykh-rishen-ta-vynakhodivza-prohramoiu-expo-live">http://www.ivaadm.gov.ua/ekonomika/investytsii/item/9532-pro-nadanniahrantiv-dlia-finansuvannia-innovatsiinykh-rishen-ta-vynakhodivza-prohramoiu-expo-live</a>
	List of lands which can be offered for construction of industrial objects, tourist-recreational complexes, objects of trade or other types of economic activity of Volodymyr-Volynsk district	<a href="http://www.vvadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-iakimozhut-butyzaproponovani-dlia-budivnytstva-promyslovykh-ob-iektiv-turystychno-rekreatsiinykh-kompleksiv-ob-iektiv-torhivli-chyinshykh-vydiv-ekonomichnoi-diiialnosti">http://www.vvadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-iakimozhut-butyzaproponovani-dlia-budivnytstva-promyslovykh-ob-iektiv-turystychno-rekreatsiinykh-kompleksiv-ob-iektiv-torhivli-chyinshykh-vydiv-ekonomichnoi-diiialnosti</a>
Investment information	List of enterprises of Kamin-Kashirsky district of all forms of ownership	<a href="http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/perelik-vidkrytykh-aktsionermykh-tovarystv">http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/perelik-vidkrytykh-aktsionermykh-tovarystv</a>
	Questionnaire for free production facilities of Kovel'sky district	<a href="http://www.koveladm.gov.ua/show/page-194/">http://www.koveladm.gov.ua/show/page-194/</a>
	Investment support information of Kovel'sky district	<a href="http://www.koveladm.gov.ua/show/page-196/">http://www.koveladm.gov.ua/show/page-196/</a>
	List of lands and industrial sites that can be offered for construction of industrial facilities, tourist and recreational complexes, objects of trade or other types of economic activity in Lutsk district	<a href="http://www.lutskadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.lutskadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>
	Available production and office space, which can be used by investors for industrial facilities, tourist and recreational complexes, shopping and office centers in Lutsk district	<a href="http://www.lutskadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia">http://www.lutskadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia</a>
	List of unfinished construction objects in	<a href="http://www.lutskadm.gov.ua/investytsi">http://www.lutskadm.gov.ua/investytsi</a>

Business/Invest information	Description	Links
	Lutsk district	<a href="http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva">inyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva</a>
	List of lands and industrial sites that can be offered for the construction of industrial facilities, tourist and recreational complexes, objects of trade or other types of economic activity in Lyubeshivsky district	<a href="http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>
	Available production and office space, which can be used by investors for industrial facilities, tourist and recreational complexes, shopping and office centers in Lyubeshivsky district	<a href="http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia">http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia</a>
	Available production facilities of Lyubomlsky district	<a href="http://www.lbmadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-prymishchennia">http://www.lbmadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-prymishchennia</a>
Investment information	Investment passport of Manevtsky district	<a href="http://www.manadm.gov.ua/ekonomichnyi-rozvytok/korotke-reziume-investytsiinoho-proektu">http://www.manadm.gov.ua/ekonomichnyi-rozvytok/korotke-reziume-investytsiinoho-proektu</a>
	Information on vacant land lots of Ratnivsky district	<a href="http://www.ratadmin.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu">http://www.ratadmin.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu</a>
	Information on vacant premises of Ratnivsky district	<a href="http://www.ratadmin.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.ratadmin.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>
	Investment information about Starovyzhvyskiy district	<a href="http://www.stvadm.gov.ua/index.php/ekonomika/investytsiina-diialnist/251-investytsiini-propozytsii">http://www.stvadm.gov.ua/index.php/ekonomika/investytsiina-diialnist/251-investytsiini-propozytsii</a>
	Investment information about Turiysky district	<a href="http://www.turadm.gov.ua/poriadok-reiestratsii/rozvytok-pidpriemnytstva">http://www.turadm.gov.ua/poriadok-reiestratsii/rozvytok-pidpriemnytstva</a>
Investment proposals	Investment proposals of enterprises of Gorohivskiy district	<a href="http://www.goradm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu">http://www.goradm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu</a>
	List of lands and industrial sites that can be offered for the construction of industrial facilities, tourist and recreational complexes, objects of trade or other types of	<a href="http://www.goradm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.goradm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>

Business/Invest information	Description	Links
	economic activity in Gorohivskiy district	
	Available production and office space, which can be used by investors for industrial facilities, tourist and recreational complexes, shopping and office centers in Gorohivskiy district	<a href="http://www.goradm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia">http://www.goradm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia</a>
	List of unfinished construction objects in Gorohivskiy district	<a href="http://www.goradm.gov.ua/investytsiinyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva">http://www.goradm.gov.ua/investytsiinyi-dovidnyk/perelik-ob-iektiv-nezavershenoho-budivnytstva</a>
	Investment attractive objects of Ivanychivsk district	<a href="http://www.ivaadm.gov.ua/pidpriemnytstvo/investytsiino-pryvablyvi-obieky">http://www.ivaadm.gov.ua/pidpriemnytstvo/investytsiino-pryvablyvi-obieky</a>
	List of lands and industrial sites that can be offered for the construction of industrial facilities, tourist and recreational complexes, objects of trade or other types of economic activity in Kamin-Kashyrsky district	<a href="http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>
Investment proposals	Available production and office space, which can be used by investors for industrial facilities, tourist and recreational complexes, shopping and office centers in Kamin-Kashyrsky district	<a href="http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia">http://www.kamadm.gov.ua/investytsiinyi-dovidnyk/naiavni-vyrobnychi-ofisni-prymishchennia</a>
	Investment projects of Kovel'sky district	<a href="http://www.koveladm.gov.ua/show/page-193/">http://www.koveladm.gov.ua/show/page-193/</a>
	Questionnaire for investment proposal of Kovel'sky district	<a href="http://www.koveladm.gov.ua/show/page-195/">http://www.koveladm.gov.ua/show/page-195/</a>
	Investment proposals of enterprises of Lokachynskiy district	<a href="http://www.locadm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu">http://www.locadm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu</a>
	List of lands and industrial sites that can be offered for construction of industrial facilities, tourist and recreational complexes, objects of trade or other types of economic activity in Lokachynskiy district	<a href="http://www.locadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky">http://www.locadm.gov.ua/investytsiinyi-dovidnyk/zemelni-dilianky-ta-promyslovi-maidanchyky</a>
	Investment proposals of Lyubeshivsky district	<a href="http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu">http://www.lbsadm.gov.ua/investytsiinyi-dovidnyk/investytsiini-propozytsii-pidpriemstv-raionu</a>

Business/Invest information	Description	Links
	Investment proposal of Lyubomlsky district	<a href="http://www.lbmadm.gov.ua/investytsii-nyi-dovidnyk/investytsiini-proekty">http://www.lbmadm.gov.ua/investytsii-nyi-dovidnyk/investytsiini-proekty</a>
	List of unfinished construction objects of Lyubomlsky district	<a href="http://www.lbmadm.gov.ua/investytsii-nyi-dovidnyk/ob-iekty-nezavershenoho-budivnytstva">http://www.lbmadm.gov.ua/investytsii-nyi-dovidnyk/ob-iekty-nezavershenoho-budivnytstva</a>
	Investment offers and a list of investment objects (free land plots and premises) of Manevytsky district	<a href="http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/ankety-zemelnykh-dilianok-iaki-abo-pravo-orendy-iakykh-mozhut-buty-zaproponovani-dlia-prodazhu-na-zemelnykh-auksionakh-dlia-realizatsii-investytsiinykh-proektiv">http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/ankety-zemelnykh-dilianok-iaki-abo-pravo-orendy-iakykh-mozhut-buty-zaproponovani-dlia-prodazhu-na-zemelnykh-auksionakh-dlia-realizatsii-investytsiinykh-proektiv</a>
	Investment offers and a list of investment objects (vacant premises of buildings and structures that can be rented or purchased) of Manevytsky district	<a href="http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/investytsiini-propozytsii-ta-perelik-ob-iektiv-investuvannia-vilnykh-vyrobnych-ykh-prymishchen-budivel-ta-sporud-iaki-mozhna-vziaty-v-orendu-abo-prydbaty">http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/investytsiini-propozytsii-ta-perelik-ob-iektiv-investuvannia-vilnykh-vyrobnych-ykh-prymishchen-budivel-ta-sporud-iaki-mozhna-vziaty-v-orendu-abo-prydbaty</a>
International donor support programs and grants	Information about international donor support programs and grants	<a href="http://www.goradm.gov.ua/investytsiinyi-dovidnyk/tekhnichna-dopomoha">http://www.goradm.gov.ua/investytsiinyi-dovidnyk/tekhnichna-dopomoha</a>
Business Community Club	Business Community Club is Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep up to their business word.	<a href="https://bc-club.org.ua/bc-club/contacts.html">https://bc-club.org.ua/bc-club/contacts.html</a>
Business development programs	Business development programs of Ivanychivsk district	<a href="http://www.ivaadm.gov.ua/pidpriemnytstvo/prohrama-rozvytku-pidpriemnytstva">http://www.ivaadm.gov.ua/pidpriemnytstvo/prohrama-rozvytku-pidpriemnytstva</a>
Information about international financial and donor organizations	Information about international financial and donor organizations of Manevytsky district	<a href="http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/informatsiia-promizhnarodni-finansovi-ta-donorski-orhanizatsii">http://www.manadm.gov.ua/ekonomic-hnyi-rozvytok/informatsiia-promizhnarodni-finansovi-ta-donorski-orhanizatsii</a>
SME support Center	Volyn Regional Fund for Entrepreneurship Support	<a href="http://ufpp.gov.ua/regional_funds/volynskiy_oblasniy">http://ufpp.gov.ua/regional_funds/volynskiy_oblasniy</a>
	Presentation of the Program for financing of small and medium-sized businesses in Lutsk	<a href="https://setech.in.ua/novyny/prezentacij-a-programi-z-pidtrimki-finansuvannja">https://setech.in.ua/novyny/prezentacij-a-programi-z-pidtrimki-finansuvannja</a>

Business/Invest information	Description	Links
		<a href="http://dlja-malogo-i-serednogo-biznesu-u-lucku/">dlja-malogo-i-serednogo-biznesu-u-lucku/</a>
Commercial proposals	Commercial proposals from Volyn CCI	<a href="https://vcci.com.ua/commercial_offers/">https://vcci.com.ua/commercial_offers/</a>
Business incubator	The project is being implemented by the Volyn Regional Fund for Enterprise Support in partnership with the Lublin Development Fund - Local Development Agency in the city of Khmel, Lutsk City Council, Volyn Regional Council and Volyn Oblast Youth Center of Labor	<a href="http://vrbi.at.ua/">http://vrbi.at.ua/</a>

### **Rivne region**

The access to invest and business information in Rivne region is very good and information is fully presented.

On Rivne RSA website the following information is presented:

- International support programs related to small and medium enterprises (SME) in Ukraine;
- Information about investment attraction in agro-industrial complex;
- The most attractive investment proposals in Rivne region.

There was created a Centre for business support as a part of the project “Network of centres for business support” with financial support of the EU and initiative “EU4Business”.

There is an Invest Agency created in Rivne that supports investors – the Agency “Invest in Rivne”, where foreign investors can obtain professional support from specialized organization. The Agency is intended to assist investors and businesses in Rivne region in site selection and settlement, starting business and implementation of all stages of investment project. The Agency was founded by local authorities with support of Organization for Security and Co-operation in Europe (OSCE).

There is also the Regional Development Agency of Rivne region.

More information on the issue is provided in the table below.

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



Business/Invest information	Description	Links
Investment information	Information about investment attraction in agro-industrial complex, the investment passport of Rivne region.	<a href="http://agroprom-rivne.gov.ua/bokove/investicijna-diyalnist/">http://agroprom-rivne.gov.ua/bokove/investicijna-diyalnist/</a>
	Information about investment support from the government.	<a href="http://www.rv.gov.ua/sitenew/main/ua/3260.htm">http://www.rv.gov.ua/sitenew/main/ua/3260.htm</a>
	Investment projects implemented in Rivne region.	<a href="http://www.rv.gov.ua/sitenew/main/ua/4770.htm">http://www.rv.gov.ua/sitenew/main/ua/4770.htm</a>
	Investment potential of the region.	<a href="http://www.rv.gov.ua/sitenew/main/ua/14055.htm">http://www.rv.gov.ua/sitenew/main/ua/14055.htm</a>
	Information about industrial potential of the region.	<a href="http://www.rv.gov.ua/sitenew/main/ua/249.htm">http://www.rv.gov.ua/sitenew/main/ua/249.htm</a>
	Investment proposals for Zarichnenskyi district.	<a href="http://zarrda.gov.ua/?page_id=104">http://zarrda.gov.ua/?page_id=104</a>
	Investment information for Rivne region.	<a href="http://www.rv.gov.ua/sitenew/rivne/ua/5853.htm">http://www.rv.gov.ua/sitenew/rivne/ua/5853.htm</a>
	Investment information of Sarny district.	<a href="http://sarny-rda.gov.ua/node/126282">http://sarny-rda.gov.ua/node/126282</a>
Investment proposals	Investment proposals of all districts in Rivne region.	<a href="http://www.rv.gov.ua/sitenew/main/ua/4432.htm">http://www.rv.gov.ua/sitenew/main/ua/4432.htm</a>
	List of land lots to be auctioned in the territory of Mlynivskyi district.	<a href="http://www.rv.gov.ua/sitenew/mlynivsk/ua/23256.htm">http://www.rv.gov.ua/sitenew/mlynivsk/ua/23256.htm</a>
	Investment proposals of Rokytnivsk district.	<a href="http://www.rv.gov.ua/sitenew/rokytnivsk/ua/23320.htm">http://www.rv.gov.ua/sitenew/rokytnivsk/ua/23320.htm</a>
	Investments proposals of Bereznivskyi district.	<a href="http://brrda.gov.ua/investoram/">http://brrda.gov.ua/investoram/</a>
	Investment proposals of Goschansk district.	<a href="http://www.rv.gov.ua/sitenew/goschansk/ua/13189.htm">http://www.rv.gov.ua/sitenew/goschansk/ua/13189.htm</a>
	Investment proposals of Demydivsk district.	<a href="http://www.rv.gov.ua/sitenew/demydivsk/ua/16560.htm">http://www.rv.gov.ua/sitenew/demydivsk/ua/16560.htm</a>
Invest Agency	Agency “Invest in Rivne” - support of investors.	<a href="http://www.rv.gov.ua/sitenew/main/ua/3054.htm">http://www.rv.gov.ua/sitenew/main/ua/3054.htm</a> <a href="http://investinrivne.org">http://investinrivne.org</a>
Support information for foreign economic activity	Support information for exporters and importers. Online platform for searching foreign partners. Export strategy of Ukraine – infographics. Export of agricultural products to the EU.	<a href="http://www.rv.gov.ua/sitenew/main/ua/25653.htm">http://www.rv.gov.ua/sitenew/main/ua/25653.htm</a>
Network of SME support centers	Network of SME support centers in Rivne from EBRD.	<a href="http://www.eu4business.eu/uk/programme/eu4business-merezha-">http://www.eu4business.eu/uk/programme/eu4business-merezha-</a>

		<a href="#">centriv-pidtrymky-biznesu-v-ukrayini</a>
International programs, project and grants	List of international programs, funds and other useful links for attracting grants.	<a href="http://www.rv.gov.ua/sitenew/main/ua/25428.htm">http://www.rv.gov.ua/sitenew/main/ua/25428.htm</a>
Donor programs and grants.	Catalogue of donor programs and grants in Dubensk district.	<a href="http://www.kp.org.ua/wp-content/uploads/2016/12/%D0%93%D1%80%D0%B0%D0%BD%D1%82%D0%B8-2017.pdf">http://www.kp.org.ua/wp-content/uploads/2016/12/%D0%93%D1%80%D0%B0%D0%BD%D1%82%D0%B8-2017.pdf</a>
Business incubator	First steps of the project implementation will already start in July. Rivne RSA within a month should offer a choice of several administrative units where the project will be actually implemented – city, district centre or united area community.	<a href="http://lgdc.org.ua/branch/16/biznes-inkubator-dlya-gromad-zaproponuvaly-stvoryty-na-rivnenshchyni">http://lgdc.org.ua/branch/16/biznes-inkubator-dlya-gromad-zaproponuvaly-stvoryty-na-rivnenshchyni</a>
	Business incubator in Rivne	<a href="https://rivne-city.com/ua/fullinfo/34486">https://rivne-city.com/ua/fullinfo/34486</a>
Business Support Center	Rivne CCI provides support for SME.	<a href="http://www.rcci.rivne.com/?pg=service&amp;lng=ua">http://www.rcci.rivne.com/?pg=service&amp;lng=ua</a>
	The Center for Business Promotion was created within the framework of the project "Development of Small and Medium Business in the Cities of Rivne and Lublin"	<a href="https://infomisto.com/uk/rivne/catalog/trening-centry/centr-spryyannya-biznesu">https://infomisto.com/uk/rivne/catalog/trening-centry/centr-spryyannya-biznesu</a>
Business Community Club Rivne	Business Community Club is Ukrainian Business Club for executives and small business owners having a reliable business reputation and who keep up to their business word.	<a href="https://bc-club.org.ua/bc-club/contacts.html">https://bc-club.org.ua/bc-club/contacts.html</a>

## 1.8. Sector associations, cooperatives, business support organizations

### Cooperatives

As of April 1, 2018, there were 285 agricultural cooperatives in 7 Western Ukrainian regions, whose activities are related to the investigated agricultural production sectors (vegetable growing, horticulture, milk production and processing) (Table 1.32). 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 1.32. Registered agricultural cooperatives in Western Ukrainian regions as of 01.04.2018**

Region	The main activity	Number
Chernivtsi	01.61 Support activities for crop production	12
	01.62 Support activities for animal production	3
	01.41 Raising of dairy cattle	3
	01.24 Growing of pome fruits and stone fruits	2
	15.51.0 Operation of dairies and cheese making	1
	01.21.0 Raising of dairy cattle	1
	01.13 Growing of vegetables and melons, roots and tubers	1
	01.25 Growing of other tree and bush fruits and nuts	1
	01.50 Mixed farming	1
<b>Total Chernivtsi:</b>		<b>25</b>
Ivano-Frankivsk	01.61 Support activities for crop production	17
	01.50 Mixed farming	7
	01.13 Growing of vegetables and melons, roots and tubers	5
	01.41 Raising of dairy cattle	5
	01.62 Support activities for animal production	2
	01.25 Growing of other tree and bush fruits and nuts	2
	01.64 Seed processing for propagation	1
	01.12.0 Growing of vegetables, horticultural specialities and nursery products	1

Region	The main activity	Number
<b>Total Ivano-Frankivsk:</b>		<b>40</b>
<b>Ternopil</b>	01.61 Support activities for crop production	16
	10.51 Operation of dairies and cheese making	7
	01.25 Growing of other tree and bush fruits and nuts	6
	01.62 Support activities for animal production	3
	01.50 Mixed farming	3
	01.13 Growing of vegetables and melons, roots and tubers	2
	01.12.0 Growing of vegetables, horticultural specialities and nursery products	2
	01.24 Growing of pome fruits and stone fruits	2
	01.30.0 Mixed farming	2
	01.41 Raising of dairy cattle	1
<b>Total Ternopil:</b>		<b>44</b>
<b>Volyn</b>	01.61 Support activities for crop production	18
	01.41 Raising of dairy cattle	9
	01.25 Growing of other tree and bush fruits and nuts	3
	01.30.0 Mixed farming	2
	01.21.0 Raising of dairy cattle	1
	10.51 Operation of dairies and cheese making	1
	01.13 Growing of vegetables and melons, roots and tubers	1
<b>Total Volyn</b>		<b>35</b>
<b>Zakarpattia</b>	01.50 Mixed farming	3
	01.61 Support activities for crop production	3
	10.51 Operation of dairies and cheese making	2
	01.21.0 Raising of dairy cattle	1
	01.13 Growing of vegetables and melons, roots and tubers	1
	01.41 Raising of dairy cattle	1
<b>Total Zakarpattia</b>		<b>11</b>
<b>Lviv</b>	01.25 Growing of other tree and bush fruits and nuts	30
	01.61 Support activities for crop production	17
	01.13 Growing of vegetables and melons, roots and tubers	14
	01.50 Mixed farming	9
	10.51 Operation of dairies and cheese making	6
	01.62 Support activities for animal production	5
	01.41 Raising of dairy cattle	5
	10.39 Other processed and preserved fruit and vegetables	1
	01.30.0 Mixed farming	1
	01.24 Growing of pome fruits and stone fruits	1
	01.12.0 Growing of vegetables, horticultural specialities and nursery products	1
	10.31 Processed and preserved potatoes	1
<b>Total Lviv</b>		<b>91</b>
<b>Rivne</b>	01.61 Support activities for crop production	14
	01.41 Raising of dairy cattle	12
	01.62 Support activities for animal production	4
	01.13 Growing of vegetables and melons, roots and tubers	3

Region	The main activity	Number
	10.51 Operation of dairies and cheese making	2
	01.24 Growing of pome fruits and stone fruits	2
	01.21.0 Raising of dairy cattle	1
	01.25 Growing of other tree and bush fruits and nuts	1
<b>Total Rivne</b>		<b>39</b>
<b>TOTAL</b>		<b>285</b>

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

**Sector NGOs (associations, business support organizations)**

In order to define the number of officially registered and active non-governmental organizations within the researched sectors there was conducted an interview survey by making phone calls to all found registered organizations in Ivano-Frankivsk, Ternopil and Chernivtsi regions. All information about registered organizations was taken from the website <http://rgo.informjust.ua/>

**Number of officially registered sectoral non-governmental organizations (NGOs):**

Ivano-Frankivsk region – 81

Ternopil region – 57

Lviv region – 56

Zakarpattia region – 59

Rivne region – 38

Volyn region – 34

Chernivtsi region – 23

**Number of active NGOs confirmed by phone calls:**

Ivano-Frankivsk region – 40

Ternopil region – 12

Lviv region – 17

Zakarpattia region – 11

Rivne region – 12

Volyn region – 8

Chernivtsi region – 6

Number of active NGOs according to the State Register of Legal entities:

Ivano-Frankivsk region – 36

Ternopil region – 24

Lviv region – 50

Zakarpattia region – 39

Rivne region – 27

Volyn region – 26

Chernivtsi region – 10

There are 348 registered non-governmental organizations in surveyed seven regions of Ukraine, only about one third (106 organizations) are active.

The list and results of the interviewed NGOs is presented in the Annexes 3-5, 7-10.

## 1.9. Overview of sector events in the regions

### Ivano-Frankivsk region

With regard to the sector events the Ivano-Frankivsk region is quite active. The most important and biggest events under consideration are the following ones:

- Forum “Business Trends 2018”. The purpose of the Forum is to share the best practices of the best experts and practitioners in the field of strategic management and promotion of internet business.
- "Ecogeoforum-2018: modern youth for clean environment" was held in April 2018.
- II International Forum of partner cities (2017). The main purpose of the Forum is to demonstrate the economic and investment potential of Ivano-Frankivsk, to intensify cooperation of business circles in the production of goods and services, and to present actual infrastructure projects of the city.
- Business Forum “The Country of Entrepreneurs” (2016). The Ukrainian Union of Industrialists and Entrepreneurs, with support of bankers and local authorities, seeks to show to the working entrepreneurs and those who want to open their own business, real opportunities and prospects for their ideas, inspire business initiatives and demonstrate practical tools for creation or development of business. The program included a panel discussion "Prospects for Small Business Development in Ukraine: State Programs and Initiatives Support" as well as "Business in Ukraine: The Way to Success", which involves a presentation of local entrepreneurs willing to share their successful experiences.

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

**Table 1.33. Overview of sector events in Ivano-Frankivsk region**

Event	Description	Links
Business Community Club of Ivano-Frankivsk	Business Community Club operates in interests of small businesses of Ukraine and has an aim of country development through the impact on social and economic processes in Ukraine. The club organizes business events.	<a href="https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLw_Y_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf">https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLw_Y_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf</a>
Business Forum	Forum “Business Trends 2018”. A purpose of the forum is to share the best practices of the best experts, practitioners in the field of strategic management and promotion of business on the	<a href="https://www.youtube.com/watch?v=jL1I_zqjB4s">https://www.youtube.com/watch?v=jL1I_zqjB4s</a>

	Internet.	
	Business Forum “The Country of Entrepreneurs”	<a href="https://www.facebook.com/events/1239629916132058/">https://www.facebook.com/events/1239629916132058/</a> <a href="http://ukrrp.org/eu4business-week-forum-donoriv-u-sferi-pidtrimki-malogo-i-serednogo-biznesu/">http://ukrrp.org/eu4business-week-forum-donoriv-u-sferi-pidtrimki-malogo-i-serednogo-biznesu/</a>
	Business Forum “Ukraine – the country of entrepreneurs” was held on 2016. The program includes a panel discussion "Prospects for Small Business Development in Ukraine: State Programs and Initiatives Support", as well as "Business in Ukraine: The Way to Success", which involves a presentation of local entrepreneurs willing to share their successful experiences.	<a href="https://www.unian.ua/business/1680272-v-ivano-frankivsku-rozpochav-robotu-biznes-forum-ukrajina-krajina-pidpriemstv.html">https://www.unian.ua/business/1680272-v-ivano-frankivsku-rozpochav-robotu-biznes-forum-ukrajina-krajina-pidpriemstv.html</a> <a href="https://westnews.com.ua/v-ivano-frankivsku-vidbuvsya-biznes-forum-ukrajina-krajina-pidpriemstv-foto/">https://westnews.com.ua/v-ivano-frankivsku-vidbuvsya-biznes-forum-ukrajina-krajina-pidpriemstv-foto/</a>
World business cafe	On April 2, 2018, in Ivano-Frankivsk, Export Promotion Office’s She Exports Platform continues a series of meetings in the “world business cafe” format to help women entrepreneurs who seek to develop exports of their goods and services exchange experiences.	<a href="https://cutisproject.org/en/pec-events/world-cafe-ivano-frankivsk/">https://cutisproject.org/en/pec-events/world-cafe-ivano-frankivsk/</a>
EcogeoForum	"EcogeoForum-2018: modern youth for a clean environment" was held on April 2018.	<a href="http://www.if.gov.ua/news/ekogeoForum-2018-suchasna-molodza-chiste-dovkillya">http://www.if.gov.ua/news/ekogeoForum-2018-suchasna-molodza-chiste-dovkillya</a>
II International Forum of partner cities	The Forum main purpose is to demonstrate an economic and investment potential of Ivano-Frankivsk, to intensify cooperation of business circles in the production of goods and services, and to present actual infrastructure projects of the city.	<a href="https://mi100.info/2017/10/27/v-ivano-frankivsku-startuvav-iii-mizhnarodnyj-forum-partnerskyh-mist/">https://mi100.info/2017/10/27/v-ivano-frankivsku-startuvav-iii-mizhnarodnyj-forum-partnerskyh-mist/</a>
Meeting with Association “Ukrainian business initiative” (01/12/2017)	Topic of discussion: Finding ways to prevent economic and political bankruptcy in Ukraine, what steps should be taken to rebuild economy and social sphere, restart public administration system, and implement Ukraine's development	<a href="http://cci.if.ua/">http://cci.if.ua/</a>



	plan.	
Workshop of opportunity for business and investment activities in Germany (23/09/2017)	Familiarization of businessmen of Ivano-Frankivsk region with conditions of export-import activity, production and commercial cooperation with German firms; Preparation for participation of Ukrainian enterprises in the third German-Ukrainian Business Forum in Germany.	<a href="http://cci.if.ua/?event-page=2">http://cci.if.ua/?event-page=2</a>

### **Ternopil region**

Ternopil region conducts many international events for the purpose of raising investment attractiveness and popularization of the region, for example:

- The First Europe-Ukraine Forum, Republic of Poland (January 27-28, 2017);
- Days of Ternopil region in Kyiv (February 14, 2017), with participation of representatives of foreign diplomatic institutions accredited in Ukraine;
- 3rd European Congress of Local Self-Government, Krakow, Republic of Poland (March 27-29, 2017);
- International Investment Forum "Ternopil Region Invest-2017", Zbarazh (May 24, 2017); Ternopil (May 25, 2017).

The **Ternopil Region Invest Forum** seems to be the most large-scale event of the region. The Forum started in 2016 and is an annual event. Leaders of the country, government, central executive authorities of Ukraine, regional state administrations, local authorities of Ukraine, foreign diplomatic missions and international organizations accredited in Ukraine, regions of partner countries and potential partners participate in the Forum.

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

**Table 1.34. Overview of sector events in Ternopil region**

<b>Event</b>	<b>Description</b>	<b>Links</b>
“Ternopil Region Invest“ International Investment Forum	The Forum started in 2016. During the Forum the potential and current investment projects of Ternopil region are presented, Memoranda and Agreements on cooperation are signed.	<a href="http://www.te-invest.com/">http://www.te-invest.com/</a> <a href="http://www.oda.te.gov.ua/">http://www.oda.te.gov.ua/</a>

Training for SME representatives	The Training "Leasing: features of service and benefits for the client" was organized by TCCI. The National Association of Agricultural Advisory Services of Ukraine together with the USAID Transformation of the Financial Sector Project and in cooperation with the "Ukrainian Association of Lessors" conducted training for representatives of SME.	<a href="http://tcci.te.ua/tcci/ua/investyt-siini-ta-komertsiiini-propozytsii/zakhody/1345-treninh-dlia-predstavnykiv-maloho-ta-serednoho-biznesu-lizynh-osoblyvosti-posluhy-ta-perevahy-dlia-klienta">http://tcci.te.ua/tcci/ua/investyt-siini-ta-komertsiiini-propozytsii/zakhody/1345-treninh-dlia-predstavnykiv-maloho-ta-serednoho-biznesu-lizynh-osoblyvosti-posluhy-ta-perevahy-dlia-klienta</a>
Agro Workshop	Soufflet Agro Workshop - traditional winter seminar for agricultural producers – clients of SOUFFLET AGRO UKRAINE. The workshop has been held in Ternopil since 2017.	<a href="http://www.soufflet-agro.com.ua/uk/podiyi/zimovij-seminar-ternopil-2018">http://www.soufflet-agro.com.ua/uk/podiyi/zimovij-seminar-ternopil-2018</a>
	Agro Workshop in Vienna. Specialists of "Agroprodservice" took part in the workshop by "Dunatska Soya" Association in Vienna. The participants discussed perspectives and complexities of the development of agro-farms growing soya in different regions (Western, Central and Eastern Europe).	<a href="http://agroprodservice.com.ua/2018/04/23/spetsialisty-agroprodservisuvzyaly-uchast-u-seminari-asotsiatsiyi-dunatska-soya-u-vidni/">http://agroprodservice.com.ua/2018/04/23/spetsialisty-agroprodservisuvzyaly-uchast-u-seminari-asotsiatsiyi-dunatska-soya-u-vidni/</a>
	Alfa Smart Agro Workshop, which is among the top 5 market leaders in Ukraine's plant protection products, has already started a traditional series of winter training workshops "Innovative solutions in plant protection". This year company specialists present 9 new products and an expanded team of technical consultants.	<a href="http://agroportal.ua/ua/publishing/sobytiya/seminary-alfa-smart-agro-kak-uchenye-kompanii-sobirayut-superanshlagi/">http://agroportal.ua/ua/publishing/sobytiya/seminary-alfa-smart-agro-kak-uchenye-kompanii-sobirayut-superanshlagi/</a>
	The Kremenets Regional Center for Business Support organized the seminar "Organic Berry Growing Technology" (raspberries, strawberries, cherries, red ribbon, gooseberries, rhubarb) with participation of specialists from Polko Grup, one of the main exporters of berry products in Ukraine.	<a href="http://tgn.in.ua/2018/01/17/pid-pryjemtsiv-ternopilschyny-zaproschuyut-na-seminar-z-tehnolohiji-vyroschuvannya-orhanichnyh-yahid/">http://tgn.in.ua/2018/01/17/pid-pryjemtsiv-ternopilschyny-zaproschuyut-na-seminar-z-tehnolohiji-vyroschuvannya-orhanichnyh-yahid/</a>
Business Community Club	Business Community Club operates in the interests of small businesses of Ukraine and has an aim of country development through the impact on social and economic processes in Ukraine.	<a href="https://bc-club.org.ua/bc-club/proekty-klubu.html">https://bc-club.org.ua/bc-club/proekty-klubu.html</a>

Nove zerniatko	Open-air trade show organized by Agroprodservice.	<a href="http://novezernyatko.com.ua/">http://novezernyatko.com.ua/</a>
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### **Chernivtsi region**

Unfortunately, there is not enough information about sectoral activities in Chernivtsi region that indicates a low activity of the region in this respect. Basically, there is some information about events carried out several years earlier. The most important and biggest ones are the following:

- Business Forum “Ukraine – the country of entrepreneurs” (held in 2016). The program included a panel discussion "Prospects for Small Business Development in Ukraine: State Programs and Initiatives Support" as well as "Business in Ukraine: The Way to Success", which involved the presentation of local entrepreneurs willing to share their successful experiences.
- "Gardening Workshop" by Syngenta Company (2017). The seminar was based on the Dniester Gardens farm located in Chernivtsi region (Selyshche village, Sokyryany district). Over one hundred gardeners from Bukovyna and other regions of Ukraine visited the workshop, which took place on the territory of modern high-tech garden.

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

**Table 1.35. Overview of sector events in Chernivtsi region**

<b>Event</b>	<b>Description</b>	<b>Links</b>
Agro workshop, 2017	On August 22, 2017, Syngenta Company held one of its traditional summer workshops - "Gardening Workshop" based on the Dniester Gardens farm located in Chernivtsi region (Selyshche village, Sokyryany district). Over one hundred gardeners from Bukovyna and other regions of Ukraine visited the seminar, which took place on the territory of modern high-tech garden.	<a href="http://www.agrotimes.net/foto/album/seminar-majsternya-sadivnictva--chernivecka-oblasti-serpen-2017-roku">http://www.agrotimes.net/foto/album/seminar-majsternya-sadivnictva--chernivecka-oblasti-serpen-2017-roku</a>
Business Forum, 2016	Business Forum “Ukraine – the country of entrepreneurs” was held in 2016. The program included a panel discussion "Prospects for Small Business Development	<a href="https://www.unian.ua/business/1667796-u-chernivtsyah-prohodit-regionalniy-biznes-forum-ukrajina-krajina">https://www.unian.ua/business/1667796-u-chernivtsyah-prohodit-regionalniy-biznes-forum-ukrajina-krajina-</a>

	in Ukraine: State Programs and Initiatives Support" as well as "Business in Ukraine: The Way to Success", which involved the presentation of local entrepreneurs willing to share their successful experiences.	<a href="http://pidpriemtsiv.html">pidpriemtsiv.html</a>
Petrovsky Fair, 2014	Annual Fair. Industrial and food products. Folk crafts. Artistic products and more.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Bukovinian spring" Fair, 2014	Specialized exhibition-fair. Seeds, seedlings, garden tools.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Garden. Backyard" Fair, 2014	Specialized exhibition-fair.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Energy saving. Construction" Exhibition, 2014	Interregional specialized exhibition. Building materials. Energy saving in construction and heating.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Bukderev-2013" Exhibition	Interregional specialized exhibition Woodworking equipment, technologies and tools for wood processing.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Heating. Construction" Exhibition, 2014	Interregional specialized exhibition. Systems of heating, water supply, ventilation; construction and finishing materials, plumbing, etc.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>
"Bukovyna Autumn" Exhibition-fair, 2014	Annual Specialized exhibition-fair. Seeds, seedlings, garden tools.	<a href="http://chcci.ucoz.ua/index/v_oblasti/0-65">http://chcci.ucoz.ua/index/v_oblasti/0-65</a>

### **Zakarpattia region**

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

- International conference "Promoting Euro-Atlantic integration of Ukraine taking Zakarpattia as an example"
- Investment forum "Zakarpattia – business in the centre of Europe" was organized and held by the Regional State Administration on November 12, 2017. During three sessions – "Investments into the regional economy", "Energy efficiency and energy effectiveness" and "Tourist brands of the season 2018 – competitiveness and novelty" – there were interesting discussions and introduction of new approaches in investment activity. A number of

memoranda with banking institutions and consulting agencies were signed during the Forum in order to support and develop business in Zakarpattia.

- Business Forum “International contact days – 2017”
- Mukachevo Business Forum

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

**Table 1.36. Overview of sector events in Zakarpattia region**

Event	Description	Links
Business Forum “International contact days – 2017”	February 16-17, 2017. Agricultural machinery and spare parts. Garden tools. Sowing materials. Fertilizers and poisons. Agricultural products and processing products. Equipment and technology for the food and processing industry. Food products. Packing and packaging equipment. Organized by CCI.	<a href="http://www.tpp.uzhgorod.ua/ukr/page-440.html">http://www.tpp.uzhgorod.ua/ukr/page-440.html</a>
	March 23-24, 2017. Logging, woodworking. Furniture production. Machinery, equipment, technology. Furniture for residents, office, garden, special. Furniture blocks, accessories. Joinery. Organized by CCI.	<a href="http://www.tpp.uzhgorod.ua/ukr/page-440.html">http://www.tpp.uzhgorod.ua/ukr/page-440.html</a>
	April 20-21, 2017. Light industry; garment, fur, leather and footwear industry; textile and knitwear production; modern production technologies, equipment and materials; fabrics, knitwear, clothing and footwear; leather and fur products; haberdashery goods; beauty industry. Organized by CCI.	<a href="http://www.tpp.uzhgorod.ua/ukr/page-440.html">http://www.tpp.uzhgorod.ua/ukr/page-440.html</a>
	May 25-26, 2017. Machine-building and metal working. Metal products, metal constructions. Modern technologies in the metalworking industry. Equipment and tools. Realization of metal products. Preparation of scrap metal. Organized by CCI.	<a href="http://www.tpp.uzhgorod.ua/ukr/page-440.html">http://www.tpp.uzhgorod.ua/ukr/page-440.html</a>
	November 16-17, 2017. Construction - projects and technologies. Construction machinery and materials. Plumbing, heating, ventilating, and lighting equipment. Interior items for residential and office premises. Construction chemistry. Joinery. Organized by CCI.	<a href="http://www.tpp.uzhgorod.ua/ukr/page-440.html">http://www.tpp.uzhgorod.ua/ukr/page-440.html</a>

Investment forum “Zakarpattia – business in the centre of Europe”	Large-scale investment forum “Zakarpattia – business in the centre of Europe”.	<a href="http://www.m-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=3286:-1-r&amp;catid=93:2015-09-22-11-38-52&amp;Itemid=19">http://www.m-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=3286:-1-r&amp;catid=93:2015-09-22-11-38-52&amp;Itemid=19</a>
International business meeting	November 18, 2016, Uzhgorod. Topics: construction - technologies, equipment and materials; plumbing, heating, ventilation, and lighting equipment; construction chemistry; interior items; joinery and furniture products.	<a href="http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=10515:mizhnarodna-biznes-zustrich&amp;catid=81&amp;Itemid=750">http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=article&amp;id=10515:mizhnarodna-biznes-zustrich&amp;catid=81&amp;Itemid=750</a>
Exhibitions and Conferences	List of exhibition and conferences in Uzhgorod organized by CCI.	<a href="http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=category&amp;id=81&amp;Itemid=750&amp;limitstart=0">http://uzh-rda.gov.ua/index.php?option=com_content&amp;view=category&amp;id=81&amp;Itemid=750&amp;limitstart=0</a>
Invest Business Forum	On November 18, 2017, in Uzhgorod there was the business forum “Opportunities for financing foreign investments and unused opportunities for market access”.	<a href="http://prozahid.com/content-52028.html">http://prozahid.com/content-52028.html</a>
IV All-Ukrainian Youth Forum of Interaction and Development	On May 18, 2018, the IV All-Ukrainian Youth Forum for Interaction and Development took place in the Zakarpattia Regional State Administration. The purpose of organizers was to raise awareness among young people about the value and importance of volunteering, to exchange experiences in implementing the best national and international volunteer practices, and to promote examples of interaction between business and volunteer organizations.	<a href="https://carpathia.gov.ua/novyna/zavtra-v-uzhgorodi-zbyrayetsya-yseukrayinsky-molodizhnyy-forum-vzayemodiyi-ta-rozvytku">https://carpathia.gov.ua/novyna/zavtra-v-uzhgorodi-zbyrayetsya-yseukrayinsky-molodizhnyy-forum-vzayemodiyi-ta-rozvytku</a>
International conference “Promoting Euro-Atlantic integration of Ukraine taking Zakarpattia as an example”	On May 25, 2018, in Uzhgorod. International conference “Promoting Euro-Atlantic integration of Ukraine taking Zakarpattia as an example”. There were around 150 representatives of the state authorities and local authorities in Hungary and Ukraine, as well as the Committee of the Regions of the EU (Brussels, Belgium).  The purpose of the conference is to present opportunities and particular proposals for development, support for cooperation in modern	<a href="https://carpathia.gov.ua/novyna/v-uzhgorodi-vidbudetsya-mizhnarodna-konferenciya-spryannya-yevroatlantychniy-integraciyi">https://carpathia.gov.ua/novyna/v-uzhgorodi-vidbudetsya-mizhnarodna-konferenciya-spryannya-yevroatlantychniy-integraciyi</a>

	administrative, economic and cultural sectors, EU neighborhood policy, support for Ukraine and Zakarpattia by the Government of Hungary, the role and potential of IIST in the development of cross-border and regional cooperation, presentation of integrated development packages, acquaintance with cross-border and Brussels sources of financial support.	
Conference “Intense organic garden on the M9 rootstock”	Seed field of fruit and energy crops SE “Holland Plant Ukraine” organized an international scientific and practical conference “Intense organic garden on the M9 rootstock” within the framework of the annual open day. The conference was held on July 14, 2017 in Uzhgorod, Zakarpattia region.	<a href="https://agrostory.com/info-centre/the-events-market/konferentsiya-intensivnyy-organicheskiy-sad-na-m9-podvoe/?sphrase_id=2241233">https://agrostory.com/info-centre/the-events-market/konferentsiya-intensivnyy-organicheskiy-sad-na-m9-podvoe/?sphrase_id=2241233</a>
Mukachevo Business Forum	Mukachevo Business Forum presented for foreign guests, investors and forum participants a master plan for the development of south-western part of the city where the former military airfield is located.	<a href="http://mukachevo.today/video/video/mukachevo_biznes_forum_ch3_koncepcija_rozvitku_zemel_buvshogo_aerodromu_ch2">http://mukachevo.today/video/video/mukachevo_biznes_forum_ch3_koncepcija_rozvitku_zemel_buvshogo_aerodromu_ch2</a>

### Lviv region

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

- Agroport West Lviv Exhibition Annual VII International Agro-Industrial Exhibition and Forum for the farming development.
- Specialized exhibition “AgroMachinery-2018”. Main purpose of the spring exhibition is to give an opportunity to the local agricultural workers and farmers to choose and to purchase machinery, spare parts and components in the beginning of sowing campaign. Agricultural exhibition in Lviv will help managers of agricultural enterprises and farms to understand the variety of agricultural machinery, clearly evaluate proposals, analyze opportunities and ratio of quality and price.
- Spring Business Forum. The main goals of the Forum are the following ones: to define current state and future prospects of the Ukraine economic development in terms of short-term and long-term horizons by means of expert studies; to provide qualitative analysis of a number of elements affecting business in Ukraine with the purpose of taking the most reasonable and appropriate decisions by company owners and managers; to establish cooperation between entrepreneurs and representatives of the state and local authorities from different regions of Ukraine, as well as foreign investors.



- Lviv Export Forum 2018. Main task of the Lviv export forum is to promote development of the Ukrainian export. During the Forum entrepreneurs learned about the programs of support for Ukrainian enterprises (including presentation of the international programs on promoting entrance of other markets), became familiar with successful cases / examples of companies; participated in discussions of actual questions and perspectives of this direction of economy of the Lviv region and country in a whole.

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

**Table 1.37. Overview of sector events in Lviv region**

Event	Description	Links
Business Community Club of the Lviv region	Business Community Club operates in the interests of small businesses of Ukraine and has an aim of country development through its impact on social and economic processes in Ukraine. The club organizes business events.	<a href="https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLwY_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf">https://www.facebook.com/bc.club.if/?hc_ref=ARQbWXMZ1kLwY_H647iIY7TM3kSK6LX73vMQDJiDRreAZoliF93LDG8Bv6Gb40EEtI&amp;fref=nf</a>
«Business Incubator». Open lectures for entrepreneurs	Open lectures for owners of small and medium business, startup-entrepreneurs and active people who start thinking about their own business	<a href="https://www.facebook.com/events/2010894022517622/">https://www.facebook.com/events/2010894022517622/</a>
Workshop «CUFTA in action: opportunities for free trade with Canada»	On July 13, 2017, there was a workshop in Lviv Chamber of Commerce and Industry: «CUFTA in action: opportunities for free trade with Canada». Participants discussed opportunities that are opening in front of Ukraine after signing Canada-Ukraine Free Trade Agreement (CUFTA).	<a href="https://lcci.com.ua/cufta-v-diji-mozhlyvosti-vilnoji-torgivli-z-kanadoyu/">https://lcci.com.ua/cufta-v-diji-mozhlyvosti-vilnoji-torgivli-z-kanadoyu/</a>
Soufflet Agro Workshop	Traditional winter seminar for agricultural producers.	<a href="http://www.soufflet-agro.com.ua/uk/podiyi/zimovij-seminar-lviv-2018">http://www.soufflet-agro.com.ua/uk/podiyi/zimovij-seminar-lviv-2018</a>
Agroport West Lviv	Annual VII International Agro-Industrial Exhibition and Forum for the development of Farming.	<a href="http://2018.agroport.ua/lviv/">http://2018.agroport.ua/lviv/</a>
XI Specialized Exhibition “AgroMachinery – 2018”	Annual Exhibition.	<a href="http://agt.expolviv.ua/">http://agt.expolviv.ua/</a>
EuroAgro-2018	November 22-24, 2018, there will be held the III International Agricultural Exhibition «EuroAGRO-2018» that is a bright example of	<a href="https://www.agroone.info/agroevent/euroagro-2018/">https://www.agroone.info/agroevent/euroagro-2018/</a>



**ITFC - Ukrainian Industry Expertise**

	cooperation between two countries-organizers – Targi Kielce S.A. (Poland, Kielce) and PJSC “Gal-EXPO” (Lviv, Ukraine).	
Turkish-Ukrainian business forum	On April 27–28, 2017, there was held the Turkish-Ukrainian business forum in Lviv region. Participants of the forum were top managers of big Turkish companies and joint Turkish-Ukrainian enterprises operating in Ukraine, as well as heads of the biggest companies with foreign capital in Lviv region.	<a href="http://loda.gov.ua/news?id=27223">http://loda.gov.ua/news?id=27223</a>
Spring Business Forum	Annual Spring Business Forum	<a href="https://www.dilovyy-forum.com.ua/">https://www.dilovyy-forum.com.ua/</a>
Polish-Ukrainian business meeting	On May 22, 2018, there was a meeting of participants of the Elblong Science and Economic mission of Polish entrepreneurs together with Ukrainian entrepreneurs and partners in the Lviv Chamber of Commerce and Industry. The event was organized jointly with the Government of the President of the city of Elblong and with support of the Consul General in Lviv, Rafal Wolski.	<a href="https://lcci.com.ua/polsko-ukrajinska-dilova-zustrich/">https://lcci.com.ua/polsko-ukrajinska-dilova-zustrich/</a>
International conference “Economic bridge: Lodz region – Ukraine 2018”	The Lodz Chamber of Industry and Commerce was an organizer of the event. Participants of the event were 40 entrepreneurs and representatives of business associations in Ukraine, more than 70 participants from the Lodz region and Poland that represented mostly key industries that are engines of growth for local economy (pharmaceutical industry, modern textile industry, modern building materials, innovative, agriculture and agroprocessing, IT and telecommunications). Lviv region was represented by 6 enterprises and Lviv Chamber of Commerce and Industry.	<a href="https://lcci.com.ua/gospodarskyj-mist-lodzkyj-region-ukrajina-2018/">https://lcci.com.ua/gospodarskyj-mist-lodzkyj-region-ukrajina-2018/</a>
Project on bilateral technical cooperation “Advisory services for enterprises related to energy efficiency”	Ministry of Economic Development and GIZ invite companies to participate in pilot projects on energy efficiency.	<a href="https://lcci.com.ua/minekonomroz-vytku-ta-giz-zaproshuyut-kompaniji-do-uchasti-u-pilotnyx-proektax-z-energoefektyvnosti/">https://lcci.com.ua/minekonomroz-vytku-ta-giz-zaproshuyut-kompaniji-do-uchasti-u-pilotnyx-proektax-z-energoefektyvnosti/</a>
Lviv Export Forum	Discussion about export potential of products of Ukrainian and Lviv enterprises.	<a href="https://lcci.com.ua/lvivskyj-eksportnyj-forum-novyny/">https://lcci.com.ua/lvivskyj-eksportnyj-forum-novyny/</a>

<p>II European Congress of Local government bodies</p>	<p>President of the Lviv Chamber of Commerce and Industry, Dmytro Aftanas, was a speaker at one of the largest European events – II European Congress of Local governance that took place on April 5-6, in Krakow.</p>	<p><a href="https://lcci.com.ua/vidbuvsya-ii-yevropejskyj-kongres-organizatsiyi-miscevogo-samovvryaduvannya/">https://lcci.com.ua/vidbuvsya-ii-yevropejskyj-kongres-organizatsiyi-miscevogo-samovvryaduvannya/</a></p>
<p>COSME (Competitiveness of Small and Medium Enterprises)</p>	<p>Through the programme participation Ukrainian entrepreneurs will be able to facilitate their entrance to the EU market, find partners, participate in workshops and internships, will have a full access to the European network of enterprises.</p>	<p><a href="https://lcci.com.ua/cosme-programa-konkurentozdatnist-pidpryemstv-msp/">https://lcci.com.ua/cosme-programa-konkurentozdatnist-pidpryemstv-msp/</a></p>
<p>Events for the first quarter of 2017</p>	<p>A list of main events of foreign economic activity of the Chamber for the I quarter of 2017.</p>	<p><a href="https://lcci.com.ua/zaxody-na-druge-pivrichchya-2016-roku/">https://lcci.com.ua/zaxody-na-druge-pivrichchya-2016-roku/</a></p>
<p>Business Forum “Ukraine – Cyprus”</p>	<p>On May 25, 2018, the Lviv Chamber of Commerce and Industry in cooperation with the Cyprus Chamber of Commerce and Industry and Cyprus-Ukraine business Association conducted Business Forum “Ukraine – Cyprus”. During the event there were presented advantages and potential of Cyprus for the Ukrainian business and potential of the Ukrainian business environment for cooperation with the Cypriot partners.</p>	<p><a href="https://lcci.com.ua/pro-dilovyi-forum-ukrajina-kipt/">https://lcci.com.ua/pro-dilovyi-forum-ukrajina-kipt/</a></p>
<p>Ukrainian – Polish Business Forum in Lviv region</p>	<p>On May 17, 2018, the Lviv Chamber of Commerce and Industry was a co-organizer of the Ukrainian-Polish Business Forum in Lviv region. There were 150 participants at the Forum – entrepreneurs, experts, scholars, government officials and representatives of business associations from Ukraine and Poland (60 out of which were from Poland). The Forum showed a need for urgent solution of problems in business cooperation of both countries: firstly, development of cross-border infrastructure, as well as currency regulation during the implementation of foreign economic operations, ineffective regulation of investment activity in Ukraine.</p>	<p><a href="https://lcci.com.ua/kooperaciya-biznesu-ta-vlady-derzhav-susidiv/">https://lcci.com.ua/kooperaciya-biznesu-ta-vlady-derzhav-susidiv/</a></p>
<p>“Ukrainian – Bavarian business forum in Lviv</p>	<p>On June 21, 2018, in the conference room of “Grand Hotel” in Lviv there was held</p>	<p><a href="https://lcci.com.ua/nimecko-ukrajinski-perspektyvy/">https://lcci.com.ua/nimecko-ukrajinski-perspektyvy/</a></p>

region”	“Ukrainian – Bavarian business forum in Lviv region”	
The Day of Vietnam in Lviv	On June 21, 2018, in Lviv there was held the Day of Vietnam. A big delegation of artists and entrepreneurs was headed by the Extraordinary and Plenipotentiary Ambassador of the Republic of Vietnam in Ukraine Mr. Nguyen Anh Tuan. Within the event framework there was a round table to present potential of cooperation between Lviv region and Vietnam, first of all in the field of tourism, as well as in investment and trade.	<a href="https://lcci.com.ua/v-yetnamski-akcenty/">https://lcci.com.ua/v-yetnamski-akcenty/</a>

### Volyn region

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

- *Business Forum “Volyn – Invest 2018”* - On September 21, 2018, in the city of Lutsk in the shopping and entertainment center “Promin” an investment business forum “Volyn Invest 2018” will take place. The main purpose of the Forum is to demonstrate advantages of the region and search for potential investors. A number of delegations from abroad have already confirmed their participation in the event. Among them - delegations from India, China, Austria, Poland and many other countries.
- *International Agroforum “Agrarians – potential of Ukraine. Focus on export”* - was held on January 26-30, 2017. The Forum organizers are the Consulate General of the Republic of Poland, Charity organization “VSI” and Integration Polish-Ukrainian center “Zamlynnya”. Representatives of enterprises from Poland and Ukraine, representatives of government / non-government organizations that achieved significant results in the field of agribusiness and are successful elements of Ukraine agro-sector, were invited by the speakers of the Agroforum.
- *All-Ukrainian Forum “AGRO-V”* – on March 10, 2017. A line of feed additives and granulated food for livestock: chicken, pigs, cattle and other animals was presented.

The table below illustrates business events in agro and industry sectors in more details. Volyn CCI and RDA helps and assists in conducting business forums and conferences in the region.

**Table 1.38. Overview of sector events in Volyn region**

Event	Description	Links
Volyn Business-Invest Forum	On September 21, 2018, in the city of Lutsk in the shopping and entertainment center “Promin” an investment business forum “Volyn Invest 2018” is scheduled. Its main task is presentation of investment attractiveness of Volyn region.	<a href="https://www.volyn.com.ua/news/106844-na-volyni-proide-biznes-forum">https://www.volyn.com.ua/news/106844-na-volyni-proide-biznes-forum</a>
Agro Forum	The International Agroforum “Agrarians – potential of Ukraine. Focus on export” was held on January 26-30, 2017, in the Integration center of Zamlynnya. The Forum organizers are the Consulate General of the Republic of Poland, Charity organization “VSI” and Integration Polish-Ukrainian center “Zamlynnya”.	<a href="https://www.facebook.com/events/756329621210335/">https://www.facebook.com/events/756329621210335/</a>
	On December 28, 2017, during the Agroforum in Lutsk the most promising directions of agribusiness in the nearest years was discussed. Implementation of the project “Support of Ukrainian-Polish initiatives on development of horticulture and berry growing in the region” is being conducted. Its next stage is two-day Agroforum that took place in Lutsk.	<a href="http://agroforum.net/v-yakij-agrobiznes-na-volini-najvigidnishe-vkladati-groshi/">http://agroforum.net/v-yakij-agrobiznes-na-volini-najvigidnishe-vkladati-groshi/</a>
	International Agro Forum. On October 25-26, 2017, there was an International Agroforum “Support of Ukrainian-Polish initiatives on development of horticulture and berry growing in the region”.	<a href="https://www.volyn-inviro.com.ua/novini/u-lutsku-vidbudetsya-mizhnarodnii-agroforum/">https://www.volyn-inviro.com.ua/novini/u-lutsku-vidbudetsya-mizhnarodnii-agroforum/</a>
	On March 10, 2017, All-Ukrainian Forum "AGRO-V". A line of feed additives and granulated food for livestock: chicken, pigs, cattle and other animals.	<a href="https://agro-v.com.ua/kompaniya-agro-v-provela-vseukrayinskiy-forum">https://agro-v.com.ua/kompaniya-agro-v-provela-vseukrayinskiy-forum</a>
Business conference	On May 8, 2018, in a conference hall of the Hotel “Ukraine”, a business conference "Innovations Management" was held. New tools for sustainable business development: energy management, ecology, labor protection.	<a href="https://vcci.com.ua/2018/05/tuv/">https://vcci.com.ua/2018/05/tuv/</a>
Business Forum	On March 2, 2018 in Lutsk, a Forum "Green Economy" took place in the hotel "Ukraine". Green solutions. Contact Exchange ". The event was organized by the Volyn Chamber of Commerce and Industry together with the NGO "Agency for International Cooperation" with support of the German Government's Program for Promoting Green Modernization of the Ukrainian Economy, implemented by Deutsche Gesellschaft für	<a href="https://vcci.com.ua/2018/03/green/">https://vcci.com.ua/2018/03/green/</a>

Event	Description	Links
	<p>Internationale Zusammenarbeit (GIZ) GmbH</p> <p>International Business Forum. On November 15, 2017, an international forum "Green Economy: An Innovative Way of the Region's Development" was held in Volyn, organized within the framework of the Green Economy Modernization Support Program implemented by GIZ on behalf of the Government of Germany.</p>	<p><a href="https://vcci.com.ua/2017/11/forum-7/">https://vcci.com.ua/2017/11/forum-7/</a></p>
International conference	<p>On January 27-28, 2017 an international meeting "Biznespartnertny 2017" took place in Lutsk in a format B2B, which was attended by representatives from Ukraine, Poland, Belarus, the Czech Republic, and Croatia. It is worth noting that such measures have become traditional and from year to year gather at the negotiating table an increasing number of business representatives from different countries.</p>	<p><a href="https://vcci.com.ua/2017/01/business-2/">https://vcci.com.ua/2017/01/business-2/</a></p>
International round table	<p>Within a framework of the signed Cooperation Agreement between the Kovel City Council and the Volyn Chamber of Commerce and Industry on November 29, 2007, a round table on "Government and business partners" took place in Kovel, with participation of Kovel City Mayor Oleh Kindera, President of the Volyn Chamber of Commerce and Industry - Oleksandr Smolich, representatives of customs, fiscal services and entrepreneurs in Kovel.</p>	<p><a href="https://vcci.com.ua/2016/11/kovel/">https://vcci.com.ua/2016/11/kovel/</a></p>
Ukrainian-Polish Forum	<p>On April 21-22, 2015, the Ukrainian-Polish forum about cooperation between Ukraine and Poland took place in the Consulate General of the Republic of Poland in Lutsk. The Polish delegation was headed by top managers of leading enterprises of the Velyko-Polish voevodstva of the agrarian sector, construction industry, economists and lawyers. There were representatives of business circles of Volyn, Rivne and Ternopil regions from the Ukrainian side.</p>	<p><a href="http://agrovolyn.gov.ua/news/polsko-ukrayinskiy-forum">http://agrovolyn.gov.ua/news/polsko-ukrayinskiy-forum</a></p>

**Rivne region**

In Rivne region there are several big events in the agrarian and business sectors:

- *Soufflet AGRO UKRAINE* - traditional winter workshop for agricultural producers. Topics: Crop 2017 in Ukraine and France; Agronomic survey of 2017 and tips for the new season; Presentation of a project SKY – SOILTEQ; Grain market analysis (logistics and VAT on oilseeds); Brewed barley seeds in the 2018 season.
- *Agro Forum Rivne* - main purpose of the Forum is to facilitate development of agribusiness communications with government agencies and academics, to attract domestic and foreign investment for small and medium-sized agricultural producers, and to discuss innovative projects that will ensure stable high yields and the production of highly competitive and export-oriented products. After all, this year, the agribusiness of Rivne region offers even more financial opportunities through state programs.
- *Agrarian Tax Forum April 25, 2018*. Forum of accountants and managers of enterprises and organizations of agro-industrial complex in Rivne.
- *Exhibition “Contemporary. Energy saving. Technologies. (CET-2018)”* - Interregional Investment Forum on Energy Efficiency and Energy Conservation IV International Specialized Exhibition "Contemporaneity. Energy saving. Technologies. (CET-2018)»
- *Business forum "Great Rivne. Invest potential "* - the event is aimed at combining efforts and capabilities of the Government, regional and local authorities, domestic and international business structures, donor organizations, the public of Rivne and the region, aimed at increasing competitiveness of the region economy; energy saving; efficient use of transit potential, human, industrial, natural resources of Rivne region and regional center. Within a framework of the Forum it is planned to familiarize with the potential of the city of Rivne and the region, presentation of investment projects, discussion of development prospects of branches of the economic complex of Ukraine and the region.

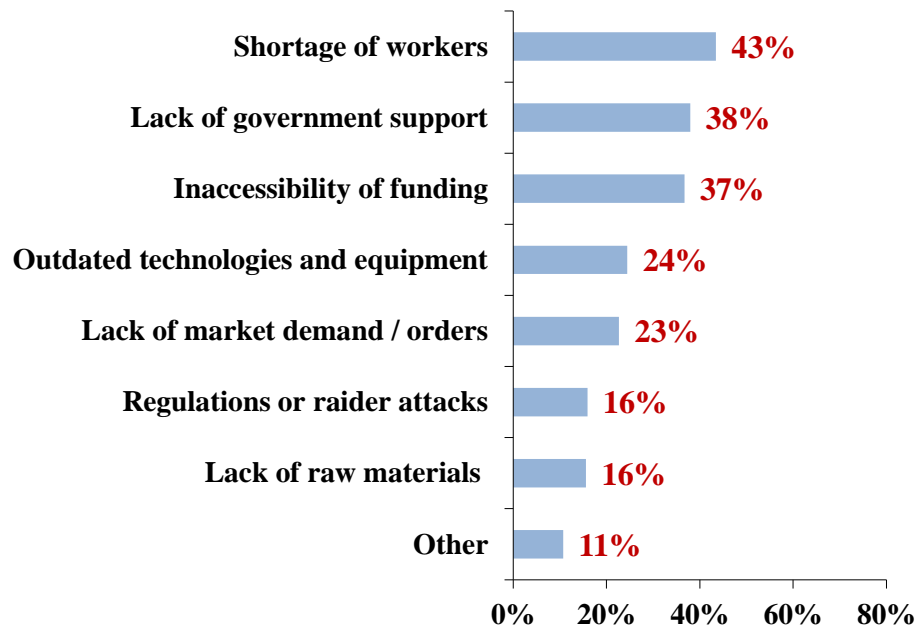
**Table 1.39. Overview of sector events in Rivne region**

Event	Description	Links
Exhibition	Architecture. Construction. Comfort. 20-21.04.2017	<a href="http://www.rcci.rivne.com/?pg=expo&amp;lng=ua">http://www.rcci.rivne.com/?pg=expo&amp;lng=ua</a>
Agro Forum Rivne	February 23, 2018, the Agro Forum in Rivne took place: more opportunities for the agro industrial complex.	<a href="http://www.rv.gov.ua/sitenew/main/ua/news/detail/51172.htm">http://www.rv.gov.ua/sitenew/main/ua/news/detail/51172.htm</a> <a href="http://agroforum.tilda.ws/">http://agroforum.tilda.ws/</a>
Soufflet Agro Workshop	Annual traditional winter seminar for agricultural	<a href="http://www.soufflet-">http://www.soufflet-</a>

	producers – clients of Soufflet Agro Ukraine.	<a href="http://agro.com.ua/uk/podiyi/zimovij-seminar-rivne-2018">agro.com.ua/uk/podiyi/zimovij-seminar-rivne-2018</a>
International Exhibitions and Forums	List of international exhibition and forums	<a href="http://www.rv.gov.ua/sitenew/main/ua/3060.htm">http://www.rv.gov.ua/sitenew/main/ua/3060.htm</a>
Agro Forum	April 26, 2018, a public discussion took place in Rivne with participation of authorities, business associations and experts. The best ways of developing the agrarian sector were discussed. Initiators and organizers of the event were the Rivne Regional Branch of the NGO "VBK" together with a permanent partner - the TV APPU in Rivne region.	<a href="https://balance.ua/news/post/post-reliz_260418_rv">https://balance.ua/news/post/post-reliz_260418_rv</a>
Agrarian Tax Forum	April 25, 2018. Forum of accountants and managers of enterprises and organizations of agro-industrial complex in Rivne.	<a href="https://balance.ua/club/seminar/s-forum-rovno-agro-250418">https://balance.ua/club/seminar/s-forum-rovno-agro-250418</a>
«Forum Organic Ukraine 2016»	Forum topic: Organic production - practical steps to enter the export markets. An organizer is the European Bank for Reconstruction and Development (EBRD), a branch partner of the project is NGO “Organic Ukraine”.	<a href="http://zdolbunivcity.net/rivnenskyj-rehionalnyj-forum-orhanichna-ukrajina-2016/">http://zdolbunivcity.net/rivnenskyj-rehionalnyj-forum-orhanichna-ukrajina-2016/</a>
Business forum "Great Rivne. Invest potential"	The event is aimed at combining efforts and capabilities of the Government, regional and local authorities, domestic and international business structures, donor organizations, the public of Rivne and the region, aimed at increasing competitiveness of the region economy; energy saving; efficient use of transit potential, human, industrial, natural resources of Rivne region and regional center.	<a href="https://www.facebook.com/forum.investinrivne.org/">https://www.facebook.com/forum.investinrivne.org/</a>
Exhibition "Contemporary. Energy saving. Technologies. (CET-2018)»	Interregional Investment Forum on Energy Efficiency and Energy Conservation IV International Specialized Exhibition "Contemporaneity. Energy saving. Technologies. (CET-2018)»	<a href="http://rivneteploenergo.com/iv-mizhnarodna-specializovana-vystavka-suchasnist-enerhozberezhennja-tehnolohijiset-2018/">http://rivneteploenergo.com/iv-mizhnarodna-specializovana-vystavka-suchasnist-enerhozberezhennja-tehnolohijiset-2018/</a>

### 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 Western Ukrainian regions 482 companies were contacted, of which 327 (68%) agreed to participate in the survey, and 155 (32%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 1.8. The rating of main obstacles for the development of sectors under investigation in Western Ukrainian regions**

The sectors under study face some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (43%), lack of government support (38%) and inaccessibility of funding (37%).

Western 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 8 000 - 10 000 (€250-320) 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.

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.

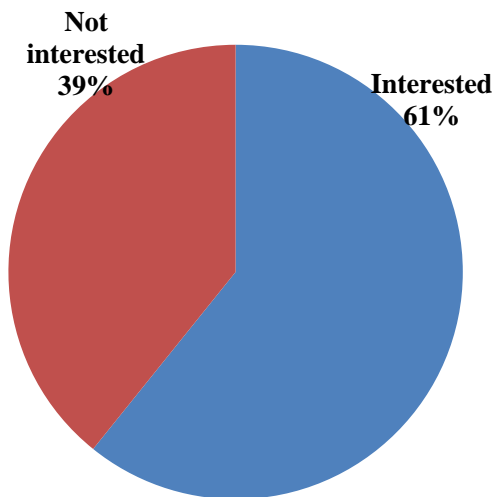
The main issue with financing appears to be two-fold. Bank interest rates at 22% are too high for the sectors under study, where margins are rarely above 20%. The other problem is access



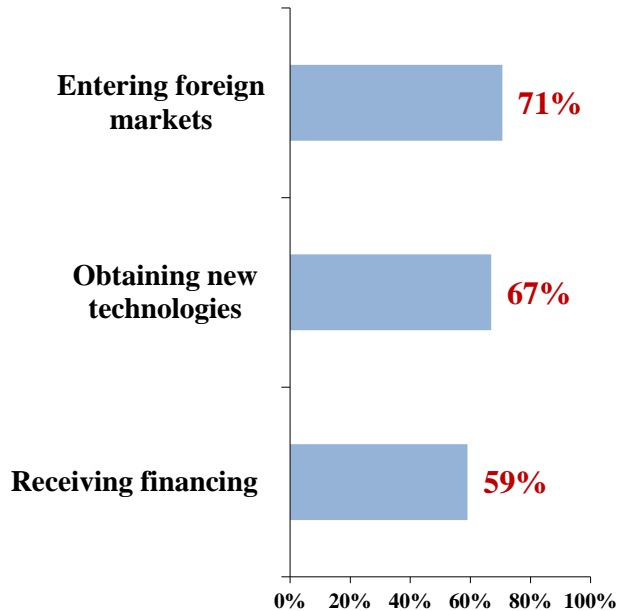
to finance for small businesses. In many cases they do not have detailed financial records, especially if they are using the Simplified Taxation system and cannot put up guarantees for loans.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 61% of the surveyed companies show interest in cooperation with the Dutch companies, first of all in entering foreign markets (71%), obtaining new technologies (67%), and receiving financing (59%).

The list of interviewed companies is presented in Annex 6, the list of enterprises / business associations interviewed in-depth is presented in Annex 11.



**Fig. 1.9. The interest of sectors under investigation enterprises in cooperation with the Dutch business**



**Fig. 1.10. Main areas of potential cooperation with the Dutch business in sectors under investigation, %**

## 2. Agro-food and Horticulture. Detailed sectoral analysis.

### 2.1. Production of fruits and berries

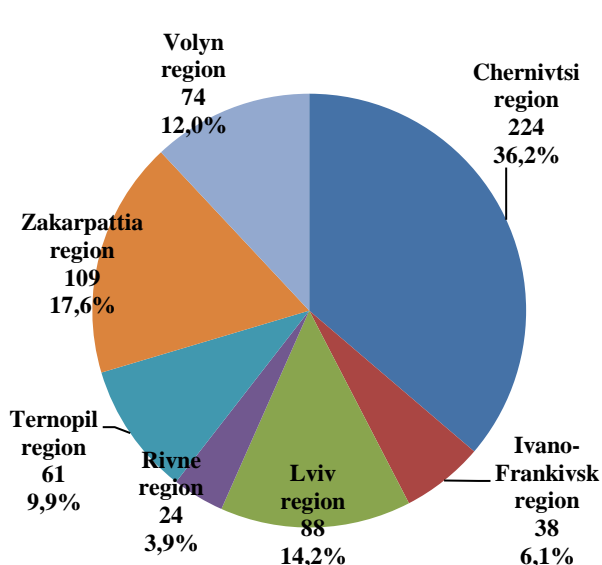
#### General overview of the sector

In the Western Ukrainian regions, there are 618 enterprises producing fruits and berries, 318 of which are legal entities (51%), and 300 - individual entrepreneurs (300%). The largest number of companies operates in Chernivtsi region (224 units or 36.2%), and the least - in Rivne region (24 units or 3.9%).

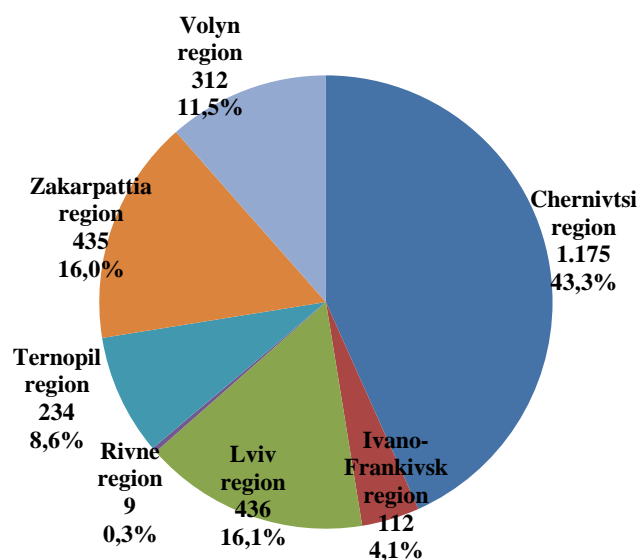
The sector is employing 2 713 full-time employees, including 2 373 in legal entities (87%), and 340 are employed by individual entrepreneurs (about 13%). The sector's leader by the number of employees is Chernivtsi region (1 175 people or 43%), while the smallest employment in the sector is in Rivne region (9 people or 0.3%).

**Table 2.1. Number of functioning enterprises and employment in production of fruits and berries in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	140	84	224	1 084	91	1 175
Ivano-Frankivsk region	26	12	38	73	39	112
Lviv region	42	46	88	390	46	436
Rivne region	8	16	24	8	1	9
Ternopil region	28	33	61	197	37	234
Zakarpattia region	31	78	109	355	80	435
Volyn region	43	31	74	266	46	312
<b>Total West Ukraine regions</b>	<b>318</b>	<b>300</b>	<b>618</b>	<b>2 373</b>	<b>340</b>	<b>2 713</b>



**Fig. 2.1. Breakdown of production of fruits and berries enterprises by regions, units.**



**Fig. 2.2. Regional employment structure in production of fruits and berries, people**

## Sales

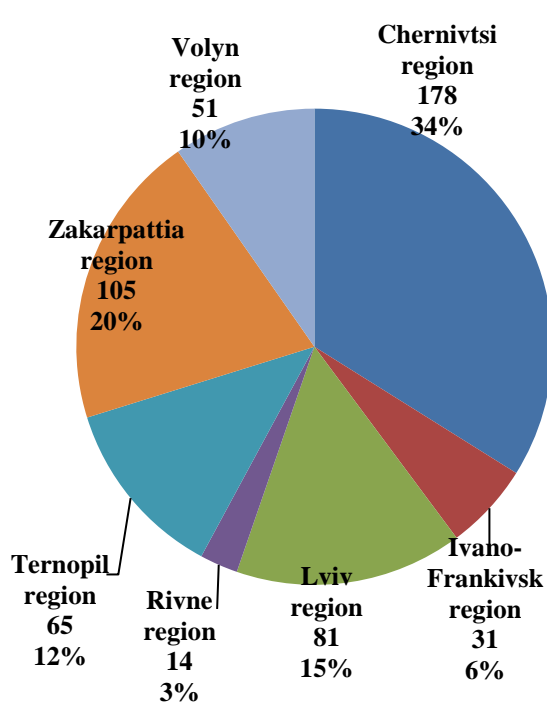
In 2016, sales volume of fruits and berries enterprises amounted to about UAH 525 million, of which UAH 459 million were generated by legal entities (almost 85%), and the rest UAH 66 million – by individual entrepreneurs (about 15%).

In the regional structure, the leaders are Chernivtsi region (UAH 178 million or 34% of sales), Zakarpattia region (UAH 105 million or 20%) and Lviv region (UAH 81 million or 16%). Together, these regions account for more than 70% of fruits and berries sales among the Western Ukrainian regions.

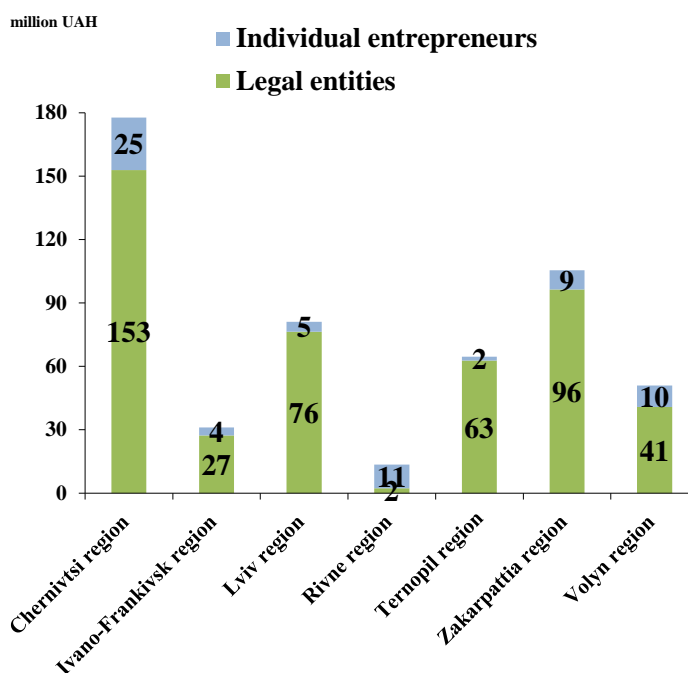
According to the results of companies' survey, the average level of sales through retail networks in fruits and berries production is about 35%.

**Table 2.2. The volume of sales of production of fruits and berries enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	152,9	24,9	177,8
Ivano-Frankivsk region	27,3	3,8	31,1
Lviv region	76,4	4,7	81,1
Rivne region	2,3	11,3	13,6
Ternopil region	62,7	1,9	64,6
Zakarpattia region	96,4	9,0	105,4
Volyn region	40,8	10,1	50,9
<b>Total West Ukraine regions</b>	<b>458,9</b>	<b>65,7</b>	<b>524,6</b>



**Fig. 2.3. Regional sales of production of fruits and berries products, million UAH**

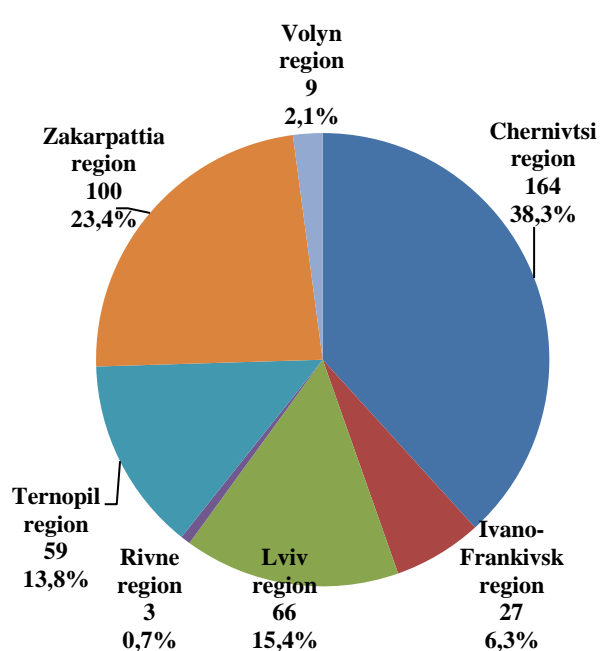


**Fig. 2.4. Regional sales of production of fruits and berries products by type of business entity, million UAH**

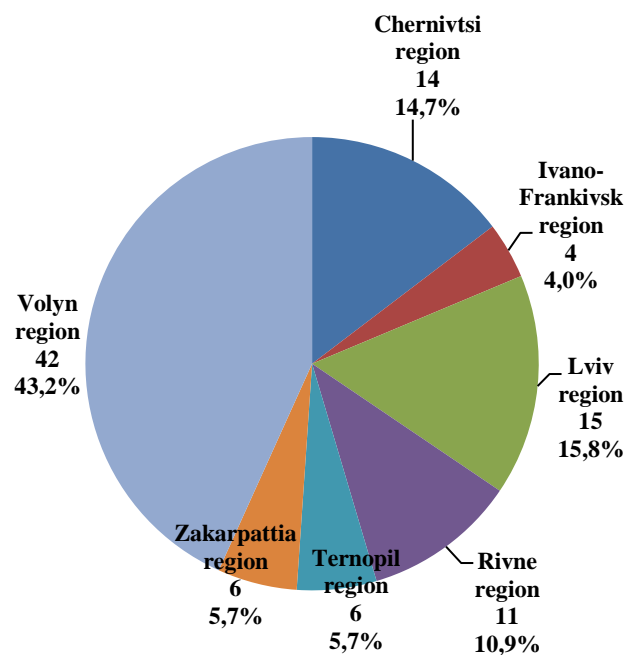
Pome fruits and stone fruits sales dominate in the commodity structure of sales (81% of total sales of the sector). Chernivtsi region is a leader in the pome fruits and stone fruits production (38% of total sales) and Volyn region – in other tree and bush fruits and nuts production (43%).

**Table 2.3. Sales of production of fruits and berries in 2016 by subsectors, mln. UAH**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Growing of other tree and bush fruits and nuts	14,2	3,9	15,3	10,6	5,5	5,5	41,9	96,8
Growing of pome fruits and stone fruits	163,7	27,1	65,9	3,0	59,1	100,0	9,0	427,8
<b>TOTAL</b>	<b>177,8</b>	<b>31,1</b>	<b>81,1</b>	<b>13,6</b>	<b>64,6</b>	<b>105,4</b>	<b>50,9</b>	<b>524,6</b>



**Fig. 2.5. Regional sales of pome fruits and stone fruits, million UAH**



**Fig. 2.6. Regional sales of bush fruits and nuts, million UAH**

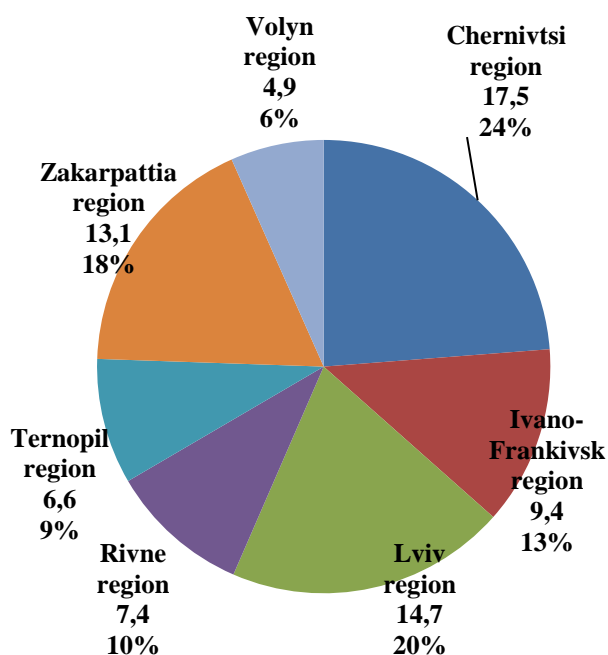
**Production**

The volume of fruits and berries production in Western Ukrainian regions under investigation in 2017 amounted to 659 thousand tons (about 32% of the total production in Ukraine), of which 552 were grown by households (83%), and 107 - agricultural enterprises (17%).

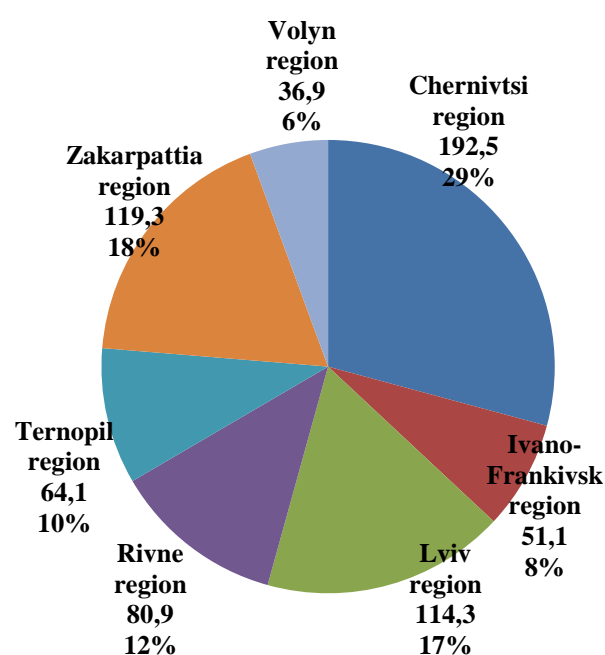
In a regional structure, the leader is Chernivtsi region (UAH 192,5 thousand tons or 29% of total production).

**Table 2.4. The volume of fruits and berries production in 2017**

Region	Total area of the plantations, thsd.ha			Volume of production, thsd. tons		
	Agricultural enterprises	Households	Total	Agricultural enterprises	Households	Total
Chernivtsi region	4,2	13,3	17,5	49,1	143,4	192,5
Ivano-Frankivsk region	1,8	7,6	9,4	4,6	46,5	51,1
Lviv region	2,1	12,6	14,7	18,1	96,1	114,3
Rivne region	0,3	7,1	7,4	0,2	80,7	80,9
Ternopil region	1,9	4,7	6,6	13,9	50,2	64,1
Zakarpattia region	1,4	11,7	13,1	14,8	104,5	119,3
Volyn region	1,8	3,1	4,9	6,4	30,5	36,9
<b>Subtotal 7 regions</b>	<b>13,5</b>	<b>60,1</b>	<b>73,6</b>	<b>107,0</b>	<b>552,0</b>	<b>659,0</b>
<b>Total production in Ukraine</b>	<b>67,0</b>	<b>158,5</b>	<b>225,5</b>	<b>333,8</b>	<b>1 714,3</b>	<b>2 048,0</b>
<b>Share of 7 regions in Ukraine production</b>	<b>20%</b>	<b>38%</b>	<b>33%</b>	<b>32%</b>	<b>32%</b>	<b>32%</b>



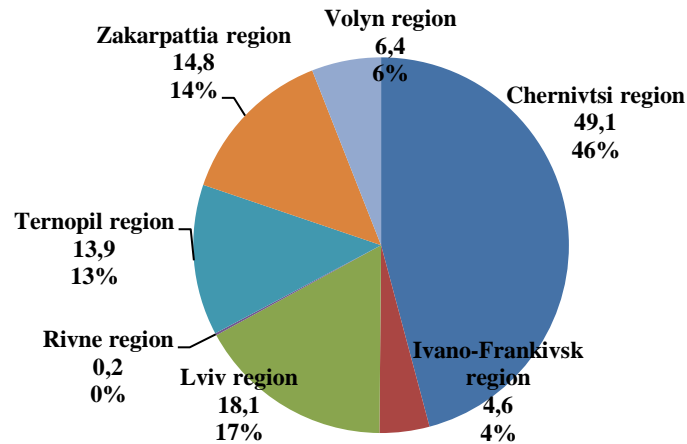
**Fig. 2.7. Regional breakdown of fruits and berries production, thsd. ha**



**Fig. 2.8. Regional breakdown of fruits and berries plantations area, thsd. tons**

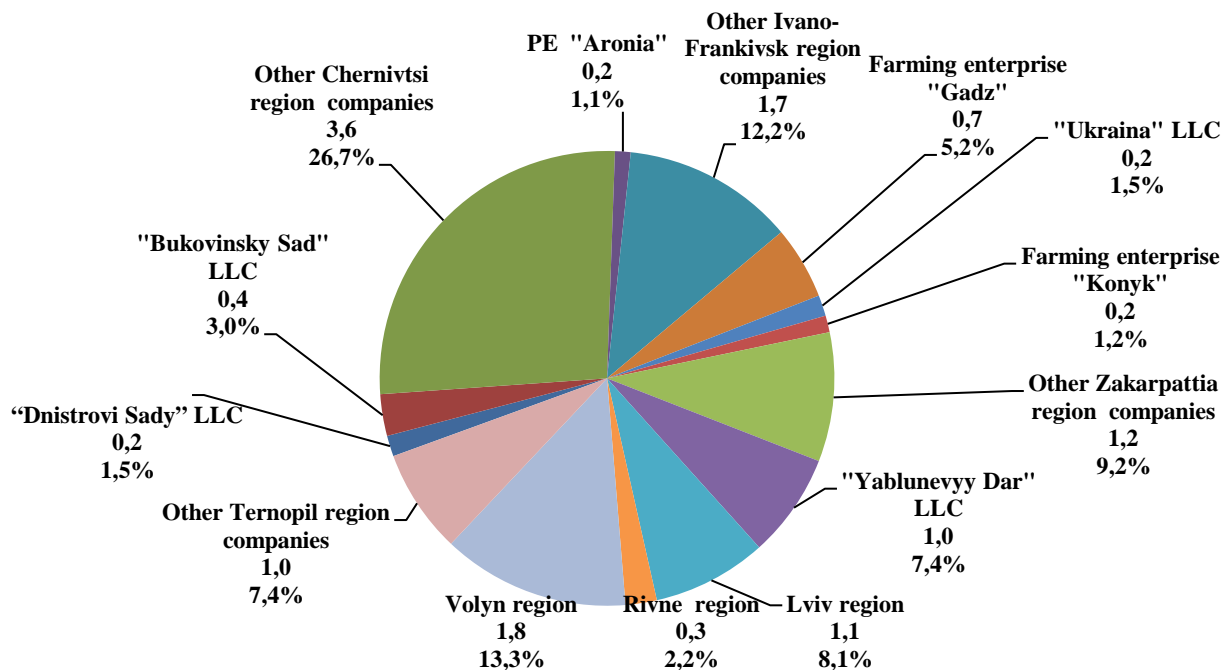
It should be noted that an overwhelming majority of fruits and berries grown by households are subsequently consumed for their own needs and not delivered into the market. As a result, marketable products are mostly fruits grown by agricultural enterprises.

Chernivtsi region dominates in fruits and berries production by agricultural enterprises (31% of plantations area and 46% of production).



**Fig. 2.9. Regional breakdown of fruits and berries production, thsd. tons**

The largest areas of plantations have "Yablunevyy Dar" LLC (about 1000 ha), Farming enterprise "Gadz" (700 ha), "Bukovinsky Sad" LLC (400 ha), "Dnistrovi Sady" LLC (200 ha), "Ukraina" LLC (200 ha), Farming enterprise "Konyk" (160 ha), and PE "Aronia" (150 ha). These companies account for about 20% of all plantations area in the surveyed regions.



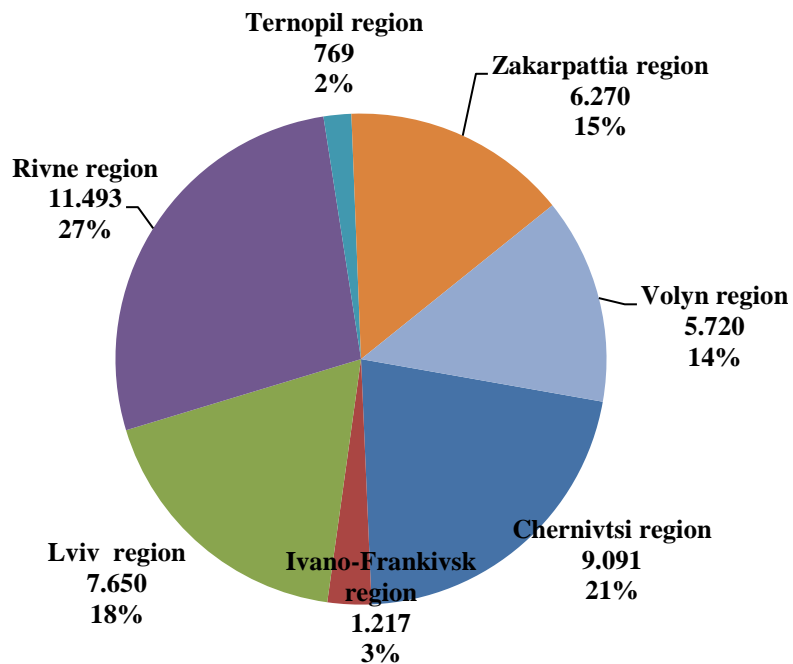
**Fig. 2.10. Regional breakdown of fruits and berries agricultural enterprises plantations area by main producers, thsd. ha**

**Export**

In 2016, the volume of fruits and berries exports in Western Ukrainian regions amounted to about USD 42 million, of which almost 49% was generated by Rivne region (USD 11.5 million) and Chernivtsi region (USD 9.1 million).

**Table 2.5. The volume of export of fruits and berries in 2016, thousand USD**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Edible fruit and nuts	9 091	1 217	7 650	11 493	769	6 270	5 720	42 210



**Fig. 2.11. Regional breakdown of fruits and berries export, thousand USD**

**Leading companies of the sector**

The main production of fruits and berries in the Western Ukrainian regions are Farming enterprise "Konyk", Farming enterprise "Gadz" and "Agrodim Zakhid" LLC.

**Table 2.6. Leading production of fruits and berries companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
22075725	Farming enterprise "Konyk"	ФГ "Коник"	50-100 mln. UAH
37289250	Farming enterprise "Gadz"	ФГ "Гадз"	25-50 mln. UAH
38667319	"Agrodim Zakhid" LLC	ТОВ "Агродім Захід"	less than 50 mln. UAH
37066947	"Dnistrovi Sady" LLC	ТОВ "Дністрові Сади"	25-50 mln. UAH
37580080	"Highberry" LLC	ТОВ "Хайберрі"	less than 50 mln. UAH
33129934	Farming enterprise "Renet"	ФГ "Ренет"	less than 50 mln. UAH
31769327	"Bukovinsky Sad" LLC	ТОВ "Буковинський Сад"	less than 25 mln. UAH

36748715	Farming enterprise "Alstar"	ФГ "Алстар"	less than 25 mln. UAH
35248888	Farming enterprise "Nivalsad"	ФГ "Нівалсад"	less than 25 mln. UAH
33222590	Farming enterprise "Ranet"	ФГ "Ранет"	less than 50 mln. UAH

Regional distribution of the largest companies in the sector is shown in Table 2.7.

**Table 2.7. Top-10 companies of fruits and berries production by region**

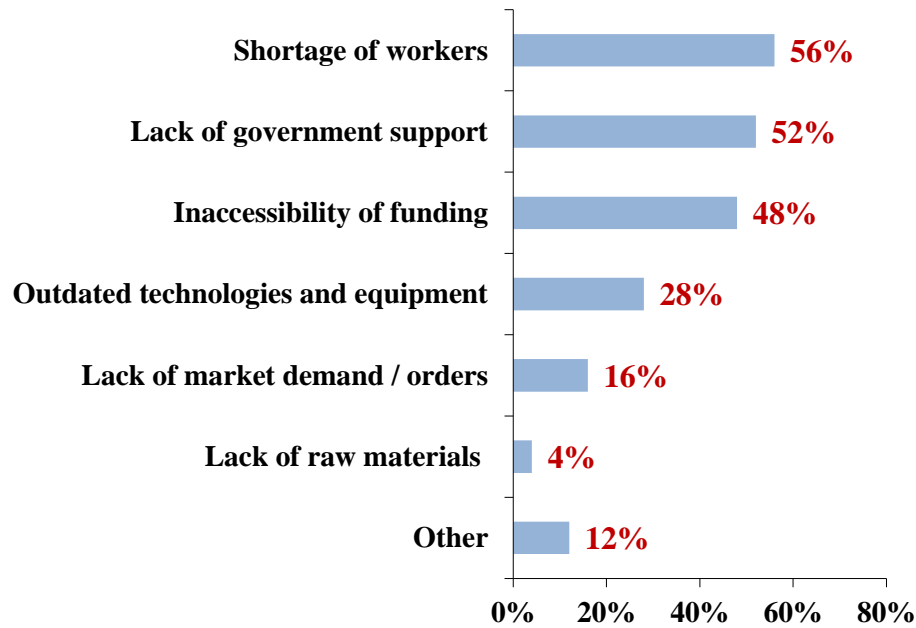
Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	37066947	"Dnistrovi Sady" LLC	ТОВ "Дністрові Сади"	25-50 mln. UAH
	31769327	"Bukovinsky Sad" LLC	ТОВ "Буковинський Сад"	less than 25 mln. UAH
	36748715	Farming enterprise "Alstar"	ФГ "Алстар"	less than 25 mln. UAH
	35248888	Farming enterprise "Nivalsad"	ФГ "Нівалсад"	less than 25 mln. UAH
	34678835	PE "Agricultural Firm Interahrokom "	ПП "Сільськогосподарська Фірма "Інтерагроком"	less than 25 mln. UAH
	30769462	"Dnister" LLC	ТОВ "Дністер"	less than 25 mln. UAH
	33259788	"Agrosad-2005" LLC	ТОВ "Агросад-2005"	less than 25 mln. UAH
	33108967	Farming enterprise "Todosiychuk V I"	ФГ "Тодосійчук В І"	less than 25 mln. UAH
	34847994	Farming enterprise "Chempion Agro"	ФГ "Чемпіон-Агро"	less than 25 mln. UAH
	35125869	PE "Bukovina Agrosvit"	ПП "Буковина Агросвіт"	less than 25 mln. UAH
Ivano-Frankivsk region	30545846	PE "Aronia"	ПП "Аронія"	less than 25 mln. UAH
	38816747	Farming enterprise "Ostrivetsky EcosaD"	ФГ "Острівецький Екосад"	less than 25 mln. UAH
	39003082	Farming enterprise "Fruit Dar"	ФГ "Фруктовий Дар"	less than 25 mln. UAH
	36229777	PE "Price Days"	ПП "Сади Ценяви"	less than 25 mln. UAH
	39391682	Farming enterprise "Sady Maliony"	ФГ "Сади Мальйони"	less than 25 mln. UAH
	40172711	Farming Agriculture Agro-Rozvytok	ФГ "Агро-Розвиток"	less than 25 mln. UAH
	37441893	"Olfruts-Ukraine" LLC	ТОВ "Олфрутс-Україна"	less than 25 mln. UAH
	20566241	"Trading House Rubin-R" LLC	ТОВ "Торговий Дім Рубін-р"	less than 25 mln. UAH
	37794810	"Prikarpattia Fruits" LLC	ТОВ "Фрукти Прикарпаття"	less than 25 mln. UAH
Ternopil region	37289250	Farming enterprise "Gadz"	ФГ "Гадз"	25-50 mln. UAH
	855919	PrJSC "Plodorozsadnyk Skala-Podilsky"	ПрАТ Плодорозсадник "Скала-Подільський"	less than 25 mln. UAH
	38440210	"Ekofruts" LLC	ТОВ "Екофрутс"	less than 25 mln. UAH
	35039267	PE "Demeter Plus"	ПП "Деметра Плюс"	less than 25 mln. UAH
	38245277	Farming enterprise "Terberi"	ФГ "Тербері"	less than 25 mln. UAH
	32290979	Farming enterprise "Lotos"	ФГ "Лотос"	less than 25 mln. UAH
	38908196	Farming enterprise "Organic Berry"	ФГ "Органік Беррі"	less than 25 mln. UAH
	14038650	Small PE "Libyd"	Мале ПП "Либідь"	less than 25 mln. UAH
	21133627	Farming enterprise "Suniachne"	Селянське (Фермерське) Господарство "Сонячне"	less than 25 mln. UAH
	32021634	PE "Garden"	ПП "Сад"	less than 25 mln. UAH
Lviv region	38667319	"Agrodim Zakhid" LLC	ТОВ "Агродім Захід"	less than 50 mln. UAH
	38429416	"Galych Ekofrukt" LLC	ТОВ "Галич Екофрукт"	less than 50 mln. UAH
	33476964	"Agro Fruit Byshkiv" LLC	ТОВ "Агро Фрукта Бішків"	less than 50 mln. UAH
	39192457	"Odeo" LLC	ТОВ "Одео"	less than 50 mln. UAH
	37288880	Farming enterprise "Nova Mriya"	ФГ "Нова Мрія"	less than 50 mln. UAH
	38970835	"Vertograd LTD." LLC	ТОВ "Вертоград ЛТД"	less than 50 mln. UAH
	36763733	Farming enterprise "Arsad"	ФГ "Арсад"	less than 50 mln. UAH
	38224943	Farming enterprise "Elitfrukt"	ФГ "Елітфрукт"	less than 50 mln. UAH
	37791955	Farming enterprise	ФГ "Галекосад"	less than 50 mln. UAH



Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
		"Halekosad"		
	36763581	Farming enterprise "Grin Garden"	ФГ "Грін Гарден"	less than 50 mln. UAH
Rivne region	39812615	"Invest Osnova" LLC	ТОВ "Інвест Основа"	less than 50 mln. UAH
	36788805	Farming enterprise "Malynove"	ФГ "Малинове"	less than 50 mln. UAH
	30716913	Farming enterprise "Rosavka"	ФГ "Росавка"	less than 50 mln. UAH
	39226145	"UA-Zolote Yabluko" LLC	ТОВ "УА-Золоте Яблуко"	less than 50 mln. UAH
	39225487	"UA-Berry" LLC	ТОВ "УА-Беррі"	less than 50 mln. UAH
	38977152	"Agrofirma" Velesovo " LLC	ТОВ "Агрофірма "Велесово"	less than 50 mln. UAH
Zakarpattia region	22075725	Farming enterprise "Konyk"	ФГ "Коник"	50-100 mln. UAH
	33129934	Farming enterprise "Renet"	ФГ "Ренет"	less than 50 mln. UAH
	33222590	Farming enterprise "Ranet"	ФГ "Ранет"	less than 50 mln. UAH
	37520241	"Zakarpal-AgrO" LLC	ТОВ "Закарпат-Агро"	less than 50 mln. UAH
	37940862	"Yab-Loko" LLC	ТОВ "Яб-Локо"	less than 50 mln. UAH
	32452722	Farming enterprise "Vella"	ФГ "Велла"	less than 50 mln. UAH
	38207729	"Yablogrup Transcarpathia" LLC	ТОВ "Яблогруп Закарпаття"	less than 50 mln. UAH
	36990556	Farming enterprise "Kuzna Zeikan"	ФГ "Кузня Зейкан"	less than 50 mln. UAH
	38222087	Farming enterprise "Nadia Garden"	ФГ "Надія Сад"	less than 50 mln. UAH
	38466510	Farming enterprise "Perfect"	ФГ "Перфект"	less than 50 mln. UAH
Volyn region	37580080	"Highberry" LLC	ТОВ "Хайберрі"	less than 50 mln. UAH
	32701715	Farming enterprise "Sad"	ФГ "Сад"	less than 50 mln. UAH
	33417034	"Zolotiy Nektar" LLC	ТОВ "Золотий Нектар"	less than 50 mln. UAH
	37849905	"Eurofrotgrup" LLC	ТОВ "Єврофрутгруп"	less than 50 mln. UAH
	36407495	Farming enterprise "Rating Garden"	ФГ "Рідний Сад"	less than 50 mln. UAH
	39264311	"Tarumshi" LLC	ТОВ "Тарумши"	less than 50 mln. UAH
	37580227	"Dary Volyni" LLC	ТОВ "Дари Волині"	less than 50 mln. UAH
	37669645	"Ukraine-Gold Sad" LLC	ТОВ "Україна-Голд Сад"	less than 50 mln. UAH
	34969501	"Spectrum Agro" LLC	ТОВ "Спектрум Агро"	less than 50 mln. UAH
	38100999	Farming enterprise "Veles-M"	ФГ "Велес-М"	less than 50 mln. UAH

### **Key obstacles observed in the sector**

While identifying main obstacles for the development of fruits and berries production in the Western Ukrainian regions 33 companies were contacted, of which 25 (76%) agreed to participate in the survey, and 8 (24%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 2.12. The rating of main obstacles for the development of fruits and berries production industry in Western Ukrainian regions**

The Ukrainian fruits and berries production sector faces some important challenges. The interviewed companies stressed the following key obstacles to growth: shortage of workers (56%), lack of government support (52%) and inaccessibility of funding (48%)

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

52% of companies indicated a lack of government support to the sector. First of all, representatives of the sector highlighted that horticultural companies were negatively affected by the abolition of the special regime for VAT refund in 2017. As a result, the profitability of the business declined, and the rate of reinvestment in the business decreased. At the same time, farmers who continue to invest in horticulture, felt a shortage of capital and are now turning to banks for loans.

Inaccessibility of funding is ranked the third 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.

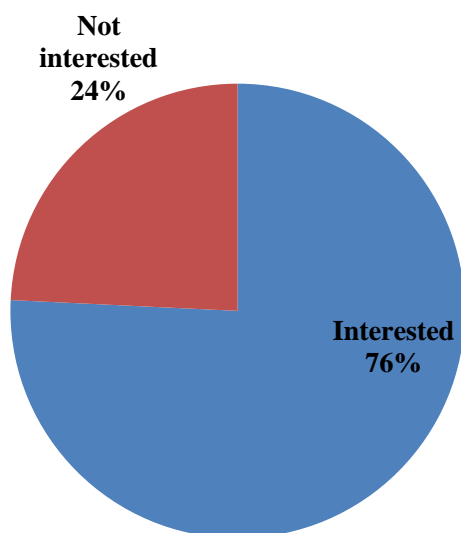
Almost each third company cited as a key obstacle outdated technologies and equipment which is crucial to remain competitive in terms of productivity and quality of products. The most urgent issue is a lack of technological equipment, namely: depreciation of the material and technical base, lack of equipment for mechanized harvesting, sorting and calibration machines, long-term storage and processing equipment of fruits and berries. All this leads to poor competitiveness of products. For example, at the end of 2015, a total number of machines for fruits and berries

harvesting in Ukrainian agricultural enterprises was 38 units. This means that an absolute majority of enterprises harvest the yield manually, while doing the initial sorting. According to the branch association "Ukrsadprom", only every third enterprise has the required equipment for 100%. Only 30% of fruits and berries producers in Ukraine use sorting lines in the production process.

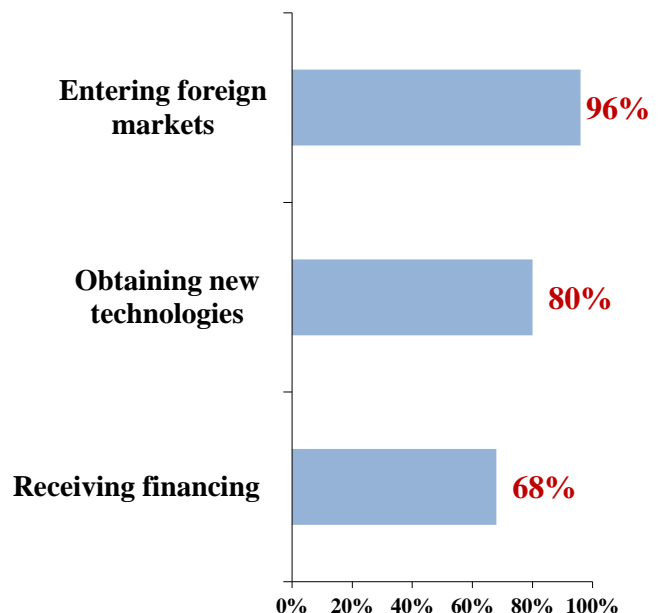
There is also a problem with a lack of storage facilities, especially with new equipment and technology level. Given the short shelf life of fruits and berries, availability of refrigeration capacity is a key factor for the development of this segment in Ukraine. The lack of sufficiently refrigerators 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).

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 76% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (96%), obtaining new technologies (80%) and receiving financing (68%).



**Fig. 2.13. The interest of production of fruits and berries enterprises in cooperation with the Dutch business**



**Fig. 2.14. Main areas of potential cooperation with the Dutch business in production of fruits and berries, %**

## 2.2. Production of vegetables and mushrooms

### General overview of the sector

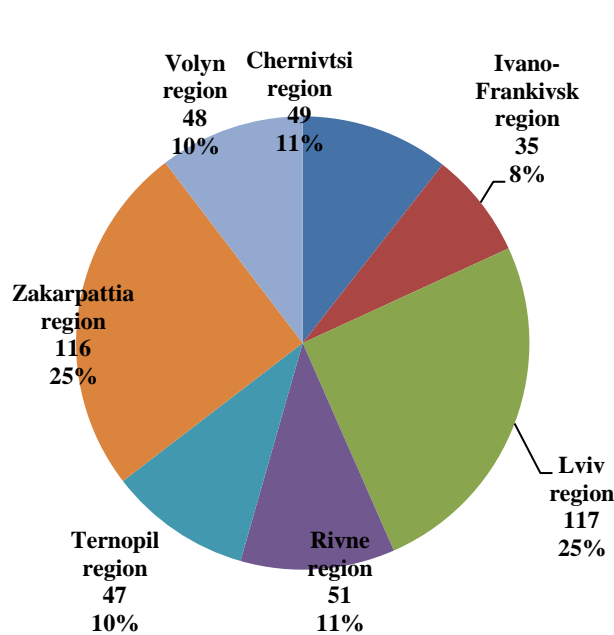
In Western Ukrainian regions, there are 463 enterprises producing vegetables and mushrooms, of which 172 are legal entities (37%), and 291 - individual entrepreneurs (63%).

The largest number of companies operates in Lviv region (117 units or 25%), and the least - in Ivano-Frankivsk region (35 units or 8%).

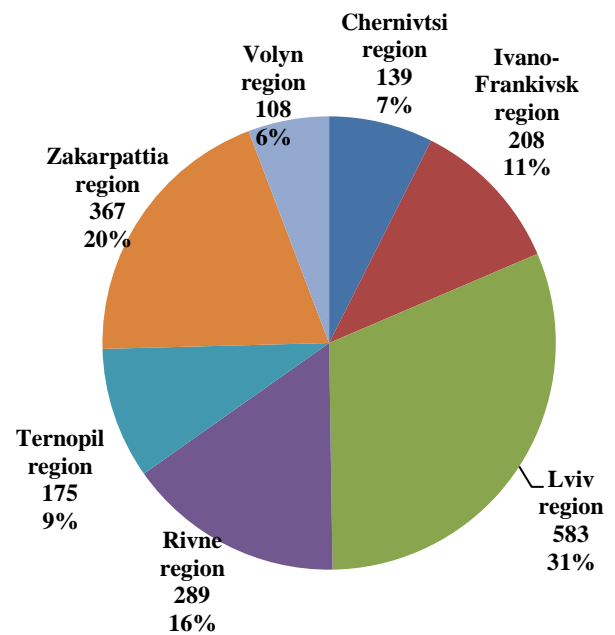
The sector is employing 1 869 full-time employees, including 1 440 in legal entities (77%), and 429 are employed by individual entrepreneurs (about 23%). The sector's leader by the number of employees is Lviv region (583 people or almost 31%), while the smallest employment in the sector is in Volyn region (108 people or almost 6%).

**Table 2.8. Number of functioning enterprises and employment in production of vegetables and mushrooms in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	19	30	49	46	93	139
Ivano-Frankivsk region	18	17	35	177	31	208
Lviv region	51	66	117	500	83	583
Rivne region	18	33	51	243	46	289
Ternopil region	13	34	47	121	54	175
Zakarpattia region	30	86	116	271	96	367
Volyn region	23	25	48	82	26	108
<b>Total West Ukraine regions</b>	<b>172</b>	<b>291</b>	<b>463</b>	<b>1 440</b>	<b>429</b>	<b>1 869</b>



**Fig. 2.15. Breakdown of production of vegetables and mushrooms enterprises by regions, units**



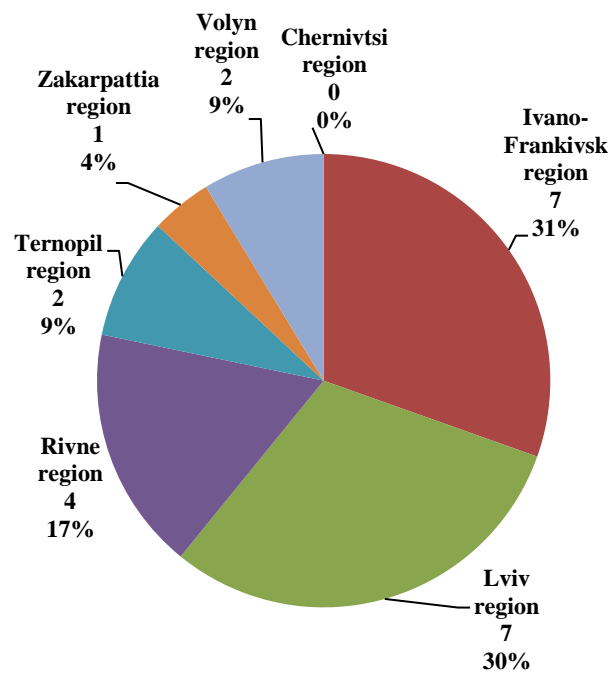
**Fig. 2.16. Regional employment structure in production of vegetables and mushrooms, people**

In Western Ukrainian regions, there are 23 enterprises producing greenhouse vegetables. The largest number of companies operates in Lviv region (7 units or 30%) and Ivano-Frankivsk region (7 units or 30%), and the least - in Zakarpattia region (1 unit or 4%).

At the same time, there are no producers of greenhouse vegetables in the Chernivtsi region.

**Table 2.9. Number of functioning enterprises in production of greenhouse vegetables in 2016**

Region	Number of companies
Chernivtsi region	–
Ivano-Frankivsk region	7
Lviv region	7
Rivne region	4
Ternopil region	2
Zakarpattia region	1
Volyn region	2
<b>Total West Ukraine regions</b>	<b>23</b>



**Fig. 2.17. Breakdown of production of greenhouse vegetables enterprises by regions, units**

## Sales

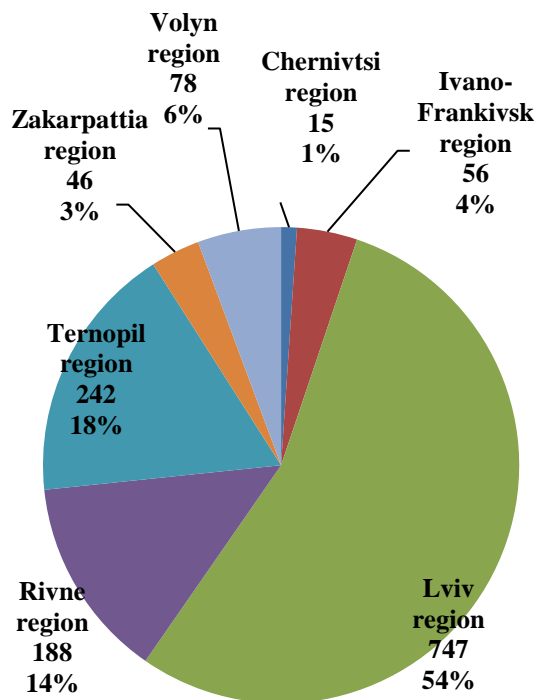
In 2016, sales volume of vegetables and mushrooms enterprises amounted to about UAH 1 372 million, of which UAH 1 324 million were generated by legal entities (97%), and the rest UAH 48 million – by individual entrepreneurs (about 3%).

In the regional structure, the leaders are Lviv region (UAH 747 million or 54% of sales), Ternopil region (UAH 242 million or 18% - big greenhouse vegetable producer "Edem-F" LLC, which generate the main part of sales) and Rivne region (UAH 188 million or 14%). Together, these regions account for more than 86% of vegetables and mushrooms sales among Western Ukrainian regions.

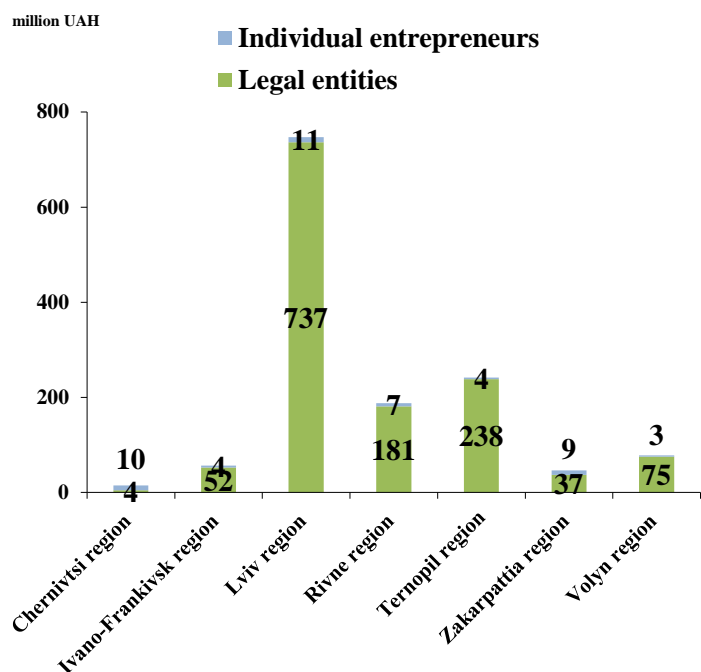
According to the results of companies' survey, the average level of sales through retail networks in vegetables and mushrooms production is about 45%.

**Table 2.10. The volume of sales of production of vegetables and mushrooms enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	4,2	10,4	14,6
Ivano-Frankivsk region	52,3	4,0	56,3
Lviv region	736,7	10,6	747,3
Rivne region	180,9	7,1	188,0
Ternopil region	238,2	3,6	241,8
Zakarpattia region	36,7	9,3	46,0
Volyn region	75,0	2,7	77,8
<b>Total West Ukraine regions</b>	<b>1 324,0</b>	<b>47,8</b>	<b>1 371,7</b>



**Fig. 2.18. Regional sales of production of vegetables and mushrooms products, million UAH**



**Fig. 2.19. Regional sales of production of vegetables and mushrooms products by type of business entity, million UAH**

**Production**

In 2014-2106, volumes of vegetable production in open fields and greenhouses in the seven studied regions amounted to 1.89-1.96 mln. tons / year, which is ~20.5% of the total Ukrainian production (Tab. 2.11).

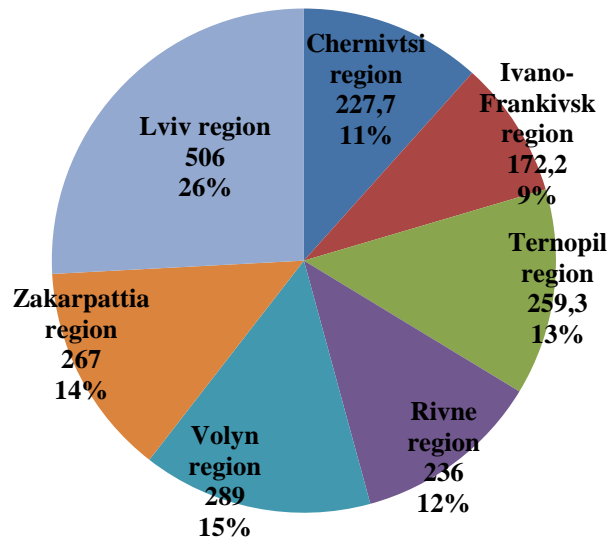
The bulk of the vegetables is grown in households (~ 85%), mainly for their own consumption and sales at the fresh markets. Production volumes (including for processing) total amount of 263-277 thousand tons / year. The largest production of marketable vegetables is in Lviv region (~70 thousand tons / year).

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

**Table 2.11. Volumes of vegetables production in open fields and greenhouses in 2014-2016, thousand tons**

<b>Region</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Chernivtsi, total</b>	<b>232,2</b>	<b>222,3</b>	<b>227,7</b>
agricultural enterprises, farms, private entrepreneurs	32,7	30	33
households	199,5	192,3	194,7
<b>Ivano-Frankivsk, total</b>	<b>166,7</b>	<b>169,8</b>	<b>172,2</b>
agricultural enterprises, farms, private entrepreneurs	22,9	22,7	24,6
households	143,8	147,1	147,6
<b>Ternopil, total</b>	<b>270,8</b>	<b>255,4</b>	<b>259,3</b>
agricultural enterprises, farms, private entrepreneurs	38,1	35,6	36,5
households	232,7	219,8	222,8
<b>Rivne, total</b>	<b>255,5</b>	<b>213,6</b>	<b>236,2</b>
agricultural enterprises, farms, private entrepreneurs	35,16	29,9	33,2
households	220,34	183,7	203
<b>Volyn, total</b>	<b>282,1</b>	<b>276,4</b>	<b>288,7</b>
agricultural enterprises, farms, private entrepreneurs	39,4	38,5	40,2
households	242,7	237,9	248,5
<b>Zakarpattia, total</b>	<b>289</b>	<b>267,2</b>	<b>267,2</b>
agricultural enterprises, farms, private entrepreneurs	40,1	37,1	37,9
households	248,9	230,1	229,3
<b>Lviv, total</b>	<b>456,7</b>	<b>483,5</b>	<b>505,7</b>
agricultural enterprises, farms, private entrepreneurs	68,5	68,9	71,4
households	388,2	414,6	434,3
<b>Total Ukraine</b>	<b>9 637,50</b>	<b>9 214,00</b>	<b>9 414,50</b>
agricultural enterprises, farms, private entrepreneurs	1 340,30	1 281,60	1 322,90
households	8 297,20	7 932,40	8 091,60
<b><i>The share of 7 regions in Ukrainian production, %</i></b>	<b>20,3%</b>	<b>20,5%</b>	<b>20,8%</b>
agricultural enterprises, farms, private entrepreneurs	20,7%	20,5%	20,9%
households	20,2%	20,5%	20,8%

Source: State Statistics Service of Ukraine



**Fig. 2.20. Regional structure of greenhouse and open field vegetables production in 2016, tons**

The volumes of potato production in the studied regions in 2014-2016 amounted to 7.0-7.5 million tons / year, or ~ 33% of the total Ukrainian production (Tab. 2.11).

The bulk of potatoes are grown in households (> 95%), mainly for own consumption and sales at the markets in fresh form. The volume of commercial potato cultivation in three regions is only 175-200 thousand tons / year. The largest production of commercial potatoes in the Lviv region (~43 thousand tons / year).

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 2.12. Volumes of potato production in 2014-2016, thousand tons**

Region	2014	2015	2016
<b>Chernivtsi, total</b>	<b>617</b>	<b>586,3</b>	<b>594,7</b>
agricultural enterprises, farms, private entrepreneurs	15,5	14,9	15,1
households	601,5	571,4	579,6
<b>Ivano-Frankivsk, total</b>	<b>915,3</b>	<b>942,5</b>	<b>975</b>
agricultural enterprises, farms, private entrepreneurs	28,8	19,4	20,8
households	886,5	923,1	954,2
<b>Ternopil, total</b>	<b>1 282,70</b>	<b>927,8</b>	<b>987</b>
agricultural enterprises, farms, private entrepreneurs	41,6	22	21,7
households	1 241,10	905,8	965,3
<b>Rivne, total</b>	<b>1 304,1</b>	<b>1 227,6</b>	<b>1 249,4</b>
agricultural enterprises, farms, private entrepreneurs	32,5	30,6	31,6
households	1 271,6	1 197,0	1 217,8
<b>Volyn, total</b>	<b>1 132,1</b>	<b>1 098,8</b>	<b>1 132,4</b>
agricultural enterprises, farms, private entrepreneurs	28,4	27,9	29,4
households	1 103,7	1 070,9	1 103,0
<b>Zakarpattia, total</b>	<b>610,9</b>	<b>545,8</b>	<b>534,3</b>



Region	2014	2015	2016
agricultural enterprises, farms, private entrepreneurs	15,5	13,4	13,9
households	595,4	532,4	520,4
<b>Lviv, total</b>	<b>1 708,9</b>	<b>1 622,5</b>	<b>1 618,9</b>
agricultural enterprises, farms, private entrepreneurs	42,8	43,6	42,7
households	1 666,1	1 578,9	1 576,2
<b>Total 7 regions</b>	<b>7 571,0</b>	<b>6 951,3</b>	<b>7 091,7</b>
agricultural enterprises, farms, private entrepreneurs	205,1	171,8	175,2
households	7 365,9	6 779,5	6 916,6
<b>Total Ukraine</b>	<b>23 693,4</b>	<b>20 839,3</b>	<b>21 750,3</b>
agricultural enterprises, farms, private entrepreneurs	<b>758,9</b>	<b>456,0</b>	<b>468,2</b>
households	<b>22 934,5</b>	<b>20 383,3</b>	<b>21 282,1</b>
<b>The share of 7 regions in Ukrainian production, %</b>	<b>32%</b>	<b>33%</b>	<b>33%</b>
agricultural enterprises, farms, private entrepreneurs	27%	38%	37%
households	32%	33%	32%

Source: State Statistics Service of Ukraine

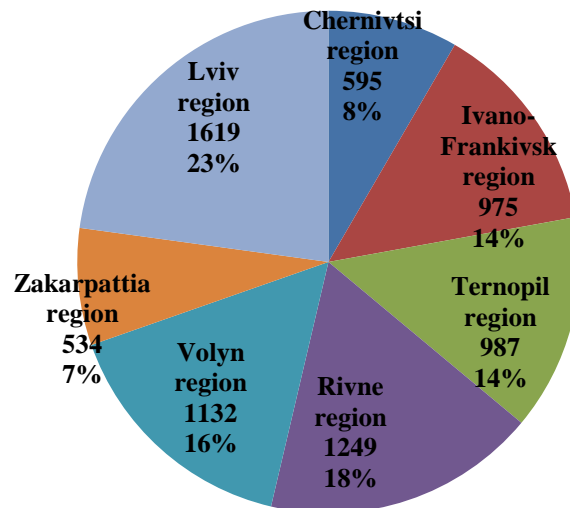


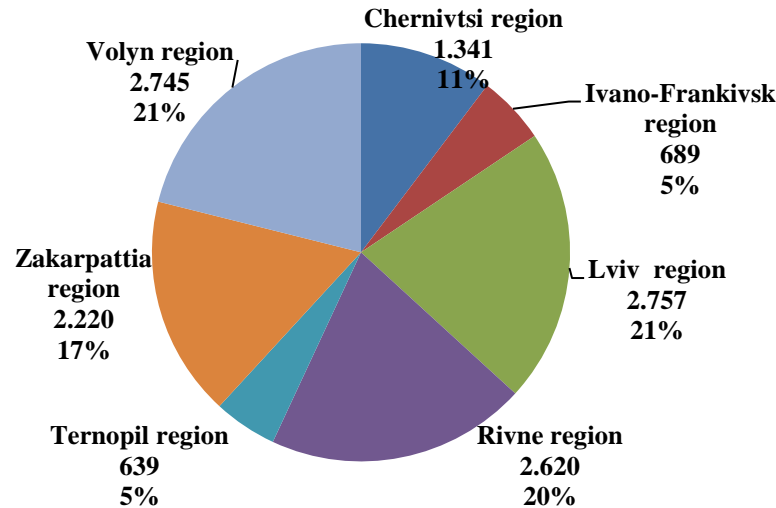
Fig. 2.21. Regional structure of potato production in 2016, thousand tons

### Export

In 2016, the volume of vegetables and mushrooms exports in Western Ukrainian regions amounted to about USD 13 million, of which almost 62% was generated by Lviv region (USD 2.8 million), Volyn region (USD 2.7 million) and Rivne region (USD 2.6 million).

**Table 2.13. The volume of vegetables and mushrooms export in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Edible vegetables and certain roots and tubers	1 341	689	2 757	2 620	639	2 220	2 745	13 013

**Fig. 2.22. Regional breakdown of vegetables and mushrooms export, thousand USD****Leading companies of the sector**

The main production of vegetables and mushrooms in the Western Ukrainian regions are "Edem-F" LLC, Soteko" LLC and "Agro-Concern LLC".

**Table 2.14. Leading vegetables and mushrooms production companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
37888305	"Edem-F" LLC	ТОВ "Едем-Ф"	50-100 mln. UAH
34105587	"Soteko" LLC	ТОВ "Сотеко"	less than 50 mln. UAH
32168276	"Agro-Concern LLC "	ТОВ "Агроконцерн "	less than 50 mln. UAH
34219442	"Rio Shampington" LLC	ТОВ "Ріо Шампінйон"	less than 50 mln. UAH
3046468	Privately-owned Agricultural Enterprise "Dolyna Hothouse and Vegetable Combine"	Приватно-Орендне Сільськогосподарське Підприємство "Долинський теплично-овочевий комбінат"	25-50 mln. UAH
32291066	"Ecotechnology" LLC	ТОВ "Екотехнологія"	25-50 mln. UAH
38875496	"Dobry Urozhai" LLC	ТОВ "Добрий Урожай"	less than 50 mln. UAH
2777916	"Stryteplysia" LLC	ТОВ "Стрийтеплиця"	less than 50 mln. UAH
32171027	"IZA-B.A.T.E." LLC	ТОВ "ІЗА-Б.А.Т.Е."	less than 50 mln. UAH
22603087	Private small enterprise "Impulse"	Приватне мале підприємство "Імпульс"	less than 50 mln. UAH

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

**Table 2.15. Top-10 companies-producers of vegetables and mushrooms by region**

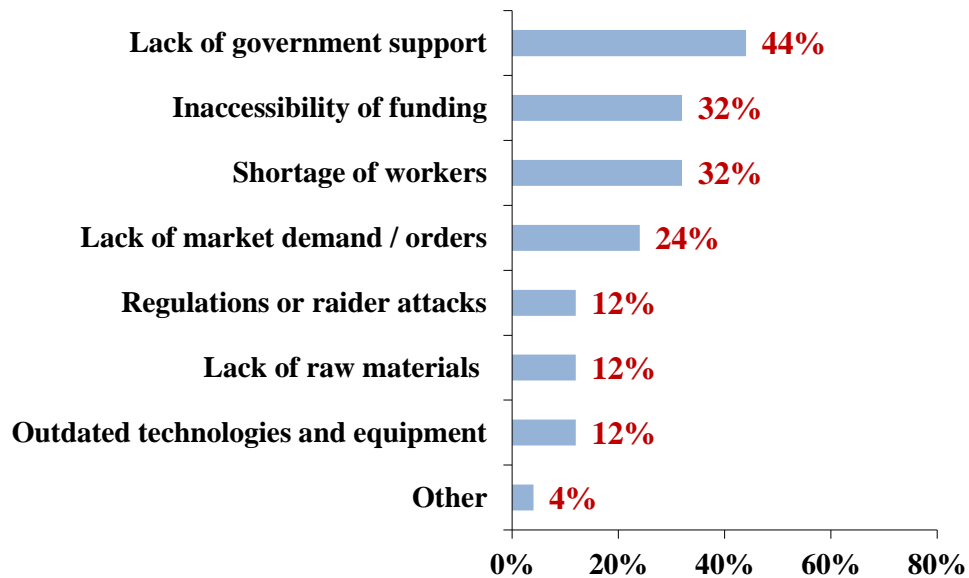
Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	38744109	PE "Starmax"	ПП "Стармакс"	less than 25 mln. UAH
	31999376	Farming enterprise "Nasha Nyva"	Селянське (Фермерське) Господарство "Наша Нива"	less than 25 mln. UAH
	30911285	Private Agricultural Enterprise "Victoria"	Приватне Сільськогосподарське Підприємство "Вікторія"	less than 25 mln. UAH
	34091064	Farming enterprise "Perlina Grubna"	ФГ "Перлина Грубна"	less than 25 mln. UAH
	36300367	Farming enterprise "Elva-Plant"	ФГ "Елва-Плант"	less than 25 mln. UAH
	31494688	Farming enterprise Seliansky / Farmers / Households "DIK"	ФГ Селянське / Фермерське/ Господарство "ДІК"	less than 25 mln. UAH
	31595495	"Agroservis Complex" LLC	ТОВ "Комплекс Агросервіс"	less than 25 mln. UAH
	35883771	Farming enterprise "Yuriy & Yuriy"	ФГ "Юрій & Юрій"	less than 25 mln. UAH
	36751546	Farming enterprise "Zlahoda-TMI"	ФГ "Злагода-ТМІ"	less than 25 mln. UAH
	21425436	Farming enterprise "Smerichka"	Селянське (Фермерське) Господарство "Смерічка"	less than 25 mln. UAH
Ivano-Frankivsk region	3046468	Privately-owned Agricultural Enterprise "Dolyna Hothouse and Vegetable Combine"	Приватно-Орендне Сільськогосподарське Підприємство "Долинський теплично-овочевий комбінат"	25-50 mln. UAH
	39235626	"Conservatory-Tavrida" LLC	ТОВ "Консерваторія-Тавріда"	less than 25 mln. UAH
	19391173	"KREZ" LLC	ТОВ "КРЕЗ"	less than 25 mln. UAH
	39492227	Farming enterprise of Tomash Teatyana	ФГ Томаш Тетяни Вікторівни	less than 25 mln. UAH
	37077538	Farming enterprise "Barchuk"	ФГ "Барчук"	less than 25 mln. UAH
	22181812	Farming enterprise of Nosal Stepan	ФГ Носаля Степана Ярославовича	less than 25 mln. UAH
	25568983	Farming enterprise Tkachuk Vasyl Stepanovich	ФГ Ткачука Василя Степановича	less than 25 mln. UAH
	38174657	Farming enterprise "Agroric"	ФГ "Агрорік"	less than 25 mln. UAH
	30943275	Farming enterprise "Galagro"	ФГ "Галагро"	less than 25 mln. UAH
	37831023	Farming enterprise "Barcol"	ФГ "Баркол"	less than 25 mln. UAH
Ternopil region	37888305	"Edem-F" LLC	ТОВ "Едем-Ф"	50-100 mln. UAH
	32291066	"Ecotechnology" LLC	ТОВ "Екотехнологія"	25-50 mln. UAH
	22603087	Private Small Enterprise "Impulse"	ПМП "Імпульс"	less than 25 mln. UAH
	37198441	"Gravina" LLC	ТОВ "Гравіна"	less than 25 mln. UAH
	38725569	Private Agricultural Enterprise "Tandem"	ПСП "Тандем"	less than 25 mln. UAH
	25344054	Farming enterprise "Sunishnyk"	Селянське (Фермерське) Господарство "Соняшник"	less than 25 mln. UAH
	39381716	Farming enterprise "Diodem"	ФГ "Діодем"	less than 25 mln. UAH
	36438193	Farming enterprise "Vicart"	ФГ "Вікарт"	less than 25 mln. UAH
	35993708	"Goroshivske" LLC	ТОВ "Горошівське"	less than 25 mln. UAH
Lviv region	34105587	LLC "Soteko"	ТОВ "Сотеко"	less than 50 mln. UAH
	34219442	LLC "Rio Shampignon"	ТОВ "Ріо Шампінйон"	less than 50 mln. UAH
	2777916	LLC "Stryteplytsia"	ТОВ "Стрийтеплиця"	less than 50 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	37583961	"Galicia Greenery" LLC	ТОВ "Галіція Грінері"	less than 50 mln. UAH
	20783151	Farming enterprise "Nadia"	ФГ "Надія"	less than 50 mln. UAH
	854400	PJSC "Agrofirma" Provesin "	ПАТ "Агрофірма "Провесінь"	less than 50 mln. UAH
	30730310	Farming enterprise "Malinivka"	ФГ "Малинівка"	less than 50 mln. UAH
	33316809	Farming enterprise "Irpus"	ФГ "Ірпус"	less than 50 mln. UAH
	22418361	Farming enterprise "Bugir"	ФГ "Бугір"	less than 50 mln. UAH
	35785613	Farming enterprise "Ovochivnytstvo"	ФГ "Овочівництво"	less than 50 mln. UAH
Rivne region	32168276	"Agro-Concern" LLC	ТОВ " Агроконцерн "	less than 50 mln. UAH
	38875496	"Dobry Yorozhayi" LLC	ТОВ "Добрий Урожай"	less than 50 mln. UAH
	39337295	"Svit Agrodar" LLC	ТОВ "Світ Агродар"	less than 50 mln. UAH
	38426153	Farming enterprise "Dumolko"	ФГ "Думолко"	less than 50 mln. UAH
	22559624	Farming enterprise "Ako"	ФГ "АКО"	less than 50 mln. UAH
	22559110	Farming enterprise "Vizi"	ФГ "ВІЗИ"	less than 50 mln. UAH
	32089163	Private agricultural enterprise "Moroz"	Приватне сільськогосподарське підприємство "Мороз"	less than 50 mln. UAH
	35505310	Farming enterprise "Agropostup"	ФГ "Агропоступ"	less than 50 mln. UAH
	31729022	Farming enterprise "Kompromis"	СФГ "Компроміс"	less than 50 mln. UAH
	34652623	Farming enterprise "Yu Leliukha"	ФГ "Ю Лелюха"	less than 50 mln. UAH
Zakarpattia region	32171027	"IZA-B.A.T.E." LLC	ТОВ "ІЗА-Б.А.Т.Е."	less than 50 mln. UAH
	35705817	Farming enterprise "Premium"	ФГ "Преміум"	less than 50 mln. UAH
	32695986	"Raiduga" LLC	ТОВ "Райдуга"	less than 50 mln. UAH
	37072568	Farming enterprise "Zakarpatshampingion"	ФГ "Закарпатшампійон"	less than 50 mln. UAH
	33379235	Farming enterprise "Myron"	ФГ "Мирон"	less than 50 mln. UAH
	37036268	Farming enterprise "Hust wholesale and retail fruit and vegetable plant "	ФГ "Хустський оптово-роздрібний плодоовочевий комбінат"	less than 50 mln. UAH
	35585045	Separated farmer villas "Farming enterprise" Chervona Gora "	Відокремлена фермерська садиба "ФГ "Червона Гора"	less than 50 mln. UAH
	22086344	PE "Orphey"	ПП "Орфей"	less than 50 mln. UAH
	22094869	Farming enterprise "Gorbatovykh"	ФГ "Горватових"	less than 50 mln. UAH
37957970	Farming enterprise "Lany Zakarpattia "	ФГ "Лани Закарпаття"	less than 50 mln. UAH	
Volyn region	36932976	"Agrofirma" Volodymyrski Sady " LLC	ТОВ "Агрофірма "Володимирські Сади"	less than 50 mln. UAH
	33971588	PE "Novofrost"	ПП "Новофрост"	less than 50 mln. UAH
	36131852	Farming enterprise "Sylne"	ФГ "Сильне"	less than 50 mln. UAH
	33791883	Farming enterprise "Solomia Plus"	ФГ "Соломія Плюс"	less than 50 mln. UAH
	38523945	LLC "Nash Gryb"	ТОВ "Наш Гриб"	less than 50 mln. UAH
	32313330	Farming enterprise "Promin"	СФГ "Промінь"	less than 50 mln. UAH
	37626601	Farming enterprise "Zakhid-Ovoch"	ФГ "Захід-Овоч"	less than 50 mln. UAH
	31572488	Agricultural LLC "Rodyuchist-Agro"	Сільськогосподарське ТОВ "Родючість-Агро"	less than 50 mln. UAH
	38541503	Farming enterprise "Nika-2010"	ФГ "Ніка-2010"	less than 50 mln. UAH
	13367245	Farming enterprise "Sobutsky M. T."	СФГ "Собуцький М. Т."	less than 50 mln. UAH

**Key obstacles observed in the sector**

While identifying main obstacles for the development of vegetables production in the Western Ukrainian regions 30 companies were contacted, of which 25 (83%) agreed to participate in the survey, and 5 (17%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 2.23. The rating of main obstacles for the development of vegetables production industry in Western Ukrainian regions**

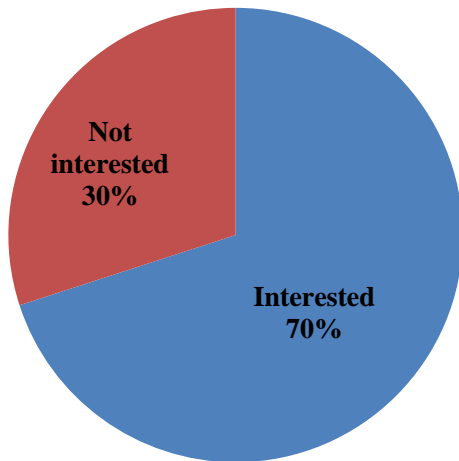
The Ukrainian vegetables production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (44%), shortage of workers (32%) and inaccessibility of funding (32%).

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).

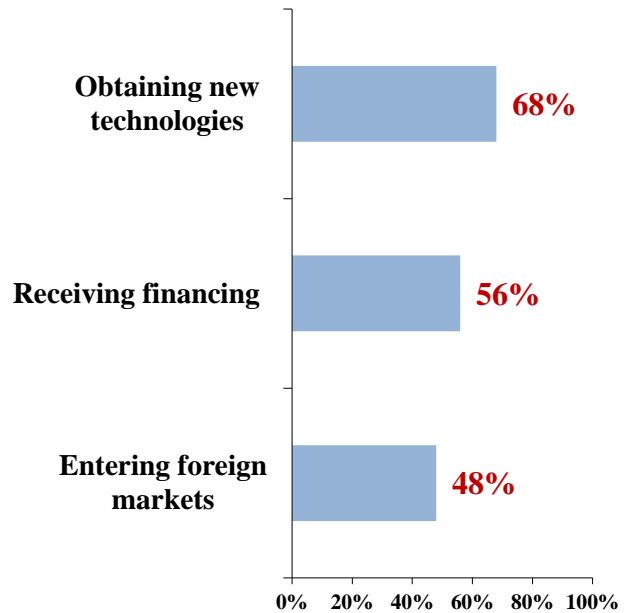
The cultivation of vegetables and potatoes has a noticeable seasonality, and it is difficult for the sector to compete for the labour force with other industries with permanent employment and seasonal jobs in neighboring countries. A possible solution is an introduction of modern high-performance technologies,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

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, about 70% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (68%), receiving financing (56%) and entering foreign markets (48%).



**Fig. 2.24. The interest of vegetables production enterprises in cooperation with the Dutch business**



**Fig. 2.25. Main areas of potential cooperation with the Dutch business in the production of vegetables, %**

### 2.3. Production of milk

#### General overview of the sector

In Western Ukrainian regions, there are 602 enterprises producing milk, of which 562 are legal entities (93%), and 40 - individual entrepreneurs (about 7%).

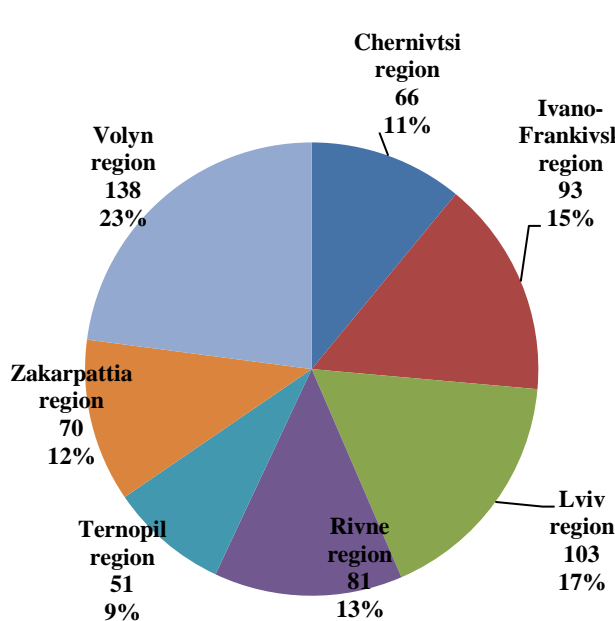
The largest number of companies operates in the Volyn region (138 units or 23%), and the least - in Ternopil region (51 units or 9%).

The sector is employing 6 206 full-time employees, including 6 160 in legal entities (99%), and 46 are employed by individual entrepreneurs (about 1%). The sector's leader by the number of employees is Volyn region (2 153 people or 35%), while the smallest employment in the sector is in Zakarpattia region (36 people or 1%).

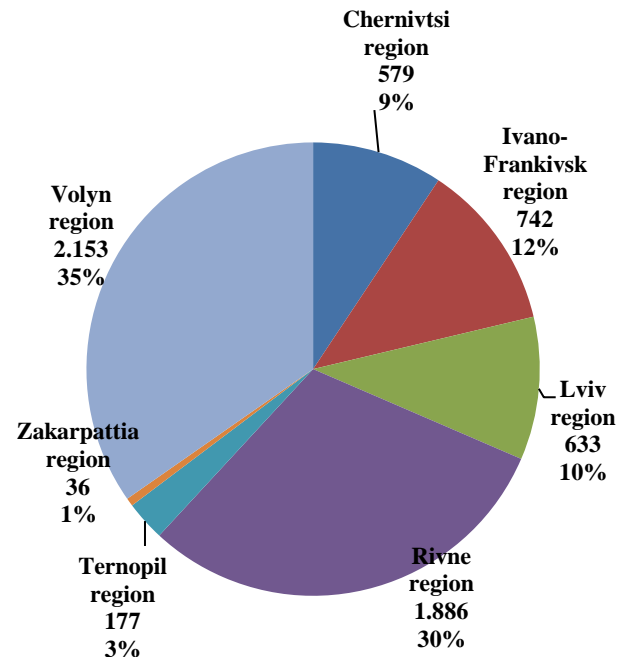
**Table 2.16. Number of functioning enterprises and employment in milk production in 2016 (without private households)**

Region	Number of companies, units			Employment, people*		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	59	7	66	566	13	579
Ivano-Frankivsk region	91	2	93	740	2	742
Lviv region	90	13	103	620	13	633
Rivne region	78	3	81	1 883	3	1 886
Ternopil region	47	4	51	173	4	177
Zakarpattia region	61	9	70	27	9	36
Volyn region	136	2	138	2 151	2	2 153
<b>Total West Ukraine regions</b>	<b>562</b>	<b>40</b>	<b>602</b>	<b>6 160</b>	<b>46</b>	<b>6 206</b>

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



**Fig. 2.26. Breakdown of milk production enterprises by regions, units (without private households)**



**Fig. 2.27. Regional employment structure in milk production, people (without private households)**

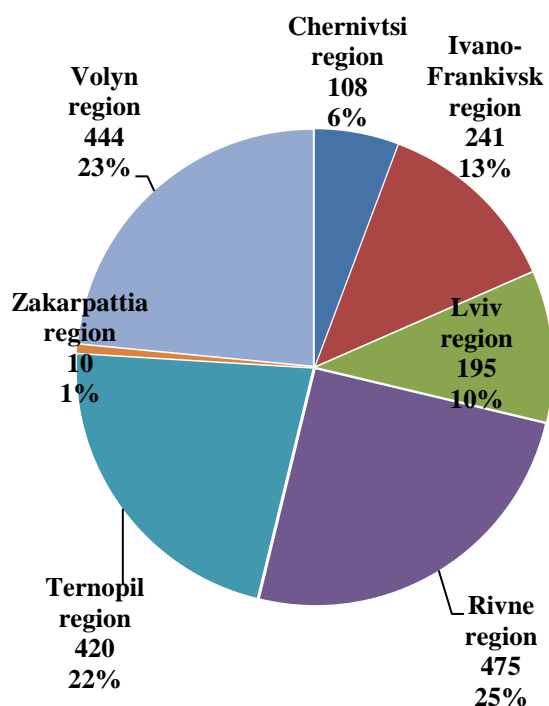
**Sales**

In 2016, sales volume of milk enterprises amounted to about UAH 1 893 million, of which UAH 1 889 million were generated by legal entities (almost 100%), and the rest UAH 4 million – by individual entrepreneurs (about 0.2%).

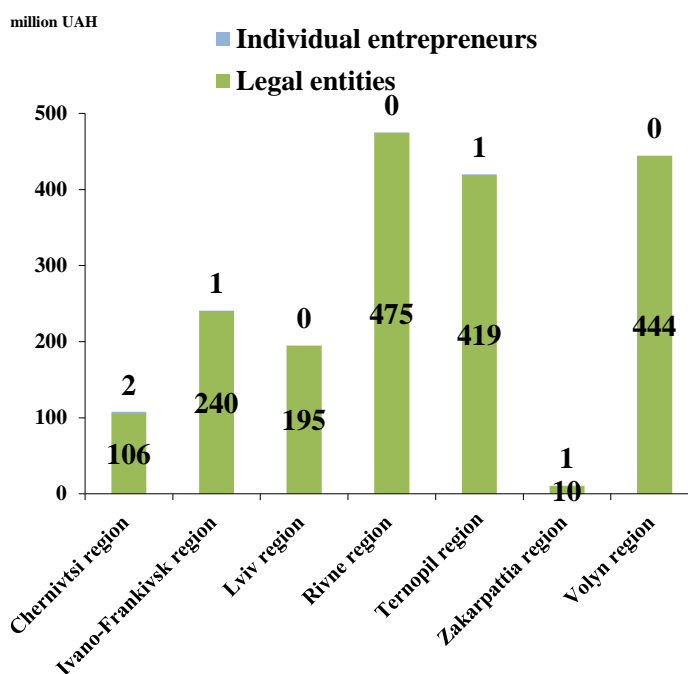
In the regional structure, the leaders are Rivne region (UAH 475 million or 25% of sales), Volyn region (UAH 444 million or 23%) and Ternopil region (UAH 420 million or 22%). Together, these regions account for more than 71% of milk sales among Western Ukrainian regions.

**Table 2.17. The volume of sales of milk production enterprises in 2016, mln. UAH (without private households)**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	106,3	1,7	108,1
Ivano-Frankivsk region	240,2	0,6	240,8
Lviv region	194,5	0,3	194,8
Rivne region	474,6	0,1	474,7
Ternopil region	419,0	0,9	419,9
Zakarpattia region	10,0	0,5	10,4
Volyn region	444,1	0,3	444,4
<b>Total West Ukraine regions</b>	<b>1 888,8</b>	<b>4,3</b>	<b>1 893,1</b>



**Fig. 2.28. Regional sales of milk production, million UAH (without private households)**



**Fig. 2.29. Regional sales of milk production by type of business entity, million UAH (without private households)**



**Production**

The volumes of milk production in the studied regions in 2014-2016 amounted to ~ 3.1 million tons / year, or ~ 28% of the total Ukrainian production (Table 2.18).

The bulk of milk in the area is produced by the households (> 91%), of which only a part is sold to dairies for further processing. Milk due to manual milking has a high bacterial contamination and is unsorted. After the loss of the Russian market (where the quality requirements for dairy products are low), this milk is now used to produce casein, and therefore has a low purchase price. The low purchasing price has led to a decrease in milk production in households in the studied regions by 6% over the period 2014-2016.

High-quality milk is produced by agricultural enterprises (farms), which increased production volumes by 10% during 2014-2016 from 252 thousand tons to 278 thousand tons / year, respectively. The greatest volume of high-quality milk is produced in Volyn and Rivne region. A further increase in the production of high-quality milk requires investment in milking equipment and milk storage in farms.

**Table 2.18. The volumes of milk production in 2014-2016, thousand tons**

<b>Region</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Chernivtsi, total</b>	<b>299,3</b>	<b>294</b>	<b>286,8</b>
agricultural enterprises, farms, private entrepreneurs	18,2	17,4	15,5
households	281,1	276,6	271,3
<b>Ivano-Frankivsk, total</b>	<b>483,3</b>	<b>474</b>	<b>466,8</b>
agricultural enterprises, farms, private entrepreneurs	15,1	16,7	17,5
households	468,2	457,3	449,3
<b>Ternopil, total</b>	<b>480,6</b>	<b>460,7</b>	<b>453,5</b>
agricultural enterprises, farms, private entrepreneurs	52,8	58,8	63,7
households	427,8	401,9	389,8
<b>Rivne, total</b>	<b>458,3</b>	<b>436,8</b>	<b>437,2</b>
agricultural enterprises, farms, private entrepreneurs	59,5	63,2	73,7
households	398,8	373,6	363,5
<b>Volyn, total</b>	<b>459,3</b>	<b>425,2</b>	<b>412,4</b>
agricultural enterprises, farms, private entrepreneurs	76,2	74,9	77,9
households	383,1	350,3	334,5
<b>Zakarpattia, total</b>	<b>409,6</b>	<b>358,1</b>	<b>320,4</b>
agricultural enterprises, farms, private entrepreneurs	4,9	3,5	3,8
households	404,7	354,6	316,6
<b>Lviv, total</b>	<b>601</b>	<b>571,2</b>	<b>543,2</b>
agricultural enterprises, farms, private entrepreneurs	24,9	25,6	26,2
households	576,1	545,6	517
<b>Total 7 regions</b>	<b>3 191,4</b>	<b>3 020,0</b>	<b>2 920,3</b>
agricultural enterprises, farms, private entrepreneurs	251,6	260,1	278,3
households	2 939,8	2 759,9	2 642,0
<b>Total Ukraine</b>	<b>11 132,80</b>	<b>10 615,40</b>	<b>10 381,50</b>
agricultural enterprises, farms, private entrepreneurs	2 647,50	2 669,20	2 705,60

Region	2014	2015	2016
households	8 485,30	7 946,20	7 675,90
<b>The share of 7 regions in Ukrainian production, %</b>	<b>28,7%</b>	<b>28,4%</b>	<b>28,1%</b>
agricultural enterprises, farms, private entrepreneurs	9,5%	9,7%	10,3%
households	34,6%	34,7%	34,4%

Source: State Statistics Service of Ukraine

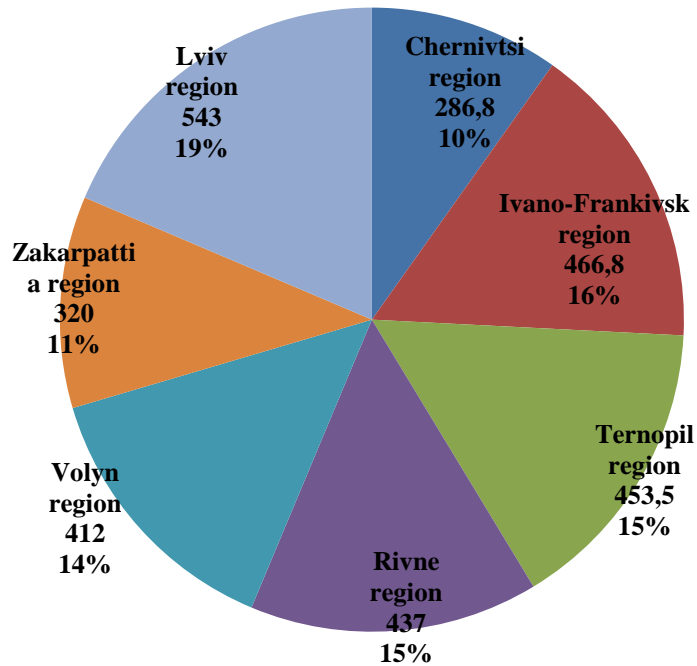


Fig. 2.30. Regional structure of milk production in 2016, thousand tons

### 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 Western Ukrainian regions are Private enterprise "Agro-Express-Service, "Buschachagrochlibprom" LLC and Volovikova Agricultural Enterprise LLC.

**Table 2.19. Leading milk production companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
30132761	Private enterprise "Agro-Express-Service"	ПП "Агро-Експрес-Сервіс"	more than 100 mln. UAH
952829	"Buschachagrochlibprom" LLC	ТОВ "Бучачагрохлібпром"	more than 100 mln. UAH
3775871	Volovikova Agricultural Enterprise LLC	ТОВ СГП "Імені Воловікова"	more than 100 mln. UAH
3782954	Private Agricultural Enterprise Agrofirma "Gorin"	ПСП Агрофірма "Горинь"	more than 100 mln. UAH
3735110	"Progress" LLC	ТОВ "Прогрес"	50-100 mln. UAH
35642878	"CJSC Myrne" LLC	ТОВ "АТЗТ Мирне"	50-100 mln. UAH
35603085	"Molochni Riky" LLC	ТОВ "Молочні Ріки"	less than 50 mln. UAH
3735435	Shevchenko Private agricultural enterprise	Приватно-орендне сільськогосподарське підприємство ІМ. Шевченка	50-100 mln. UAH
3737284	Agricultural PE "Druzhba"	Сільськогосподарське ПП "Дружба"	more than 100 mln. UAH
3737422	Agricultural PE "Rat"	Сільськогосподарське ПП "Рать"	50-100 mln. UAH

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

**Table 2.20. Top-10 milk production companies by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	35453632	"Agrofirma Suvorova" LLC	ТОВ "Агрофірма Імені Суворова"	50-100 mln. UAH
	35642878	"CJSC Myrne" LLC	ТОВ "АТЗТ Мирне"	50-100 mln. UAH
	30485740	"Valiavske" LLC	ТОВ "Валявське"	less than 50 mln. UAH
	3801675	Agricultural Production Cooperative "Zorya"	СВПК "Зоря"	less than 50 mln. UAH
	710016	"Bukovynaplemservis" ALC	ТДВ "Буковинаплемсервіс"	less than 50 mln. UAH
	3801226	Agricultural Production Private Cooperative "Peremoha"	СВПК "Перемога"	less than 50 mln. UAH
	21417891	Agricultural Company "Agrophirma" Vilia" ALC	Сільськогосподарське ТОВ "Агрофірма" Вілія"	less than 50 mln. UAH
	36752260	Agricultural LLC "Svizhenka-Milk"	Сільськогосподарське ТОВ "Свіженька-Мілк"	less than 50 mln. UAH
	3800965	Agricultural LLC "Ukraine"	Сільськогосподарське ТОВ "Україна"	less than 50 mln. UAH
	37652275	Farming enterprise "Vlasta Lyuks"	ФГ "Власта Люкс"	less than 50 mln. UAH
Ivano-Frankivsk region	20539936	Subsidiary enterprise "Yamnytsia" OJSC "Ivano-Frankivskcement"	ДП "Ямниця" ВАТ "Івано-Франківськцемент"	more than 100 mln. UAH
	35173399	"Agrarna Perspektyva" LLC	ТОВ "Аграрна Перспектива"	more than 100 mln. UAH
	3752953	Private Farming Enterprise "Potochysche"	Приватне ФГ "Поточище"	less than 50 mln. UAH
	3752445	Agricultural Company "Uyizd"	Сільськогосподарське ТОВ "Уїзд"	less than 50 mln. UAH
	2126047	PAE "Ridna Zemlia"	ПСП "Рідна Земля"	less than 50 mln. UAH

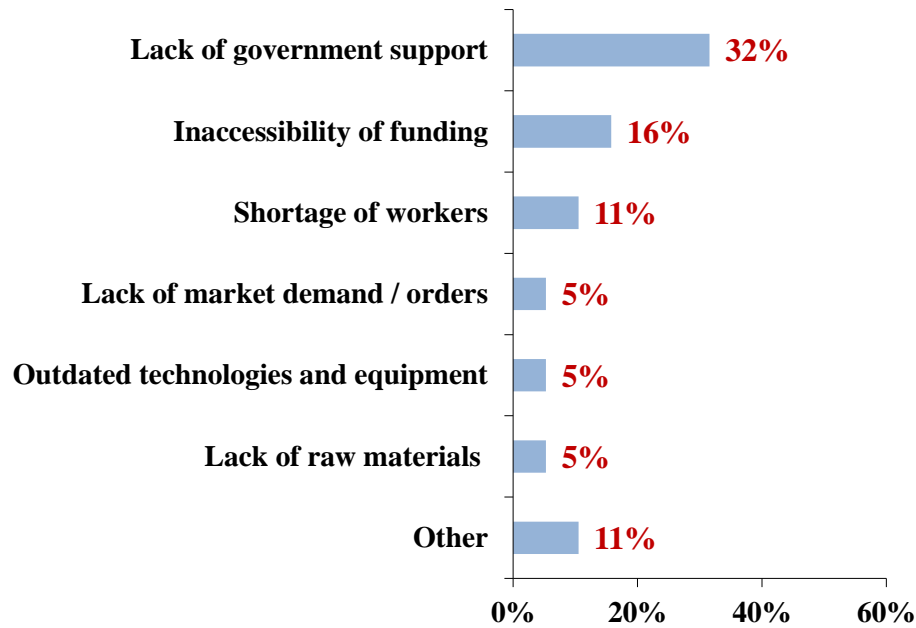
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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	37112925	"Agroindustrial Firm" Rodnik Plus " LLC	ТОВ "Агропромислова Фірма "Родник Плюс"	less than 50 mln. UAH
	37042753	Private enterprise "Stepan Melnichuk"	ПП "Степан Мельничук"	less than 50 mln. UAH
	20536228	Grushevsky Agricultural Production Cooperative	Сільськогосподарський Виробничий Кооператив Ім. М. Грушевського	less than 50 mln. UAH
	19397098	Farming enterprise "Watra"	ФГ "Ватра"	less than 50 mln. UAH
	853501	Private Agrofirma "Bovshivska"	Приватна Агрофірма "Бовшівська"	less than 50 mln. UAH
Lviv region	25556075	"Barkom" LLC	ТОВ "Барком"	more than 100 mln. UAH
	30472034	Agricultural LLC "Progress-Plus"	Сільськогосподарське ТОВ "Прогрес-Плюс"	more than 100 mln. UAH
	35263487	Private enterprise "Agrofirma" Lugove "	ПП "Агрофірма "Лугове"	more than 100 mln. UAH
	36738335	Farming enterprise "Pchany-Denkovich"	ФГ "Пчани-Денькович"	50-100 mln. UAH
	3760651	Private Agrifirm "Bilyi Stick"	Приватна Агрофірма "Білий Стік"	50-100 mln. UAH
	20760248	State enterprise "investigative household" Radehivske "	Державне підприємство "Дослідне господарство "Радехівське" "	less than 50 mln. UAH
	35603085	"Molochni Riky" LLC	ТОВ "Молочні Ріки"	less than 50 mln. UAH
	30320367	Stefanik Agricultural Manufacturing Cooperative	СВК ІМ.В.Стефаніка	less than 50 mln. UAH
	35313663	Farming enterprise "Mezhyrichcha"	ФГ "Межиріччя"	less than 50 mln. UAH
	30999878	Farming enterprise "Misjaylo Vasyl Lukyanovich"	ФГ "Місйяло Василя Лук'яновича"	less than 50 mln. UAH
Rivne region	30132761	Private enterprise "Agro-Express-Service"	ПП "Агро-Експрес-Сервіс"	more than 100 mln. UAH
	30851635	Agrophirma "Kamaz-Agro"	Агрофірма "Камаз-Агро"	more than 100 mln. UAH
	3775871	Volovikova Agricultural Enterprise LLC	ТОВ СГП "Імені Воловікова"	more than 100 mln. UAH
	39148440	"Agroholding" Zorya" LLC	ТОВ "Агрохолдинг "Зоря"	50-100 mln. UAH
	30563100	Private agricultural enterprise "Ukraine"	ПСП "Україна "	less than 50 mln. UAH
	30716392	Agricultural PE "Rozvazke"	СПП "Розвазьке"	less than 50 mln. UAH
	30661922	Private agricultural enterprise "Shpanivske"	ПСП "Шпанівське"	less than 50 mln. UAH
	30717807	Lesia Ukrainka Agricultural production cooperative	СВК Імені Лесі Українки	less than 50 mln. UAH
	30715417	Private agricultural enterprise "Mayak"	Сільськогосподарське ПП "Маяк"	less than 50 mln. UAH
	30712018	Private agricultural enterprise "Ukraine"	Сільськогосподарське ПП "Україна"	less than 50 mln. UAH
Ternopil region	952829	"Buschachagrochlibprom" LLC	ТОВ "Бучачагрохлібпром"	more than 100 mln. UAH
	3781989	Agricultural LLC "Ukraine"	Сільськогосподарське ТОВ "Україна"	more than 100 mln. UAH
	3782954	Private Agricultural Enterprise Agrofirma "Goryn"	ПСП Агрофірма "Горинь"	more than 100 mln. UAH
	953668	Private Leasing Enterprise "Ivanivske"	Приватно-Орендне Підприємство "Іванівське"	more than 100 mln. UAH
	34653281	"Agroprodservis Invest" LLC	ТОВ "Агропродсервіс Інвест"	more than 100 mln. UAH
	36650963	Private enterprise "Agroprodservice Yarchivtsi"	ПП "Агропродсервіс Ярчівці"	50-100 mln. UAH
	30891374	Agricultural LLC "Podillia"	Сільськогосподарське ТОВ	50-100 mln. UAH

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
			"Поділля"	
	36023635	"Agrocompany" Druzhba " LLC	ТОВ "Агрокомпанія "Дружба"	50-100 mln. UAH
	30828056	Agricultural LLC "Slavutych"	Сільськогосподарське ТОВ "Славутич"	less than 50 mln. UAH
	387022	PJSC "Mshanetske"	ПрАТ "Мшанецьке"	less than 50 mln. UAH
Zakarpattia region	31081226	Private agricultural enterprise "Lastochka"	ПСП "Ласточка"	less than 50 mln. UAH
	35355457	Farming enterprise "Mykulets"	ФГ "Микулець"	less than 50 mln. UAH
	13591327	Private agricultural enterprise Vatra "	"ПСП "Ватра"	less than 50 mln. UAH
	31372809	Farming enterprise "Yurchenko"	СФГ "Юрченко"	less than 50 mln. UAH
	37108248	Farming enterprise "Sasivske"	ФГ "Сасівське"	less than 50 mln. UAH
	32796791	Farming enterprise Agropol	ФГ "Агроспол"	less than 50 mln. UAH
	30854217	Agricultural LLC "Nadia"	Сільськогосподарське ТОВ "Надія"	less than 50 mln. UAH
	33309807	Farming enterprise "Fenix-S"	ФГ "Фенікс-С"	less than 50 mln. UAH
	31019231	"Guzend" LLC	ТОВ "Гузенд"	less than 50 mln. UAH
	33752116	Farming enterprise "Lotos-M-2005"	ФГ "Лотос-М-2005"	less than 50 mln. UAH
Volyn region	5531943	"Volyn Nova" LLC	ТОВ "Волинь Нова"	more than 100 mln. UAH
	31890591	Agricultural LLC "Gorodyshche"	Сільськогосподарське ТОВ "Городище"	more than 100 mln. UAH
	3737284	Agricultural PE "Druzhba"	Сільськогосподарське ПП "Дружба"	more than 100 mln. UAH
	3737422	Agricultural PE "Rat"	Сільськогосподарське ПП "Рать"	50-100 mln. UAH
	3735110	"Progress" LLC	ТОВ "Прогрес"	50-100 mln. UAH
	32644500	Agricultural LLC "Food"	Сільськогосподарське ТОВ "Лище"	50-100 mln. UAH
	3735435	Shevchenko Private agricultural enterprise	Приватно-орендне сільськогосподарське підприємство ім. Шевченка	50-100 mln. UAH
	30740160	Agricultural LLC "Romaniv"	Сільськогосподарське ТОВ "Романів"	50-100 mln. UAH
	3737349	Agricultural production cooperative "Urozhay"	СВК "Урожай"	50-100 mln. UAH
	30958957	Farming enterprise "Amila"	ФГ "Аміла"	50-100 mln. UAH

### **Key obstacles observed in the sector**

While identifying main obstacles for the development of milk production in Western Ukrainian regions 19 companies were contacted, of which 9 (47%) agreed to participate in the survey, and 10 (53%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 2.31. The rating of main obstacles for the development of milk production in Western Ukrainian regions**

The Ukrainian milk production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (32%), inaccessibility of funding (16%) and shortage of workers (11%).

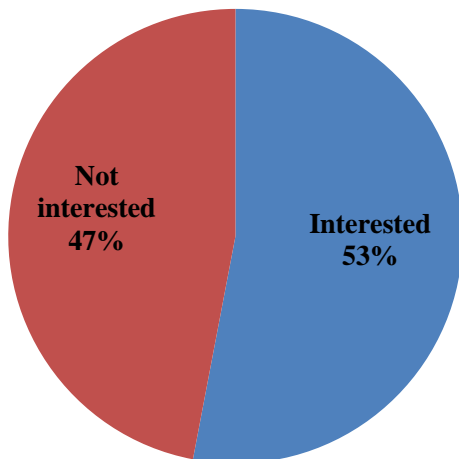
The lack of affordable financing (interest rate up to 10% per annum) is mostly mentioned by small and medium-sized milk producers with a dairy herd of up to 50-100 heads. These producers, because of the ineffective system of agri-subsidies, actually do not receive financial assistance from the government; 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.

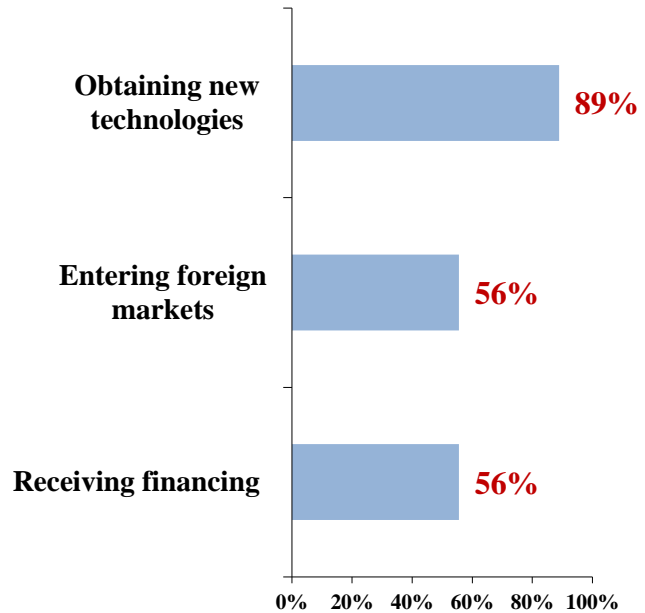
After the introduction of Russia's embargo on Ukrainian dairy products (milk of the 2nd grade was used for their production) dairies are not in urgent need of 2nd grade milk. Now there is a shortage of high-quality premium milk, and an increase in its production requires investments in dairy herds and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

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 47% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (89%), receiving financing (56%) and entering foreign markets (56%).



**Fig. 2.32. The interest of milk production enterprises in cooperation with the Dutch business**



**Fig. 2.33. Main areas of potential cooperation with the Dutch business in milk production, %**

## 2.4. Processing of milk

### General overview of the sector

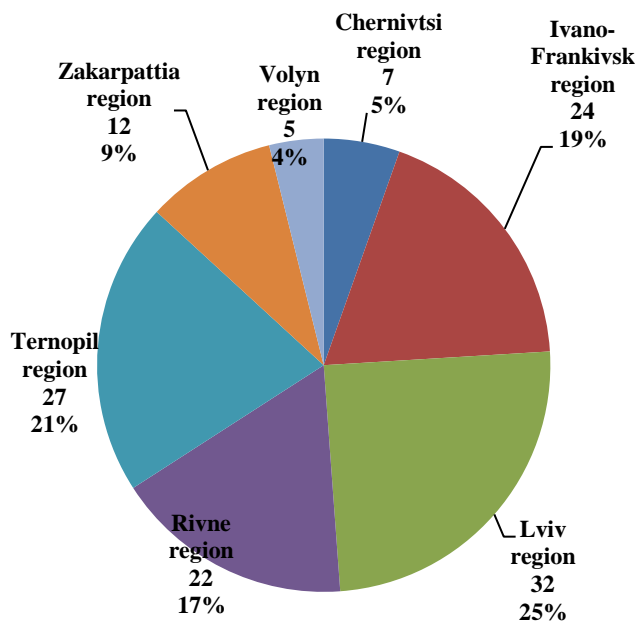
In Western Ukrainian regions, there are 129 enterprises processing milk, of which 68 are legal entities (53%), and 61 - individual entrepreneurs (about 47%).

The largest number of companies operates in the Lviv region (32 units or 25%), and the least - in Volyn region (5 units or 4%).

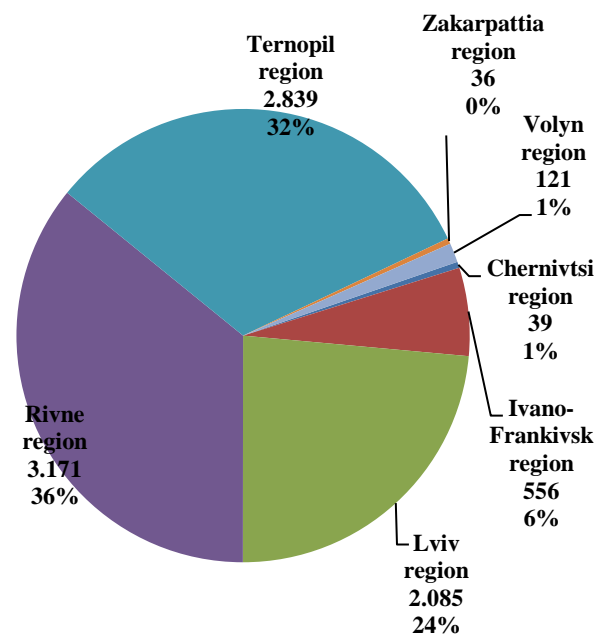
The sector is employing 8 847 full-time employees, including 8 536 in legal entities (96%), and 311 are employed by individual entrepreneurs (about 4%). The sector's leader by the number of employees is Rivne region (3 171 people or 36%), while the smallest employment in the sector is in Zakarpattia region (36 people or 0.4%).

**Table 2.21. Number of functioning enterprises and employment in milk processing in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	4	3	7	31	8	39
Ivano-Frankivsk region	10	14	24	484	72	556
Lviv region	16	16	32	2 053	32	2 085
Rivne region	16	6	22	3 025	146	3 171
Ternopil region	16	11	27	2 816	23	2 839
Zakarpattia region	2	10	12	7	29	36
Volyn region	4	1	5	120	1	121
<b>Total West Ukraine regions</b>	<b>68</b>	<b>61</b>	<b>129</b>	<b>8 536</b>	<b>311</b>	<b>8 847</b>



**Fig. 2.34. Breakdown of milk processing enterprises by regions, units**



**Fig. 2.35. Regional employment structure in processing of milk, people**



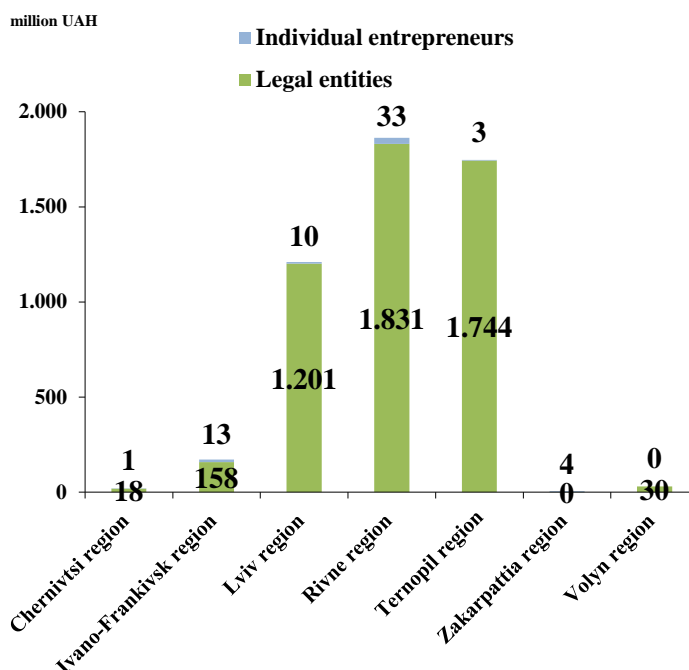
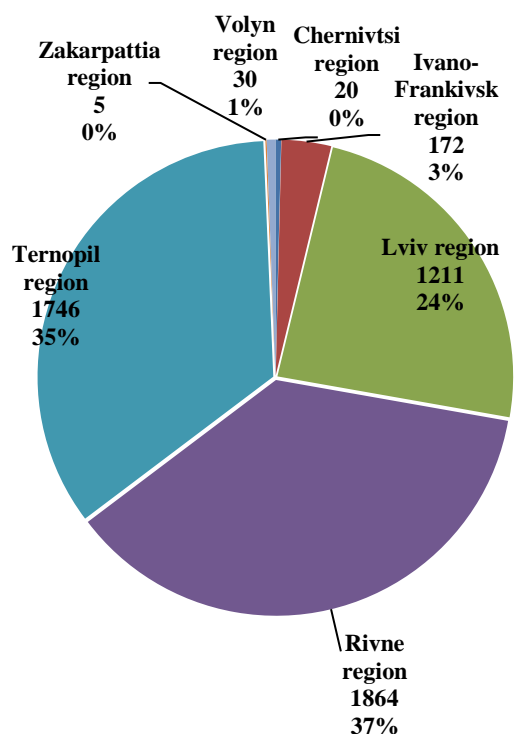
Sales

In 2016, sales volume of dairy products enterprises amounted to about UAH 5 046 million, of which UAH 4 982 million were generated by legal entities (99%), and the rest UAH 64 million – by individual entrepreneurs (about 1%).

In the regional structure, the leaders are Rivne region (UAH 1 864 million or 37% of sales), Ternopil region (UAH 1 746 million or 35%) and Lviv region (UAH 1 211 million or 24%). Together, these regions account for more than 96% of dairy products sales among Western Ukrainian regions.

**Table 2.22. The volume of sales of milk processing enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	18,4	1,0	19,5
Ivano-Frankivsk region	158,1	13,4	171,6
Lviv region	1 200,9	9,5	1 210,5
Rivne region	1 830,8	32,9	1 863,8
Ternopil region	1 743,7	2,7	1 746,4
Zakarpattia region	0,2	4,3	4,5
Volyn region	29,6	0,0	29,6
<b>Total West Ukraine regions</b>	<b>4 981,8</b>	<b>63,9</b>	<b>5 045,7</b>



**Fig. 2.36. Regional sales of dairy products, million UAH**

**Fig. 2.37. Regional sales of dairy products by type of business entity, million UAH**

**Production**

Production volumes of the main types of dairy products in the studied regions in 2014-2016 are shown in the Table 2.23.

Ternopil and Lviv regions occupies the dominant position in milk processing, mainly due to Ternopil dairy (TM Molokiya) and Lviv dairy (TM Galychuyna), whose products are presented in many regions of Ukraine (including Kyiv).

**Table 2.23. Production volumes of main types of dairy products in 2014-2016, tons**

<b>Products, Region</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Processed liquid milk</b>			
Chernivtsi	180	191	573
Ivano-Frankivsk	5 123	4 985	5 354
Ternopil	27 270	28 151	29 418
Rivne	5 388	4 965	12 486
Volyn	127	123	136
Zakarpattia	0	0	0
Lviv	24 223	5 195	8 629
<b>Total 7 regions</b>	<b>62 311</b>	<b>43 610</b>	<b>56 596</b>
Total Ukraine	1 080 069	965 740	926 145
<i>The share of 7 regions in Ukrainian production, %</i>	<b>5,8%</b>	<b>4,5%</b>	<b>6,1%</b>
<b>Milk and cream of &gt; 6% fat, not concentrated or sweetened</b>			
Chernivtsi	0	0	0
Ivano-Frankivsk	83	52	45
Ternopil	286	142	157
Rivne	41	35	42
Volyn	27	11	20
Zakarpattia	0	0	0
Lviv	31	41	32
<b>Total 7 regions</b>	<b>468</b>	<b>281</b>	<b>296</b>
Total Ukraine	63 762	61 444	63 164
<i>The share of 7 oblasts in Ukrainian production, %</i>	<b>0,7%</b>	<b>0,5%</b>	<b>0,5%</b>
<b>Butter</b>			
Chernivtsi	41	38	40
Ivano-Frankivsk	716	351	482
Ternopil	0	3 515	4 243
Rivne	2 035	1 014	2 246
Volyn	81	665	1 580
Zakarpattia	0	0	0
Lviv	2 222	635	1 534
<b>Total 7 regions</b>	<b>5 095</b>	<b>6 218</b>	<b>10 125</b>
Total Ukraine	114 497	101 687	100 975
<i>The share of 7 regions in Ukrainian production, %</i>	<b>4,4%</b>	<b>6,1%</b>	<b>10,0%</b>
<b>Fresh unfermented cheese</b>			
Chernivtsi	24	54	80
Ivano-Frankivsk	468	445	488
Ternopil	1 503	1 320	1 292

Products, Region	2014	2015	2016
Rivne	868	448	1121
Volyn	31	32	30
Zakarpattia	17	14	18
Lviv	484	37	71
<b>Total 7 regions</b>	<b>3 395</b>	<b>2 350</b>	<b>3 100</b>
Total Ukraine	74 348	67 173	69 591
<i>The share of 7 regions in Ukrainian production, %</i>	<b>4,6%</b>	<b>3,5%</b>	<b>4,5%</b>
<b>Yoghurt and other fermented or acidified milk or cream</b>			
Chernivtsi	208	330	431
Ivano-Frankivsk	3 358	2 808	2 822
Ternopil	21 533	25 224	24 644
Rivne	4 945	2 594	5 595
Volyn	44	47	56
Zakarpattia	51	48	46
Lviv	34 493	10 415	21 951
<b>Total 7 regions</b>	<b>59 687</b>	<b>41 466</b>	<b>55 545</b>
Total Ukraine	469 666	426 121	420 155
<i>The share of 7 regions in Ukrainian production, %</i>	<b>12,7%</b>	<b>9,7%</b>	<b>13,2%</b>

Source: State Statistics Service of Ukraine

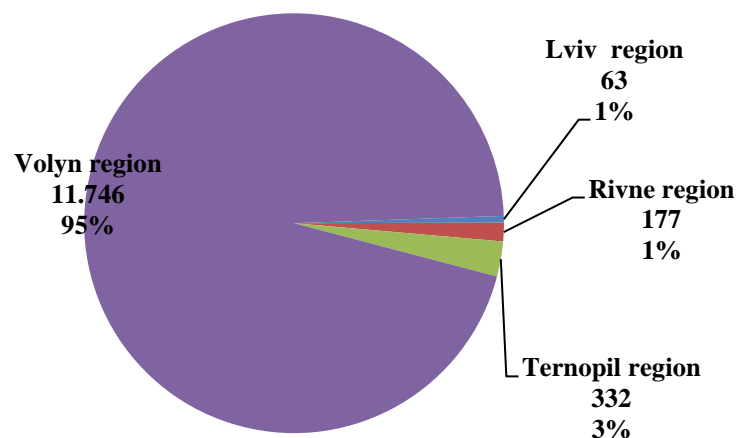
### Export

In 2016, the volume of dairy products export in Western Ukrainian regions amounted to about USD 12.3 million, of which almost 95% was generated by Volyn region (USD 11.7 million).

Volyn companies mainly export whey for Asian countries (Vietnam, China, Pakistan, Myanmar, etc.)

**Table 2.24. The volume of dairy products export in 2016, thousand USD**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Processing milk			63	177	332		11 746	12 318



**Fig. 2.38. Regional breakdown of dairy products export, thousand USD**

**Leading companies of the sector**

The main milk processing companies in Western Ukrainian regions are PJSC "Dubnomoloko", PrJSC "Ternopil milk factory Molokiya" and PJSC "Lviv Cold Combine".

**Table 2.25. Leading milk processing companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
5496081	PJSC "Dubnomoloko"	ПАТ "Дубномолоко"	more than 100 mln. UAH
30356917	PrJSC "Ternopil milk factory Molokiya"	ПрАТ «Тернопільський молокозавод»	more than 100 mln. UAH
1553706	PJSC "Lviv Cold Combine"	ПАТ "Львівський Холодокомбінат"	more than 100 mln. UAH
39685014	"Dairy Company" Galychyna" LLC	ТОВ "Молочна Компанія "Галичина"	more than 100 mln. UAH
31259168	LLC "Radivilivmoloko"	ТОВ "Радивилівмолоко"	more than 100 mln. UAH
30917423	"Kremenets Moloko" LLC	ТОВ "Кременецьке Молоко"	more than 100 mln. UAH
447238	"Galychyna Lasunka" LLC	ТОВ "Галичина Ласунка"	more than 100 mln. UAH
22335971	PE "Alma-Vita"	ПП "Альма-Віта"	more than 100 mln. UAH
445676	"Ivano-Frankivsk milk factory" ALC	ТДВ "Івано-Франківський Міськмолокозавод"	50-100 mln. UAH
31126518	"Ukrmolprodukt" LLC	ТОВ "Укрмолпродукт"	50-100 mln. UAH

Regional distribution of the largest companies in the sector is shown in Table 2.26.

**Table 2.26. Top-10 milk processing companies by region**

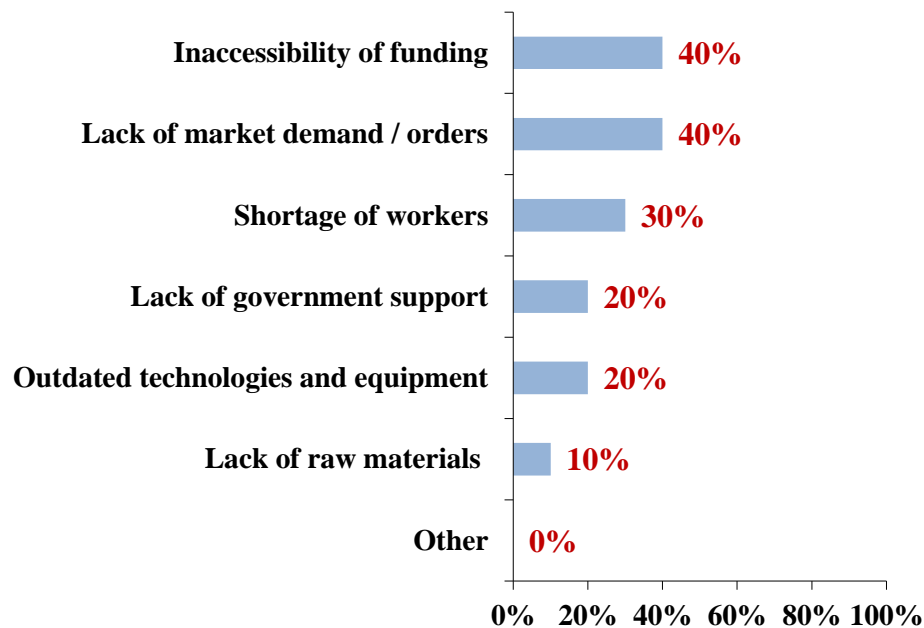
Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	36022081	"Putylska Molocharnia" LLC	ТОВ "Путильська Молочарня"	less than 50 mln. UAH
	38791762	"Ecolat" LLC	ТОВ "Еколат"	less than 50 mln. UAH
	447899	"Zastavniivsky Masloozavod" ALC	ТДВ "Заставнівський Маслозавод "	less than 50 mln. UAH
	36755392	"Agricultural Cooperative Enterprise " Molochny Krai" LLC	ТОВ "Сільськогосподарське Кооперативне Підприємство "Молочний Край"	less than 50 mln. UAH
Ivano-Frankivsk region	445676	"Ivano-Frankivsk milk factory" ALC	ТДВ "Івано-Франківський Міськмолокозавод"	50-100 mln. UAH
	30814656	"Bogorodchany milk factory " LLC	ТОВ "Богородчанський Молокозавод"	less than 50 mln. UAH
	19397218	Polonina ALC	ТДВ "Полонина."	less than 50 mln. UAH
	36280278	Farming Enterprise "Еко-Карпати"	ФГ "Еко-Карпати"	less than 50 mln. UAH
	31521852	"Aisberg" LLC	ТОВ "Айсберг"	less than 50 mln. UAH
	32175629	Private Production Company "Molokozaivod-Karpaty"	Приватне Виробниче Підприємство "Молокозавод-Карпати"	less than 50 mln. UAH
	40005030	"Euroorganik-Ivano-Frankivsk" LLC	ТОВ "Євроорганік-Івано-Франківськ"	less than 50 mln. UAH
	34077605	Private enterprise "Prykarpatprodorg"	ПП "Прикарпатпродторг"	less than 50 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Lviv region	1553706	PJSC "Lviv Cold Combine"	ПАТ "Львівський Холодокомбінат"	more than 100 mln. UAH
	39685014	"Dairy Company" Galychyna LLC	ТОВ "Молочна Компанія "Галичина"	more than 100 mln. UAH
	446374	PJSC "Brody factory of dry reduced milk"	ПАТ "Бродівський завод сухого знежиреного молока"	less than 50 mln. UAH
	424415	"Molokozavod" Sambirskiy " LLC	ТОВ "Молокозавод "Самбірський"	less than 50 mln. UAH
	38991462	"Skomex-Ukraine" LLC	ТОВ "Скомекс-Україна"	less than 50 mln. UAH
	25553579	PJSC "Galychyna"	ПрАТ "Галичина"	less than 50 mln. UAH
	38037634	"Komarno SyrzaVod" LLC	ТОВ "Комарнівський Сирзавод"	less than 50 mln. UAH
	40061247	"Gal Syr Product" LLC	ТОВ "Гал Сир Продукт"	less than 50 mln. UAH
	39382809	"Sinogora Trading House" LLC	ТОВ "Торговий Дім "Синьогора"	less than 50 mln. UAH
	36767832	Agricultural Production Cooperative "Dobrotvoretz"	СВК "Добротворець"	less than 50 mln. UAH
Rivne region	5496081	PJSC "Dubnomoloko"	ПАТ "Дубномолоко"	more than 100 mln. UAH
	31259168	"Radyvylivmoloko" LLC	ТОВ "Радивилівмолоко"	more than 100 mln. UAH
	31126518	"Ukrmolprodukt" LLC	ТОВ "Укрмолпродукт"	50-100 mln. UAH
	32413662	"Bimol" LLC	ТОВ "Бімол"	less than 50 mln. UAH
	36788894	"Monashynski Siri" LLC	ТОВ "Монашинські Сири"	less than 50 mln. UAH
	22565062	Small Private enterprise "R.T.D. Sokil"	Мале ПП "Р.Т.Д.Сокіл"	less than 50 mln. UAH
	37246044	Private enterprise "Smakosyr"	ПП "Смакосир"	less than 50 mln. UAH
	39454092	"Leaderprodukt" LLC	ТОВ "Лідерпродукт"	less than 50 mln. UAH
	40227571	"Dubrovitskiy Factory For Foodstuffs" LLC	ТОВ "Дубровицький Завод Продовольчих Товарів"	less than 50 mln. UAH
	39057667	"Goschanochka" LLC	ТОВ "Гошаночка"	less than 50 mln. UAH
Ternopil region	30356917	PrJSC "Ternopil milk factory Molokiya"	ПрАТ «Тернопільський молокозавод»	more than 100 mln. UAH
	30917423	"Kremenets Moloko" LLC	ТОВ "Кременецьке Молоко"	more than 100 mln. UAH
	447238	"Galychyna Lasunka" LLC	ТОВ "Галичина Ласунка"	more than 100 mln. UAH
	22335971	PE "Alma-Vita"	ПП "Альма-Віта"	more than 100 mln. UAH
	447184	PJSC "Borschiv cheese factory "	ПАТ "Борщівський сирзавод"	50-100 mln. UAH
	31273575	"Rossa" LLC	ТОВ "Росса"	less than 50 mln. UAH
	30811896	"Buchach cheese factory" LLC	ТОВ "Буцацький Сирзавод"	less than 50 mln. UAH
	447155	"Shumsk Maslozavod" LLC	ТОВ "Шумський Маслозавод"	less than 50 mln. UAH
	30497693	"Start" LLC	ТОВ "Старт"	less than 50 mln. UAH
	31914402	"Ukrainske Morozyvo" LLC	ТОВ "Українське Морозиво"	less than 50 mln. UAH
Zakarpattia region	36461243	Private enterprise "CHI. Imex"	ПП "ЧІ. Імекс"	less than 50 mln. UAH
	35152473	"Sevlush Sir" LLC	ТОВ "Севлюш Сир"	less than 50 mln. UAH
Volyn region	21743840	"Shatsky Molokoavod" LLC	ТОВ "Шацький Молокозавод"	less than 50 mln. UAH
	39808792	"Fresh Trade" LLC	ТОВ "Фреш Трейд"	less than 50 mln. UAH
	444636	Public Joint Stock Company "Kovelmoloko"	ПАТ "Ковельмолоко"	less than 50 mln. UAH
	30394439	"Production and Commercial Firm "Volyn-Prodakshn" LLC	ТОВ "Виробничо-Комерційна Фірма "Волинь-Продакшн"	less than 50 mln. UAH

**Key obstacles observed in the sector**

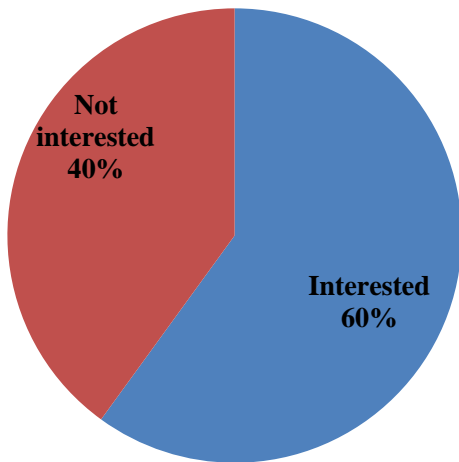
While identifying main obstacles for the development of milk processing in Western Ukrainian regions 10 companies were contacted, of which 6 (60%) agreed to participate in the survey, and 4 (40%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



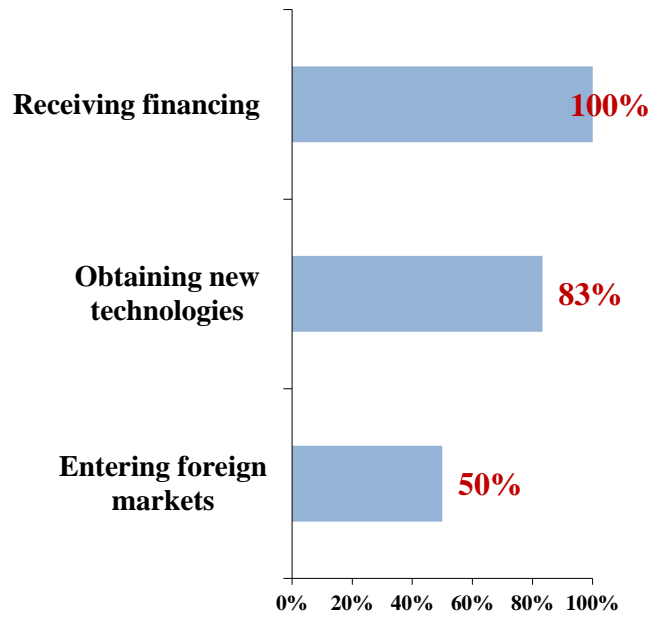
**Fig. 2.39. The rating of main obstacles for the development of milk processing in Western Ukrainian regions**

The Ukrainian milk processing sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: inaccessibility of funding (40%), lack of market demand (40%), and shortage of workers (30%).

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 60% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in receiving financing (100%), obtaining new technologies (83%) and entering foreign markets (50%).



**Fig. 2.40. The interest of milk processing enterprises in cooperation with the Dutch business**



**Fig. 2.41. Main areas of potential cooperation with the Dutch business in milk processing, %**

## 2.5. Processing and preserving of fruit and vegetables

### General overview of the sector

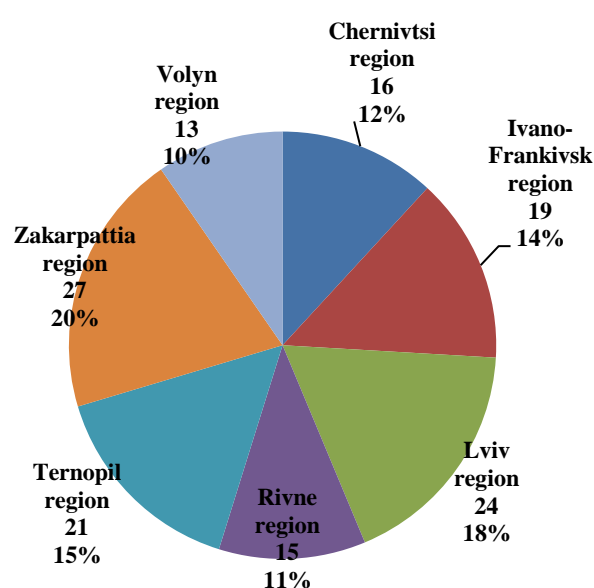
In Western Ukrainian regions, there are 135 enterprises producing and processing fruit and vegetables, of which 88 are legal entities (65%), and 47 - individual entrepreneurs (about 35%).

The largest number of companies operates in Zakarpattia region (27 units or 20%), and the least - in Volyn region (13 units or 10%).

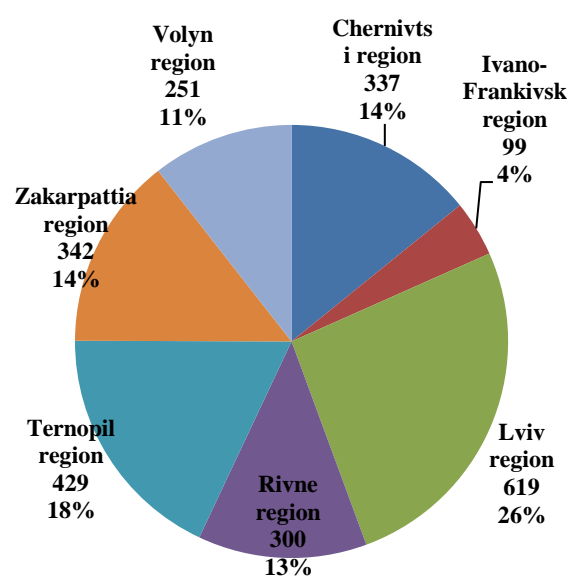
The sector is employing 2 377 full-time employees, including 2 290 in legal entities (96%), and 87 are employed by individual entrepreneurs (about 4%). The sector's leader by the number of employees is Lviv region (619 people or almost 26%), while the smallest employment in the sector is in Ivano-Frankivsk region (99 people or 4%).

**Table 2.27. Number of functioning enterprises and employment in processing and preserving of fruit and vegetables in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	11	5	16	330	7	337
Ivano-Frankivsk region	9	10	19	85	14	99
Lviv region	15	9	24	606	13	619
Rivne region	12	3	15	297	3	300
Ternopil region	14	7	21	416	13	429
Zakarpattia region	18	9	27	313	29	342
Volyn region	9	4	13	243	8	251
<b>Total West Ukraine regions</b>	<b>88</b>	<b>47</b>	<b>135</b>	<b>2 290</b>	<b>87</b>	<b>2 377</b>



**Fig. 2.42. Breakdown of processing and preserving of fruit and vegetables enterprises by regions, units**



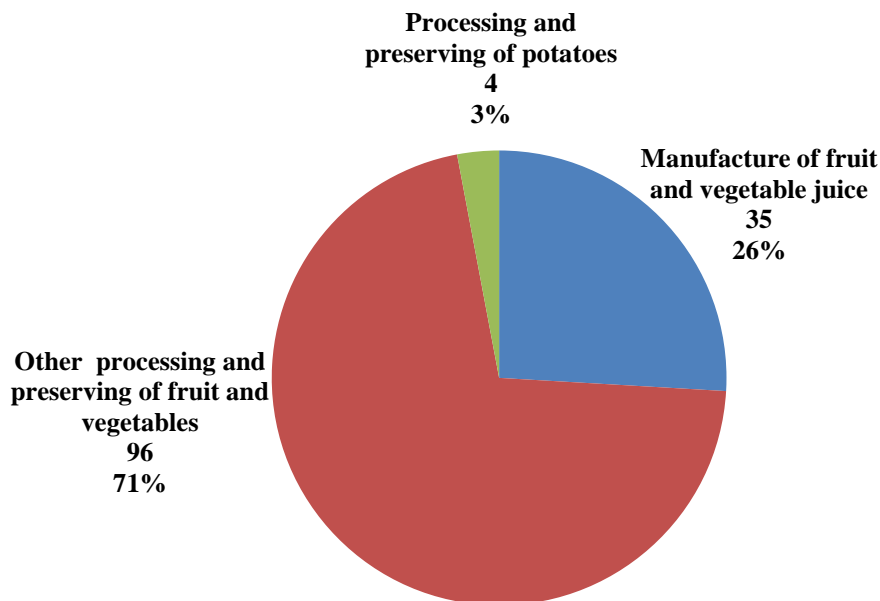
**Fig. 2.43. Regional employment structure in processing and preserving of fruit and vegetables, people**



In terms of sub-sectors, the largest number of enterprises operates in other processing and preserving of fruit and vegetables (71%), and the smallest - in the processing and preserving of potatoes (3%).

**Table 2.28. 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
Chernivtsi region	6	9	1	16
Ivano-Frankivsk region	5	13	1	19
Lviv region	10	12	2	24
Rivne region	2	13		15
Ternopil region	6	15		21
Zakarpattia region	6	21		27
Volyn region		13		13
<b>Total West Ukraine regions</b>	<b>35</b>	<b>96</b>	<b>4</b>	<b>135</b>



**Fig. 2.44. Breakdown of processing and preserving of fruit and vegetables enterprises by subsectors, units**

## Sales

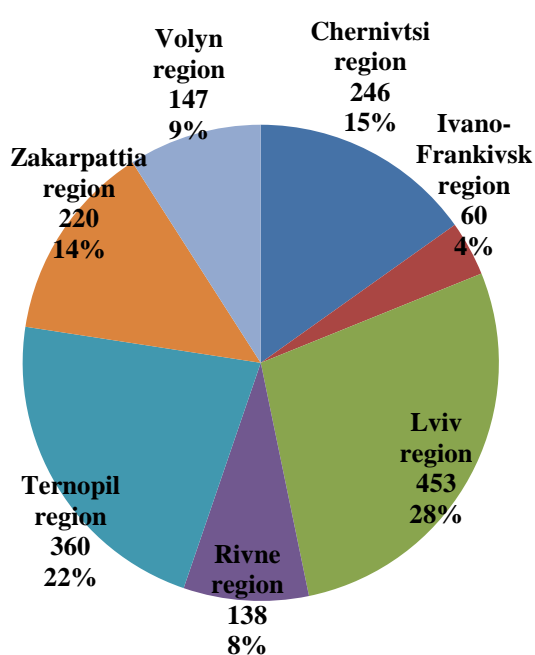
In 2016, sales volume of fruit and vegetable processing enterprises amounted to about UAH 1 626 million, of which UAH 1 609 million were generated by legal entities (more than 99%), and the rest UAH 17 million – by individual entrepreneurs (about 1%).

In the regional structure, the leaders are Lviv region (UAH 453 million or 28% of sales), Ternopil region (UAH 361 million or 22%) and Chernivtsi region (UAH 247 million or 15%). Together, these regions account for more than 65% of processed fruit and vegetable sales among Western Ukrainian regions.

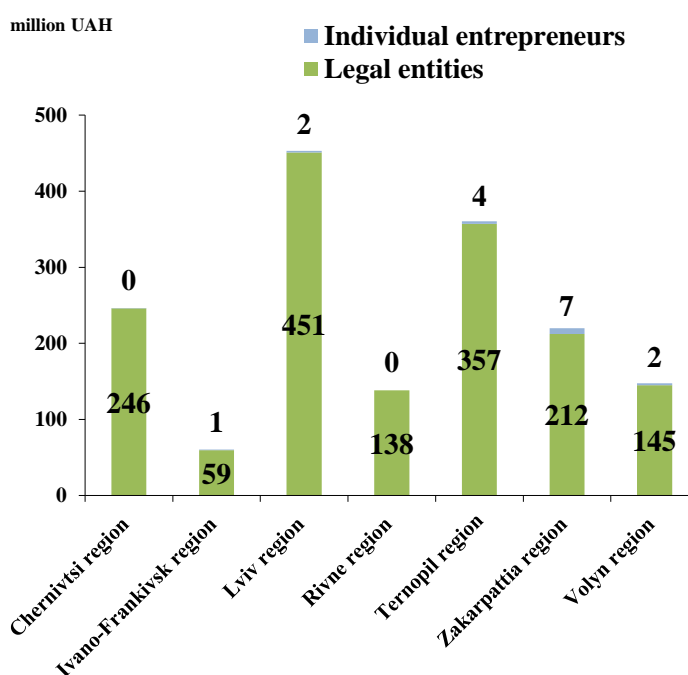
According to the results of companies' survey, the average level of sales through retail networks in processing and preserving of fruit and vegetables is about 15%.

**Table 2.29. The volume of sales of processing and preserving of fruit and vegetable enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	246,1	0,3	246,5
Ivano-Frankivsk region	59,5	1,0	60,5
Lviv region	450,8	2,2	453,0
Rivne region	138,1	0,0	138,1
Ternopil region	356,8	3,6	360,5
Zakarpattia region	212,3	7,3	219,7
Volyn region	145,0	2,3	147,3
<b>Total West Ukraine regions</b>	<b>1 608,7</b>	<b>16,8</b>	<b>1 625,5</b>



**Fig. 2.45. Regional sales of processing and preserving of fruit and vegetables sector, million UAH**

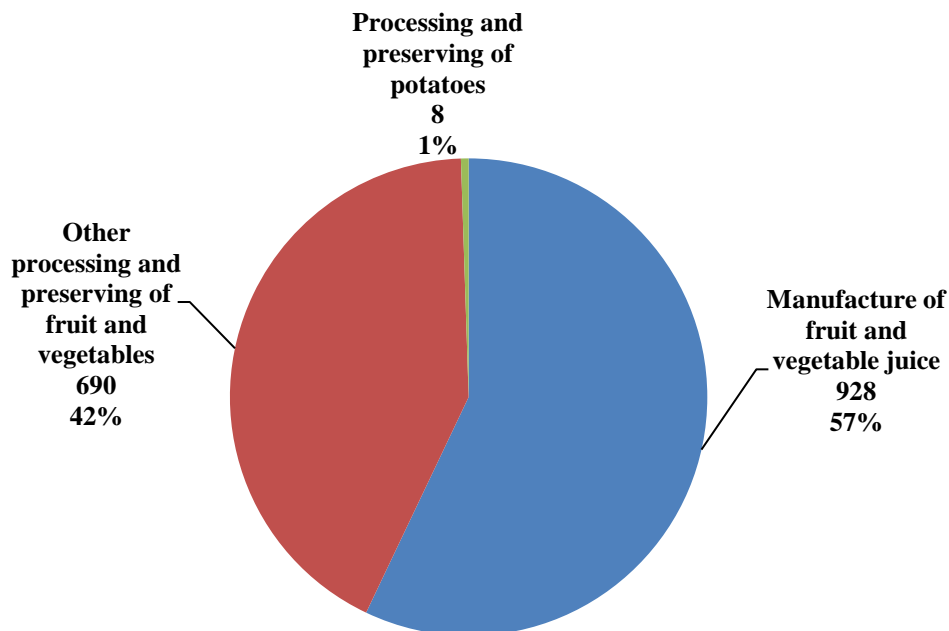


**Fig. 2.46. Regional sales of processing and preserving of fruit and vegetables sector by type of business entity, million UAH**

In the commodity structure of sales, the sales of fruit and vegetable juice dominate (57% of total sales of the sector). Manufacture of fruit and vegetable juice prevails in Lviv region (sales volume – 308 UAH million or 33%), other processing and preserving of fruit and vegetables dominates in Volyn region (UAH 143 million or 21%), and processing and preserving of potatoes – in Chernivtsi region (UAH 5 mln. or 63%).

**Table 2.30. Sales of processing and preserving of fruit and vegetables in 2016 by subsectors, mln. UAH**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Manufacture of fruit and vegetable juice	226,1	6,7	307,7	28,6	274,4	80,1	4,1	927,6
Other processing and preserving of fruit and vegetables	15,1	53,7	142,3	109,6	86,1	139,6	143,2	689,5
Processing and preserving of potatoes	5,3	0,0	3,0	0,0	0,0	0,0	0,0	8,4
<b>TOTAL</b>	<b>246,5</b>	<b>60,5</b>	<b>453,0</b>	<b>138,1</b>	<b>360,5</b>	<b>219,7</b>	<b>147,3</b>	<b>1 625,5</b>



**Fig. 2.47. Sales of processing and preserving of fruit and vegetables by subsectors, mln. UAH**

**Production**

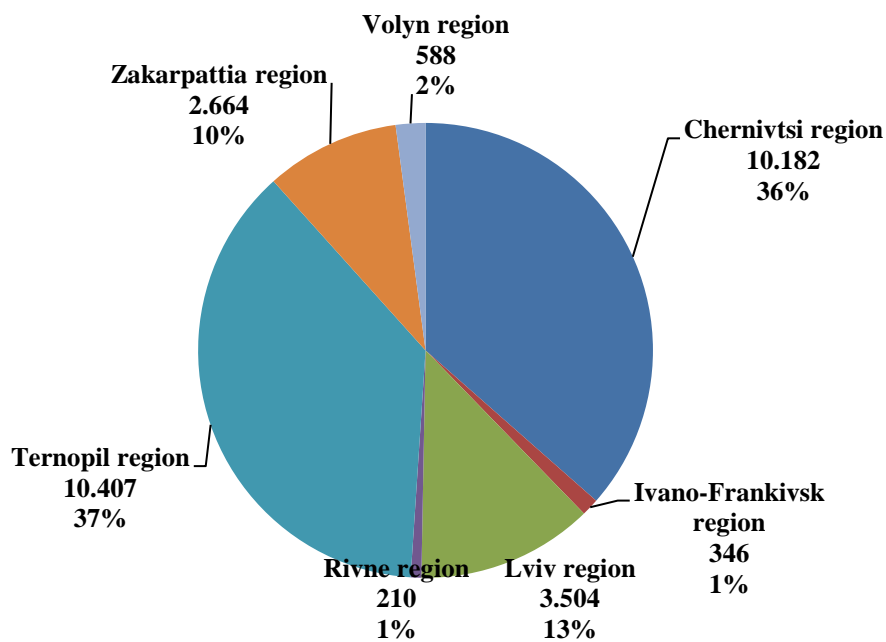
In Western Ukrainian regions, the volume of fruit and vegetable juices production in 2016 amounted to 27.9 thousand tons, which is about 12% of the total production in Ukraine.

In the regional structure, the leaders are Ternopil region (10.4 thousand tons or 50% of sales) and Chernivtsi region (10.2 thousand tons or 48%).

Juice production is extremely concentrated - the 3 largest juice production companies (Dinter Ukraine Skala, "Doler Bukovyna" LLC, "SO'OK" LLC) account for over 90% of production.

**Table 2.31. The volume of fruit and vegetable juices production in 2016, tons**

Region	2016
Chernivtsi region	10 182
Ivano-Frankivsk region	346
Lviv region	3 504
Rivne region	210
Ternopil region	10 407
Zakarpattia region	2 664
Volyn region	588
<b>Subtotal in 7 regions</b>	<b>27 901</b>
<b>Total production in Ukraine</b>	<b>231 892</b>
<b>Share of 7 regions in Ukraine's production</b>	<b>12,0%</b>



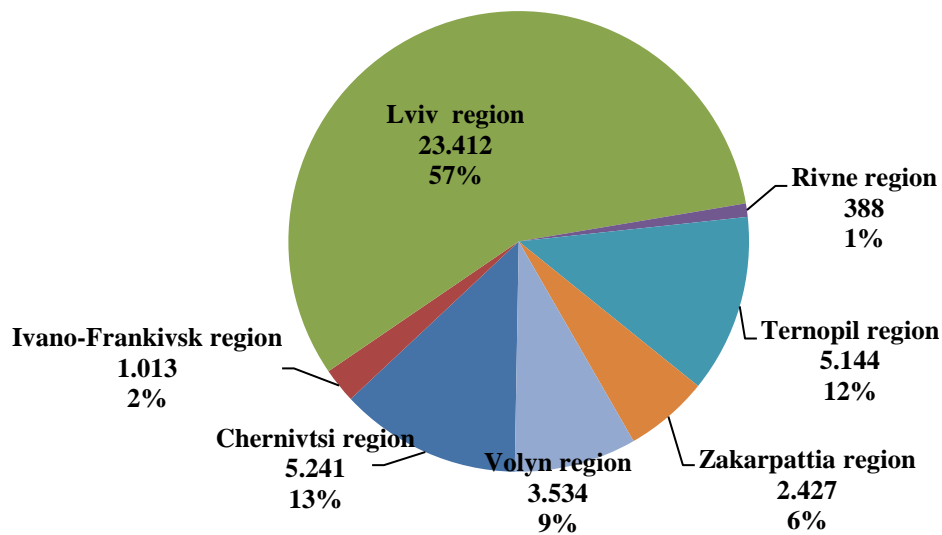
**Fig. 2.48. Regional breakdown of fruit and vegetable juices production in 2016, tons**

**Export**

In 2016, the volume of processed fruit and vegetables export in Western Ukrainian regions amounted to about USD 41.2 million, of which almost 57% was generated by Lviv region (USD 23.4 million) and 13% was generated by Chernivtsi region (USD 5.2 million).

**Table 2.32. The volume of export of the processed and preserved fruit and vegetables in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Preparation of vegetables, fruit, nuts or other parts of plants	5 241	1 013	23 412	388	5 144	2 427	3 534	41 158



**Fig. 2.49. Regional breakdown of processed and preserved fruit and vegetables exports in 2016, thousand USD**

**Leading companies of the sector**

The main companies processing and preserving fruit and vegetables in the Western Ukrainian regions are Yablunevyy Dar" LLC, Dinter Ukraine Skala (SE "Dinter Ukraine" LLC) and "Doler Bukovyna" LLC.

**Table 2.33. Leading processing and preserving of fruit and vegetables companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
32475074	"Yablunevyy Dar" LLC	ТОВ " Яблуневий Дар"	more than 100 mln. UAH
35368754	Dinter Ukraine Skala, SE "Dinter Ukraine" LLC	ДП "Дінтер Україна Скала" ТОВ "Дінтер Україна"	more than 100 mln. UAH
33688879	"Doler Bukovyna" LLC	ТОВ "Дьолер Буковина"	more than 100 mln. UAH
34838293	"Galfrost" LLC	ТОВ "Галфрост"	50-100 mln. UAH
36748170	"SO'OK" LLC	ТОВ "СО'ОК"	50-100 mln. UAH
374284	PJSC "Novoushytsky Canned Factory"	ПАТ "Новоушицький Консервний Завод"	50-100 mln. UAH
34699310	PE "Agrospetsgosp"	ПП "Агроспецгосп"	50-100 mln. UAH
35771408	"Frutto Master Foods" LLC	ТОВ "Фрут Майстер Фудс"	50-100 mln. UAH
22572180	Production and trading enterprise "Agropererobka" LLC	ТОВ виробничо-торговельне підприємство "Агропереробка"	50-100 mln. UAH
25557666	Production-commercial enterprise "Shchedra Nyva" LLC	ТОВ виробничо-комерційне підприємство "Щедра Нива"	50-100 mln. UAH

Regional distribution of the largest companies in the sector are shown in Table 2.34.

**Table 2.34. Top-10 companies of processing and preserving of fruit and vegetables by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	33688879	"Doler Bukovyna" LLC	ТОВ "Дьолер Буковина"	more than 100 mln. UAH
	36748170	"SO'OK" LLC	ТОВ "СО'ОК"	50-100 mln. UAH
	39761131	"Sokiryany juice plant " LLC	ТОВ "Соковий Завод Сокирянський"	less than 25 mln. UAH
	40220106	"Lilak" LLC	ТОВ "Лілак"	less than 25 mln. UAH
	5398421	PrJSC "Bukovinaproduct"	ПрАТ "Буковинапродукт"	less than 25 mln. UAH
	38596018	"Snektreyd-2013" LLC	ТОВ "Снектрейд-2013"	less than 25 mln. UAH
	36965870	"Ecotreyd-2010" LLC	ТОВ "Екотрейд-2010"	less than 25 mln. UAH
	30844146	"Gals LTD" LLC	ТОВ "Галс ЛТД"	less than 25 mln. UAH
	38907386	"Bionerika" LLC	ТОВ "Біонеріка"	less than 25 mln. UAH
21435825	Charitable Small Enterprise "Perlina Bukovini"	Благодійне МП "Перлина Буковини"	less than 25 mln. UAH	
Ivano-Frankivsk region	35185378	"Cannery " Konservatoria " LLC	ТОВ "Консервний Завод "Консерваторія"	25-50 mln. UAH
	23797343	"Torro" LLC	ТОВ "Торро"	25-50 mln. UAH
	14276438	"Al-Prut" LLC	ТОВ "АЛ-ПРУТ"	less than 25 mln. UAH
	25073081	Private Agriculture Manufacturing Company Firm "Kvilt"	Приватне Сільськогосподарське Виробничо-Торгове Підприємство Фірма "Квілт"	less than 25 mln. UAH

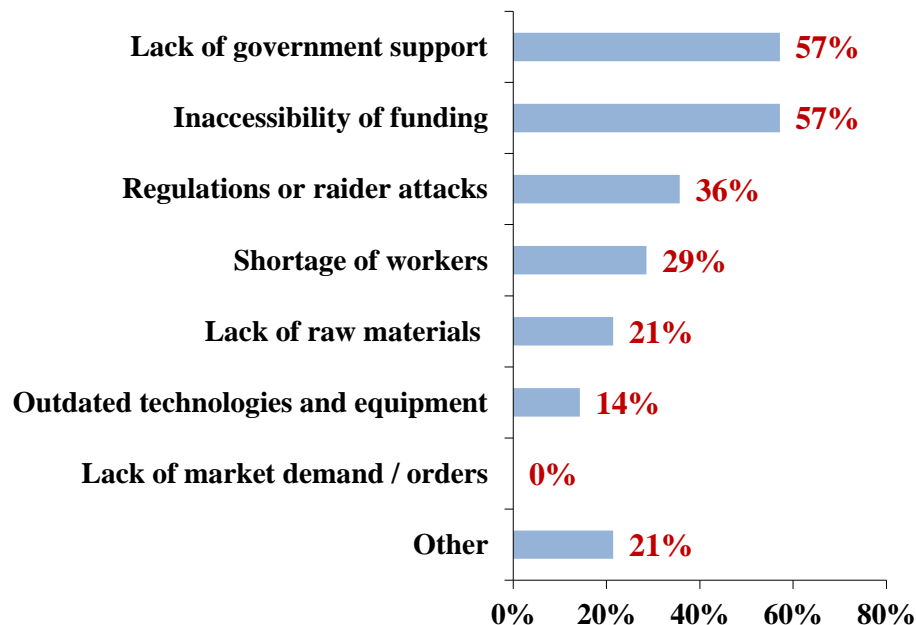
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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	19400765	"Amarants" LLC	ТОВ "Амарант"	less than 25 mln. UAH
	32402781	"Vokol" LLC	ТОВ "Вокол"	less than 25 mln. UAH
Ternopil region	35368754	Dinter Ukraine Skala, SE "Dinter Ukraine" LLC	ДП "Дінтер Україна Скала" ТОВ "Дінтер Україна"	more than 100 mln. UAH
	34699310	PE "Agrospetsgosp"	ПП "Агроспецгосп"	50-100 mln. UAH
	31021570	"Sim-Sim" LLC	ТОВ "Сім-Сім"	25-50 mln. UAH
	39864836	"Adamant 2000" LLC	ТОВ "Адамант 2000"	less than 25 mln. UAH
	38440178	PE "Combine Of Food Products"	ПП "Комбінат Продуктів Харчування"	less than 25 mln. UAH
	31274076	Krona LLC	ТОВ Крона	less than 25 mln. UAH
	38686876	"Agropromsad" LLC	ТОВ "Агропромсад"	less than 25 mln. UAH
	39458689	Enterprise of Citizens "Ekoproduct"	Підприємство Об'єднання Громадян "Екопродукт"	less than 25 mln. UAH
	38303202	"Perspectyva-KMN" LLC	ТОВ "Перспектива-КНМ"	less than 25 mln. UAH
	25348537	PE "Zrrachanka"	ПП "Збручанка"	less than 25 mln. UAH
Lviv region	32475074	"Yablunevy Dar" LLC	ТОВ "Яблуневий Дар"	more than 100 mln. UAH
	34838293	"Galfrost" LLC	ТОВ "Галфрост"	50-100 mln. UAH
	374284	PJSC "Novoushytsky Canned Factory"	ПАТ "Новоушицький Консервний Завод"	50-100 mln. UAH
	34387320	"Karpaty-Eco" LLC	ТОВ "Карпати-Еко"	less than 50 mln. UAH
	38370090	"Galicharropak" LLC	ТОВ "Галичагропак"	less than 50 mln. UAH
	38581148	"Velts" LLC	ТОВ "Велтс"	less than 50 mln. UAH
	32025733	"Proagro" LLC	ТОВ "Проагро"	less than 50 mln. UAH
	20796001	"Vodoliy" LLC FIRM	ТОВ Фірма "Водолій"	less than 50 mln. UAH
	35313815	"Tsetera" LLC	ТОВ "Цетера"	less than 50 mln. UAH
	35826309	"Drohobytsky fruit canning plant" LLC	ТОВ "Дрогобицький плодоконсервний завод"	less than 50 mln. UAH
Rivne region	22572180	production and trading enterprise "Agropererobka" LLC	ТОВ виробничо-торговельне підприємство "Агропереробка"	50-100 mln. UAH
	25557666	production-commercial enterprise "Shchedra Nyva" LLC	ТОВ виробничо-комерційне підприємство "Щедра Нива"	50-100 mln. UAH
	379413	PJSC "Goshcha foodstuff factory "	ПрАТ "Гощанський завод продтоварів"	less than 50 mln. UAH
	1733288	Enterprise of consumer cooperation "Rivnenskiy stock-manufacturing and marketing combine "	Підприємство споживчої кооперації "Рівненський заготівельно-виробничо-збутовий комбінат"	less than 50 mln. UAH
	35027102	"VKF Velykom" LLC	ТОВ "ВКФ Великом"	less than 50 mln. UAH
	31729072	"Dubno conserving factory" LLC	ТОВ "Дубенський консервний завод"	less than 50 mln. UAH
	37058242	PE "JOF"	ПП "ДЖОФ"	less than 50 mln. UAH
	37352442	PE "Dubno cannery"	ПП "Дубенський консервний завод"	less than 50 mln. UAH
	31383229	Firm Resource-Invest LLC	ТОВ - фірма "Ресурс-Інвест"	less than 50 mln. UAH
	22566274	Agricultural enterprise "Atena" LLC	ТОВ сільськогосподарське підприємство "Атена"	less than 50 mln. UAH
Zakarpattia region	35771408	"Fruit Master Foods" LLC	ТОВ "Фрут Майстер Фудс"	50-100 mln. UAH
	22106561	Small PE "Kolosok"	Мале приватне підприємство "Колосок"	less than 50 mln. UAH
	32315689	"Korado Canning Inc." LLC	ТОВ "Корадо Каннінг Інкорпорейтед"	less than 50 mln. UAH
	32218536	Univer Canning Plant LLC	ТОВ "Консервний Завод "Універ"	less than 50 mln. UAH
	40012142	"AVE-Grup Plyus" LLC	ТОВ "АВЕ-Груп Плюс"	less than 50 mln. UAH
	30496841	"Diadia Vania Zakarpatski Ovochi" LLC	ТОВ "Дядя Ваня-Закарпатські Овочі"	less than 50 mln. UAH
	40012053	"Agroekulgrup" LLC	ТОВ "Агроекулгруп"	less than 50 mln. UAH

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	38456188	"Starline Foods Trading" LLC	ТОВ "Старлайн Фудс Трейдинг"	less than 50 mln. UAH
	30756799	Farming enterprise "Galla"	СФГ "Галла"	less than 50 mln. UAH
	14352576	"Karpaten Bolet" LLC	ТОВ "Карпатен Болет"	less than 50 mln. UAH
Volyn region	31120537	Farming enterprise "Zolota Niva"	СФГ "Золота Нива"	less than 50 mln. UAH
	33587784	"Prodholod-M" LLC	ТОВ "Продхолод-М"	less than 50 mln. UAH
	31462284	"Agrofrukt" LTD. LLC	ТОВ "Агрофрукт" ЛТД	less than 50 mln. UAH
	34516054	"Emita" LLC	ТОВ "Еміта"	less than 50 mln. UAH
	33667508	"Darlisad" LLC	ТОВ "Дарлісад"	less than 50 mln. UAH
	36541208	PE "Demidivsky canned factory"	ПП "Демидівський консервний завод"	less than 50 mln. UAH
	38428577	"Invita Frost" LLC	ТОВ "Інвіта Фрост"	less than 50 mln. UAH
	32403229	Subsidiary enterprise "BERICA"	Дочірнє підприємство "БЕРІКА"	less than 50 mln. UAH
	5527752	PJSC "Volodymyr-Volynskiy cannery "	ПАТ "Володимир-Волинський консервний завод"	less than 50 mln. UAH

### Key obstacles observed in the sector

While identifying main obstacles for the development of processing and preserving of fruit and vegetables enterprises in Western Ukrainian regions 21 companies were contacted, of which 14 (67%) agreed to participate in the survey, and 7 (33%) refused. The following figure shows a rating of the obstacles as perceived by enterprises.



**Fig. 2.50. A rating of main obstacles for the development of processing and preserving of fruit and vegetables enterprises in Western Ukrainian regions**

The Ukrainian fruit and vegetables production and processing sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of



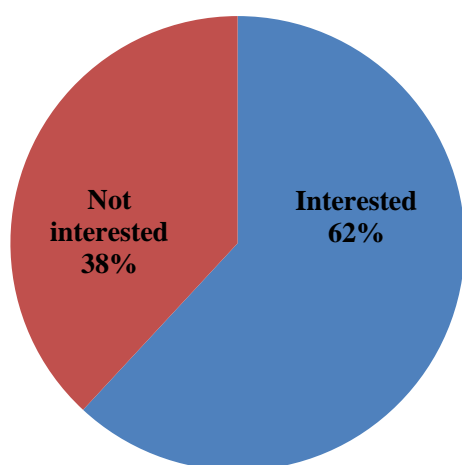
government support (57%), inaccessibility of funding (57%) and regulations or raider attacks (36%).

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 has adopted international quality standards (such as ISO 22000, HACCP). Smaller companies lack the implementation of such standards, due to lack of financing.

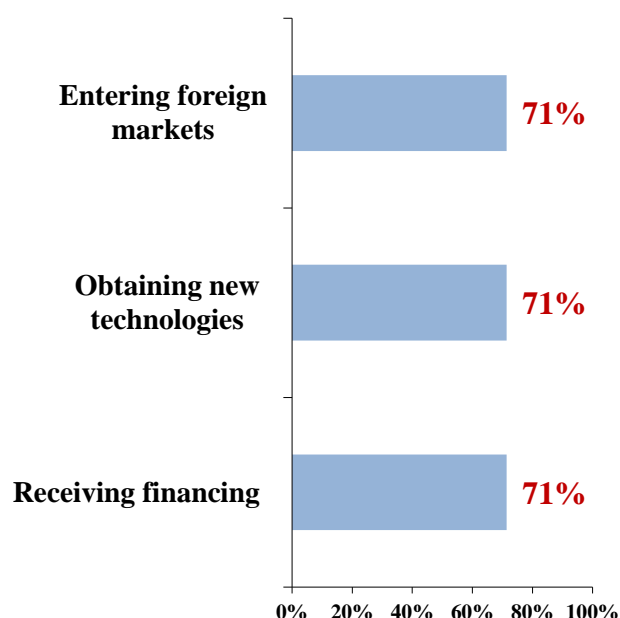
Lack of government support is ranked second among challenges. Lack of state export promotion in fresh fruit and vegetable sectors. The sector is hardly supported by the government.

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, about 62% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in obtaining new technologies (71%), entering foreign markets (71%) and receiving financing (71%).



**Fig. 2.51. The interest of processing and preserving of fruit and vegetables enterprises in cooperation with the Dutch business**



**Fig. 2.52. Main areas of potential cooperation with the Dutch business in the processing and preserving of fruit and vegetables, %**

### 3. Industrial Sectors. Detailed sectoral analysis

#### 3.1. Manufacture of chemicals and chemical products

##### General overview of the sector

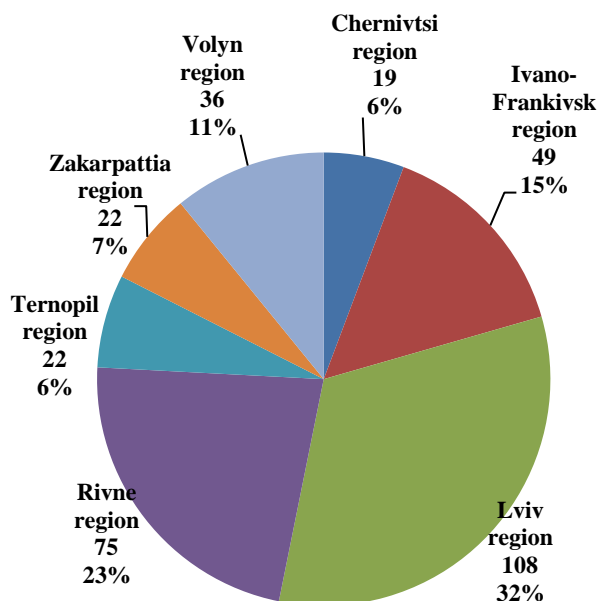
In Western Ukrainian regions, there are 331 enterprises producing chemicals, of which 174 are legal entities (53%), and 157 - individual entrepreneurs (43%).

The largest number of companies operates in Lviv region (108 units or 32%), and the least - in Chernivtsi region (19 units or 6%).

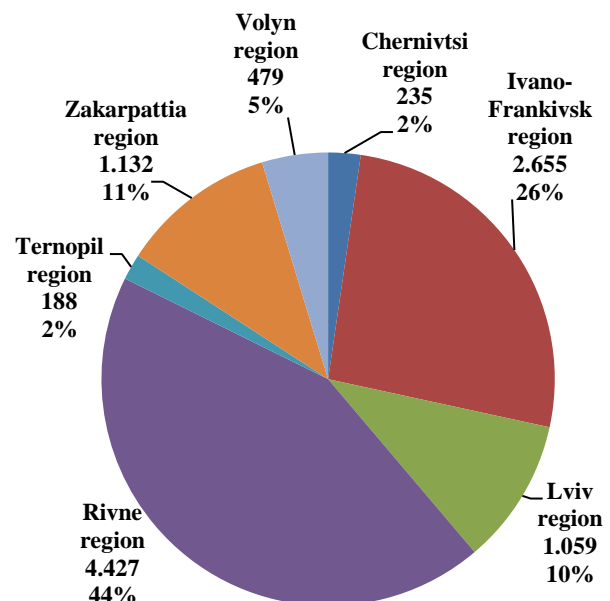
The sector is employing 10 175 full-time employees, including 9 904 in legal entities (97%), and 271 are employed by individual entrepreneurs (about 3%). The sector's leader by the number of employees is Rivne region (4 427 people or almost 44%), while the smallest employment in the sector is in Ternopil region (188 people or almost 2%).

**Table 3.1. Number of functioning enterprises and employment in manufacture of chemicals and chemical products in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	11	8	19	219	16	235
Ivano-Frankivsk region	32	17	49	2 631	24	2 655
Lviv region	60	48	108	968	91	1 059
Rivne region	29	46	75	4 357	70	4 427
Ternopil region	11	11	22	171	17	188
Zakarpattia region	12	10	22	1 111	21	1 132
Volyn region	19	17	36	447	32	479
<b>Total West Ukraine regions</b>	<b>174</b>	<b>157</b>	<b>331</b>	<b>9 904</b>	<b>271</b>	<b>10 175</b>



**Fig. 3.1. Breakdown of manufacture of chemicals and chemical products enterprises by regions, units.**



**Fig. 3.2. Regional employment structure in manufacture of chemicals and chemical products, people**

## Sales

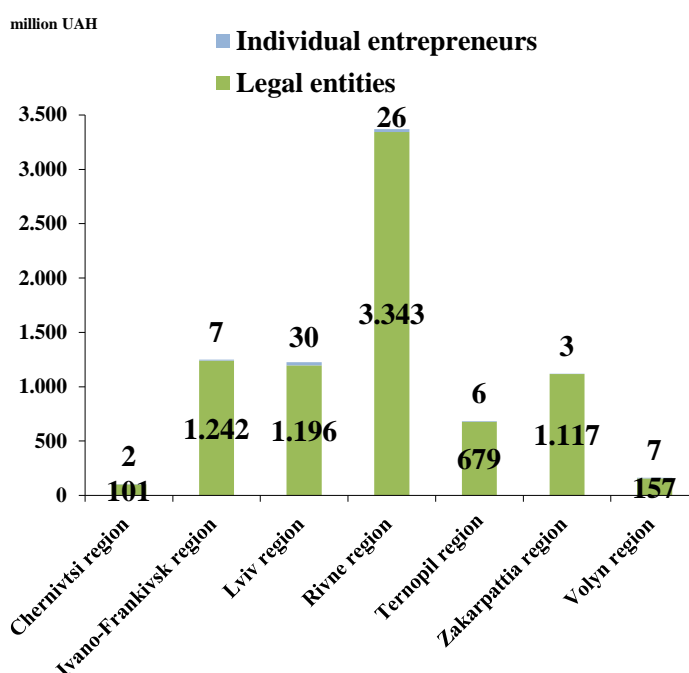
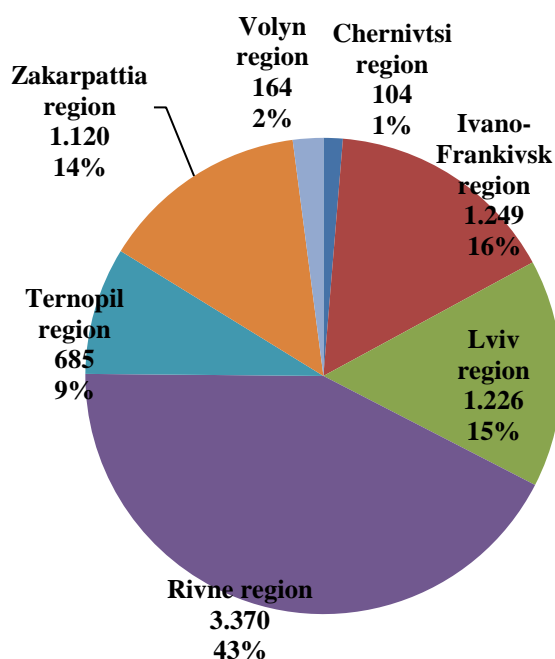
In 2016, sales volume of chemical enterprises amounted to about UAH 7 916 million, of which UAH 7 835 million were generated by legal entities (about 99%), and the rest UAH 81 million – by individual entrepreneurs (about 1%).

In the regional structure, the leaders are Rivne region (UAH 3 370 million or 43% of sales), Ivano-Frankivsk region (UAH 1 249 million or 16%) and Lviv region (UAH 1 226 million or 15%). Together, these regions account for more than 74% of chemical products sales among Western Ukrainian regions.

According to the results of companies' survey, the average level of sales through retail networks in chemical products production is about 14%.

**Table 3.2. The volume of sales of manufacture of chemicals and chemical products in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	101,3	2,3	103,6
Ivano-Frankivsk region	1 241,8	7,1	1 248,9
Lviv region	1 195,8	30,0	1 225,8
Rivne region	3 343,5	26,1	3 369,6
Ternopil region	678,5	6,2	684,7
Zakarpattia region	1 116,8	3,0	1 119,8
Volyn region	156,9	6,6	163,5
<b>Total West Ukraine regions</b>	<b>7 834,6</b>	<b>81,4</b>	<b>7 915,9</b>



**Fig. 3.3. Regional sales of manufacture of chemicals and chemical products, million UAH**

**Fig. 3.4. Regional sales of manufacture of chemicals and chemical products by type of business entity, million UAH**

**Export**

In 2016, the volume of chemical products exports in Western Ukrainian regions amounted to about USD 86.8 million, of which almost 57% was generated by Rivne region (USD 27.8 million) and 43% was generated by Zakarpattia region (USD 21.6 million).

Albuminoidal substances, modified starches and glues dominate in the commodity structure of exports (55% of total exports of the sector).

**Table 3.3. The volume of chemical products export in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Albuminoidal substances; modified starches; glues; enzymes		2 736	104	4 526	9 536	32	3 810	20 744
Essential oils and resinoids; perfumery, cosmetic or toilet preparations	359		1 507	24		10 476	839	13 205
Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations				546				546
Fertilisers				21 950				21 950
Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals	162	5 748	132	88				6 130
Miscellaneous chemical products		445	1 513	23	116	37	27	2 161
Organic chemicals	36	573	351	74	23	10 040	117	11 214
Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes, polishing or scouring preparations, candles and similar articles, modelling pastes	528	1 998	3 717	21		911	425	7 601
Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring		286	1 994	326		86	517	3 208
<b>Total</b>	<b>1 085</b>	<b>11 787</b>	<b>9 318</b>	<b>27 577</b>	<b>9 676</b>	<b>21 582</b>	<b>5 735</b>	<b>86 759</b>

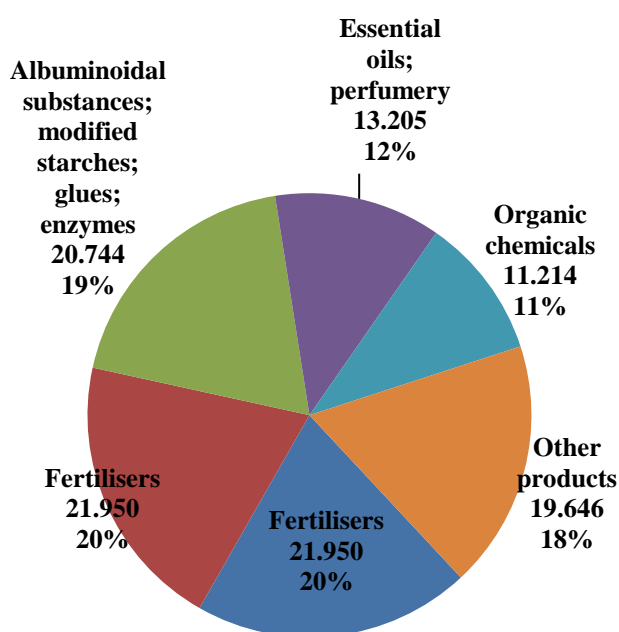


Fig. 3.5. Export goods structure of chemical products by subsectors, thousand USD

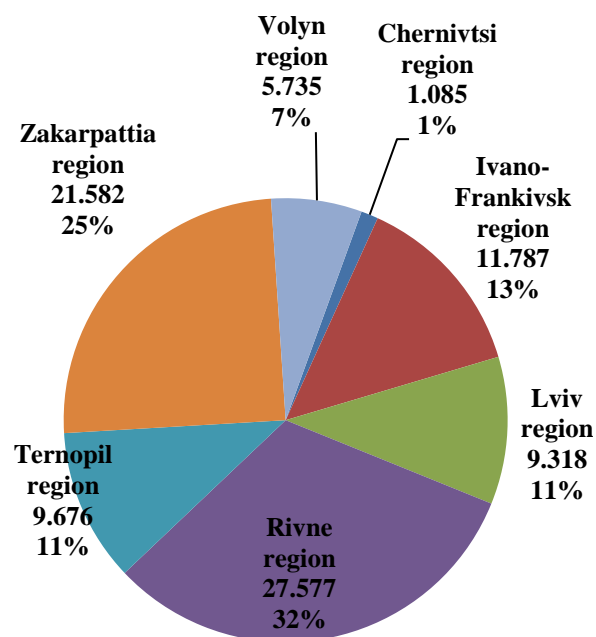


Fig. 3.6. Regional breakdown of chemical products export, thousand USD

### Leading companies of the sector

The main manufacture of chemicals and chemical products in the Western Ukrainian regions are PJSC "Rivneazot", "Perechyn wood-chemical plant" ALC and "Sniezka-Ukraine" LLC.

Table 3.4. Leading chemicals and chemical products producers

ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
5607824	PJSC "Rivneazot"	ПАТ "Рівнеазот"	Fertilizers	more than 100 mln. UAH
274105	"Perechyn wood-chemical plant" ALC	ТДВ "Перечинський лісохімічний комбінат"	Carbamide-formaldehyde resins	more than 100 mln. UAH
30648854	"Sniezka-Ukraine" LLC	ТОВ "Сніжка-Україна"	Paint and varnish products	more than 100 mln. UAH
30408081	"Padana Kemikal Kompanuds" LLC	ТОВ "Падана Кемікал Компанудс"	PVC mixed with other substances in primary forms	more than 100 mln. UAH
34022671	"Interfil" LLC	ТОВ "Інтерфіл"	Detergents, perfumes	more than 100 mln. UAH
33578130	"Karpatsmoly" LLC	ТОВ "Карпатсмоли"	Carbamide-formaldehyde resins	more than 100 mln. UAH
32413704	"Ukrainian match factory " LLC	ТОВ "Українська сірникова фабрика"	Chemical substances	more than 100 mln. UAH
33519248	"Research and Production Enterprise Grifskand-Svaliava " LLC	ТОВ "НВП "Грифсканд-Сваліява"	Charcoal	more than 100 mln. UAH
32257423	PrJSC "Fine organic synthesis plant" Barva "	ПрАТ "завод тонкого органічного синтезу "Барва"	Detergents, dyes	more than 100 mln. UAH
33578214	"Polikem" LLC	ТОВ "Полікем"	Plasticizers for rubber and plastics	more than 100 mln. UAH

Regional distribution of the largest companies in the sector is shown in Table 3.5.

**Table 3.5. Top-10 companies-producers of chemicals and chemical products by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
Chernivtsi region	38596065	"Himservisgrup" LLC	ТОВ "Хімсервісгруп"	Acrylic polymers in primary forms, detergents	25-50 mln. UAH
	204665	"Chernivtsi Chemical Factory" ALC	ТДВ "Чернівецький Хімічний Завод"	Paint and varnish products	25-50 mln. UAH
	32572871	"Aroma Parfum" LLC	ТОВ "Арома Парфюм"	Perfumes and eau de toilette	less than 25 mln. UAH
	34519139	"Gas Sector" LLC	ТОВ "Сектор Газу"	Industrial gases	less than 25 mln. UAH
	38535919	"Klin Tim" LLC	ТОВ "Клін Тім"	Detergents and soap	less than 25 mln. UAH
	22846306	"Kolor" LLC	ТОВ "Колор"	Paint and varnish products	less than 25 mln. UAH
	36325596	"Chernivtsipobuthim" LLC	ТОВ "Чернівціпобутхім"	Detergents and soap	less than 25 mln. UAH
	34324467	PE with foreign investment "Nizal"	ППІ з іноземними інвестиціями "Низал"	Chemical substances	less than 25 mln. UAH
	22851307	Small collective enterprise firm "Gavas"	МКП ФІРМА "Гавас"	Paint and varnish products	less than 25 mln. UAH
	2972411	Collective Production-Trading Enterprise "Pobutova Khimia"	Колективне Виробничо-Торгівельне Підприємство "Побутова Хімія"	Detergents, perfumes	less than 25 mln. UAH
37646937	"Maxmart" LLC	ТОВ "Максмарт"	Cosmetics, shampoos	less than 25 mln. UAH	
Ivano-Frankivsk region	30408081	"Padana Kemikal Kompanuds" LLC	ТОВ "Падана Кемікал Компаундс"	PVC mixed with other substances in primary forms	more than 100 mln. UAH
	33578130	"Karpatsmoly" LLC	ТОВ "Карпатсмоли"	Carbamide-formaldehyde resins	more than 100 mln. UAH
	32257423	PrJSC "Fine organic synthesis plant" Barva "	ПрАТ "Завод Тонкого Органічного Синтезу "Барва"	Detergents, dyes	more than 100 mln. UAH
	33578214	"Polikem" LLC	ТОВ "Полікем"	Plasticizers for rubber and plastics	more than 100 mln. UAH
	37130116	"Orisil Factory" LLC	ТОВ "Завод ДК Орисіл"	Silicon dioxide	50-100 mln. UAH
	5540209	State Enterprise "Kalush Research-Experimental Factory Of Institute Of Surface Chemistry of the National Academy Of Sciences of Ukraine"	Дп "Калуський дослідно-експериментальний завод Інституту Хімії Поверхні Національної Академії Наук України"	Silicon dioxide	50-100 mln. UAH
	32121793	"Firm Himeks" LLC	ТОВ "Фірма Хімекс"	Chemical additives	25-50 mln. UAH
33129683	"Karpatnaftokhim" LLC	ТОВ "Карпатнафтохім"	PVC in primary forms, polyethylene in primary forms	25-50 mln. UAH	

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Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
	25069903	"Galhimservice" LLC	ТОВ "Галхімсервіс"	Plasticizers for rubber and plastics	less than 25 mln. UAH
	32355454	"Gold Drop-Ukraine" LLC	ТОВ "Голд Дроп-Україна"	Detergents	less than 25 mln. UAH
Ternopil region	375065	State Enterprise "Zarubinskiy spirt factory"	ДП "Зарубинський Спиртовий Завод"	Ethyl alcohol	50-100 mln. UAH
	34905652	PE "Zakhidpak"	ПП "Західпак"	Packing made of polyethylene	less than 25 mln. UAH
	39307653	"Pyroliz Group" LLC	ТОВ "Піроліз Груп"	Charcoal	less than 25 mln. UAH
	35157658	"Respect Kolor" LLC	ТОВ "Респект Колор"	Paint and varnish products	less than 25 mln. UAH
	30903604	Ozon LKHZ LLC	ТОВ "Озон ЛХЗ"	Industrial gases	less than 25 mln. UAH
	39849708	"Ninti" LLC	ТОВ "Нінті"	Pesticides	less than 25 mln. UAH
	38194982	"Ekoflex" LLC	ТОВ "Екофлекс"	Paint and varnish products	less than 25 mln. UAH
Lviv region	30648854	"Sniezka-Ukraine" LLC	ТОВ "Сніжка-Україна"	Paint and varnish products	more than 100 mln. UAH
	33894650	"Links Laboratory" LLC	ТОВ "Лінкс Лабораторії"	Autocosmetics	more than 100 mln. UAH
	5761873	PJSC "Lviv Chemical Factory"	ПАТ "Львівський Хімічний Завод"	Industrial gases	50-100 mln. UAH
	30823126	"Stahema Lviv-Service" LLC	ТОВ "Стахема Львів-Сервіс"	Antiseptics	50-100 mln. UAH
	23956161	Ukrainian-Great British Plastresures Company LLC	ТОВ Українсько-Великобританське Спільне Підприємство "Пластресурс"	Plastics	less than 50 mln. UAH
	32053870	"Lvivkysen" Firm LLC	ТОВ Фірма "Львівкісень"	Industrial gases	less than 50 mln. UAH
	40100940	"Vemako" LLC	ТОВ "Вемако"	Varnish and paint products	less than 50 mln. UAH
	31215320	"The World Of Chemistry" LLC	ТОВ "Світ Хімії"	Household chemicals	less than 50 mln. UAH
	30909737	"Gallera" LLC	ТОВ "Галтерра"	Perfumery	less than 50 mln. UAH
	30665382	"Dobromil-Yavoriv" LLC	ТОВ "Доброміль-Яворів"	Melted sulfur	less than 50 mln. UAH
Rivne region	5607824	PJSC "Rivneazot"	ПАТ "Рівнеазот"	Fertilizers	more than 100 mln. UAH
	32413704	"Ukrainian match factory" LLC	ТОВ "Українська сірникова фабрика"	Chemical Industry	more than 100 mln. UAH
	31299514	"Kolor S.I.M." LLC	ТОВ "Колор С.І.М."	Varnish and paint products	more than 100 mln. UAH
	375036	State Enterprise "Zirrenskiy Spirt Factory"	Державне Підприємство "Зіренський Спиртовий Завод"	Ethanol	50-100 mln. UAH
	37685405	"Mineral-Grup" LLC	ТОВ "Мінерал-Груп"	Fertilizers	less than 50 mln. UAH
	32451362	- "Agrohimpac" Firm LLC	ТОВ - Фірма "Агрохімпак"	Fertilizers	less than 50 mln. UAH
	39322540	"Karponis" LLC	ТОВ "Карбоніс"	Charcoal	less than 50 mln. UAH
	30946915	"Ukrtehnofos" LLC	ТОВ "Укртехнофос"	Fertilizers	less than 50 mln. UAH

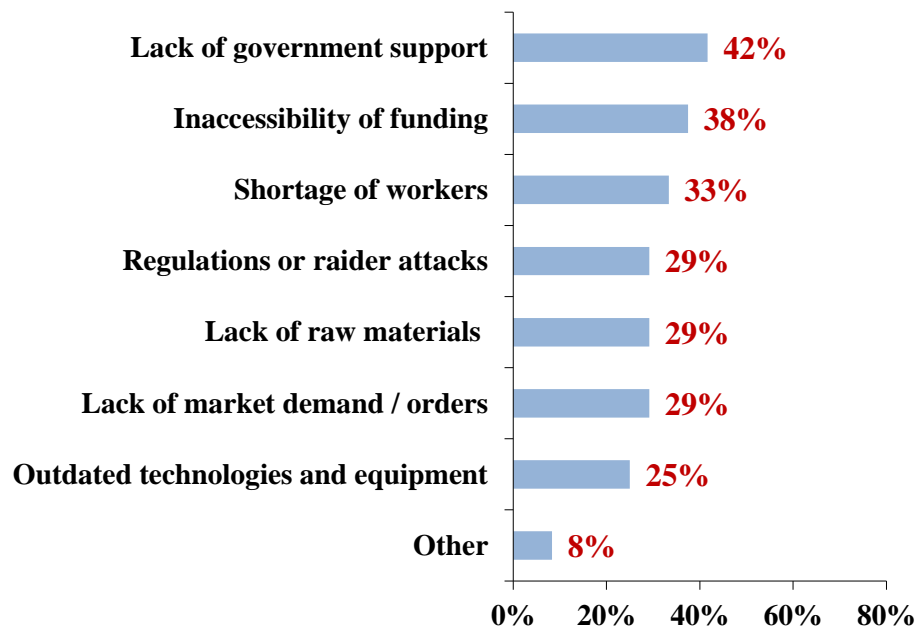


Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
					UAH
	13977564	Scientific-manufacturing enterprise "Mistim" LLC	ТОВ НВП "Містім"	Concrete and concrete products	less than 50 mln. UAH
	38247819	PE "Tikva"	ПП "Тиква"	Goods for the garden and the city	less than 50 mln. UAH
Zakarpattia region	274105	"Perechyn wood-chemical plant " ALC	ТДВ "Перечинський лісохімічний комбінат"	Carbamide-formaldehyde resins	more than 100 mln. UAH
	34022671	"Interfil" LLC	ТОВ "Інтерфіл"	Detergents, perfumes	more than 100 mln. UAH
	33519248	"Research and Production Enterprise Grifskand-Svaliava" LLC	ТОВ "НВП "Грифсканд-Свалява"	Charcoal	more than 100 mln. UAH
	39328584	"VS-Еко-Технологія" LLC	ТОВ "ВС-Еко-Технологія"	Charcoal	less than 50 mln. UAH
	31399506	Farming enterprise "Martinka"	ФГ "Мартинка"	Chemical substances	less than 50 mln. UAH
	39202517	"Karpathim" LLC	ТОВ "Карпатхім"	Chemical substances	less than 50 mln. UAH
	22095573	"Orion" LLC	ТОВ "Оріон"	Chemical substances	less than 50 mln. UAH
	37916798	"Zakarpattya-Treyd" LLC	ТОВ "Закарпаття-Трейд"	Chemical substances	less than 50 mln. UAH
	22075062	"VIA" LLC	ТОВ "ВІА"	Chemical substances	less than 50 mln. UAH
	36357633	"Tekhnokristal-Korund" LLC	ТОВ "Технокристал-Корунд"	Chemical substances	less than 50 mln. UAH
Volyn region	32831296	PJSC "Western Industrial Group"	ПрАТ "Західна Промислова Група"	Varnish and paint products	50-100 mln. UAH
	31602868	"Sky" LLC	ТОВ "Скай"	Cosmetics, perfumes	less than 50 mln. UAH
	31496821	"Edem" LLC	ТОВ "Едем"	Varnish and paint products	less than 50 mln. UAH
	13362727	"Viki" LLC	ТОВ "Вікі"	Cosmetics, perfumes	less than 50 mln. UAH
	35900629	"Trade House" OF Ecotechnology LLC	ТОВ "Торговий Дім "Екотехнології"	Chemical substances	less than 50 mln. UAH
	31881215	"Volynkysen LKH" LLC	ТОВ "Волинькисень ЛХЗ"	Industrial gases	less than 50 mln. UAH
	38592757	"Plastprodukt" LLC	ТОВ "Пластпродукт"	Artificial fibers	less than 50 mln. UAH
	39858885	"SM-HIM" LLC	ТОВ "СМ-ХІМ"	Household chemicals	less than 50 mln. UAH
	33579789	"Zender-Ukraine LLC "	ТОВ "Зендер-Україна"	Fertilizers	less than 50 mln. UAH
	39699362	"Ayuna-Ukraine" LLC	ТОВ "Аюна-Україна"	Cosmetics, perfumes	less than 50 mln. UAH



**Key obstacles observed in the sector**

While identifying main obstacles for the development of manufacture of chemicals and chemical products in the Western Ukrainian regions 41 companies were contacted, of which 24 (59%) agreed to participate in the survey, and 17 (41%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 3.7. The rating of main obstacles for the development of manufacture of chemicals and chemical products industry in Western Ukrainian regions**

The Ukrainian chemical products sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: lack of government support (42%), inaccessibility of funding (38%), shortage of workers (33%) and regulations or raider attacks (29%).

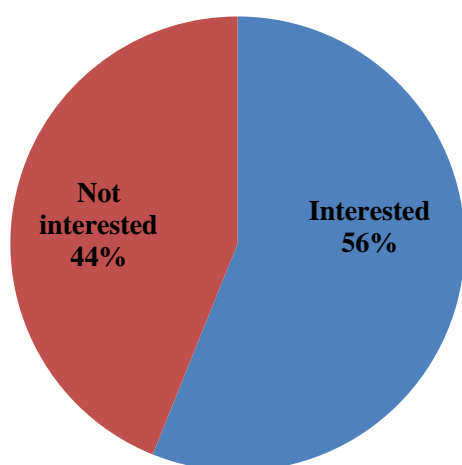
The main part of chemical production in the regions is old Soviet-type plants that require modernization of equipment, which in turn requires affordable long-term financing, with a loan rate of <10% per annum for at least 3 years.

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

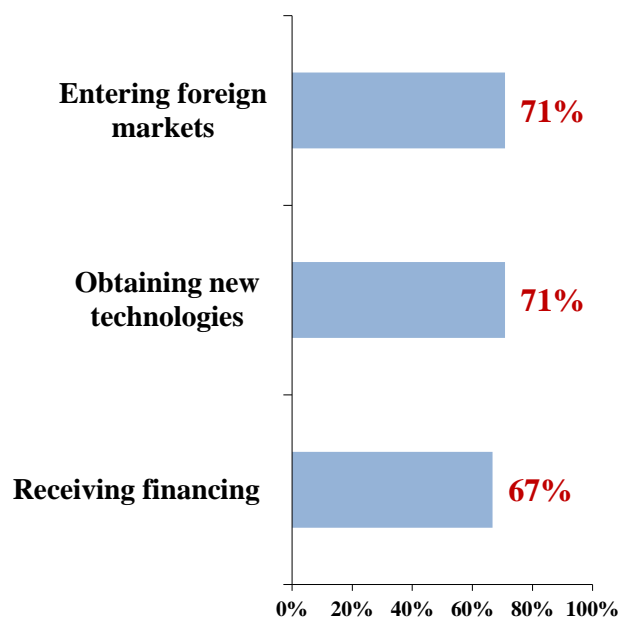
Chemical production is lacking in domestic raw materials, which they are forced to import. Low import duties and the absence of technical policy (quality control) lead to the dominance of import products at dumped prices of dubious quality, primarily from China and the countries of

Southeast Asia. This applies to both basic chemical products (PVC, polyethylene, polypropylene) and final chemical products (pesticides, formaldehyde resins, inorganic acids).

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 56% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in obtaining new technologies (71%), entering foreign markets (67%) and receiving financing (75%).



**Fig. 3.8. The interest of manufacture of chemicals and chemical products enterprises in cooperation with the Dutch business**



**Fig. 3.9. Main areas of potential cooperation with the Dutch business in the manufacture of chemicals and chemical products, %**

### 3.2. Manufacture of rubber and plastic products

#### General overview of the sector

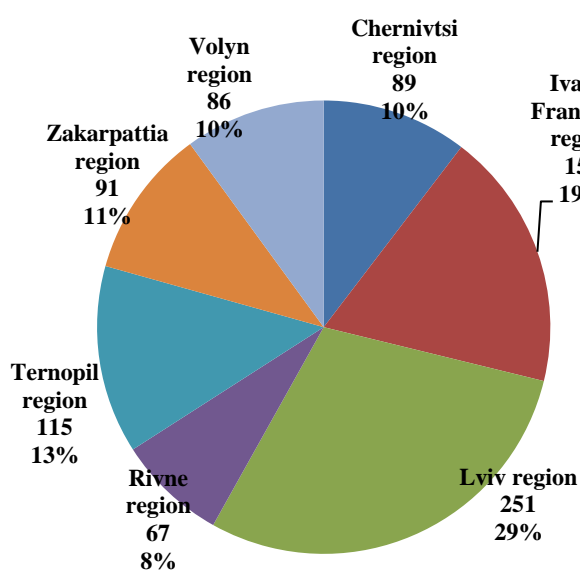
In Western Ukrainian regions, there are 857 enterprises producing rubber and plastic products, of which 331 are legal entities (39%), and 526 - individuals entrepreneurs (61%).

The largest number of companies operates in the Lviv region (251 units or 29%), and the least – in Rivne region (67 units or 8%).

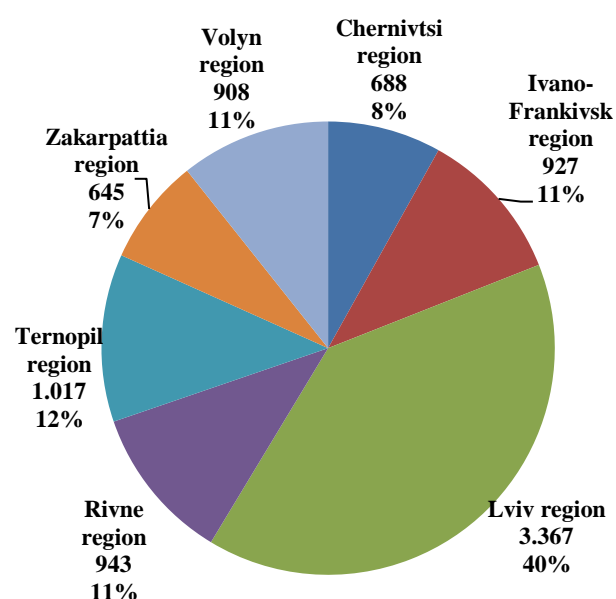
The sector is employing 8 495 full-time employees, including 7 331 in legal entities (86%), and 1 164 are employed by individual entrepreneurs (about 14%). The sector's leader by the number of employees is Lviv region (3 367 people or almost 40%), while the smallest employment in the sector is in Zakarpattia region (645 people or almost 7%).

**Table 3.6. Number of functioning enterprises and employment in manufacture of rubber and plastic products in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	21	68	89	553	135	688
Ivano-Frankivsk region	48	110	158	692	235	927
Lviv region	131	120	251	3 122	245	3 367
Rivne region	30	37	67	819	124	943
Ternopil region	34	81	115	831	186	1 017
Zakarpattia region	24	67	91	515	130	645
Volyn region	43	43	86	799	109	908
<b>Total West Ukraine regions</b>	<b>331</b>	<b>526</b>	<b>857</b>	<b>7 331</b>	<b>1 164</b>	<b>8 495</b>



**Fig. 3.10. Breakdown of manufacture of rubber and plastic products enterprises by regions, units**



**Fig. 3.11. Regional employment structure in manufacture of rubber and plastic products, people**

## Sales

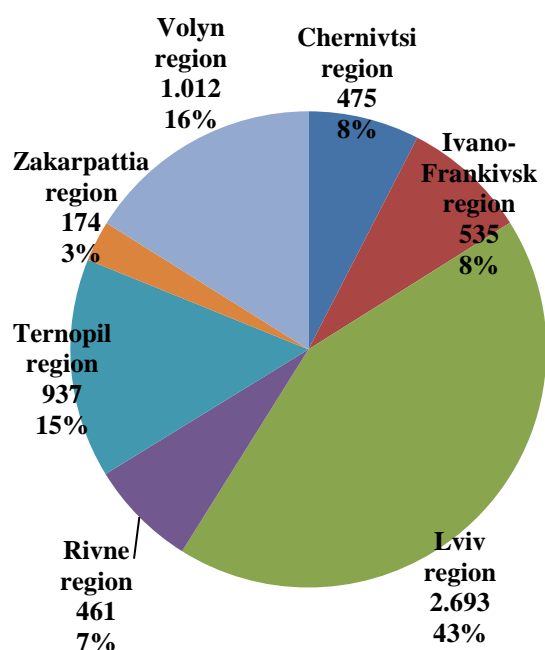
In 2016, sales volume of rubber and plastic products amounted to about UAH 6 287 million, of which UAH 5 965 million were generated by legal entities (95%), and the rest UAH 322 million – by individual entrepreneurs (about 5%).

In the regional structure, the leaders are Lviv region (UAH 2 693 million or 43% of sales), Volyn region (UAH 1 012 million or 16%) and Ternopil region (UAH 937 million or 15%). Together, these regions account for more than 74% of rubber and plastic products sales among Western Ukrainian regions.

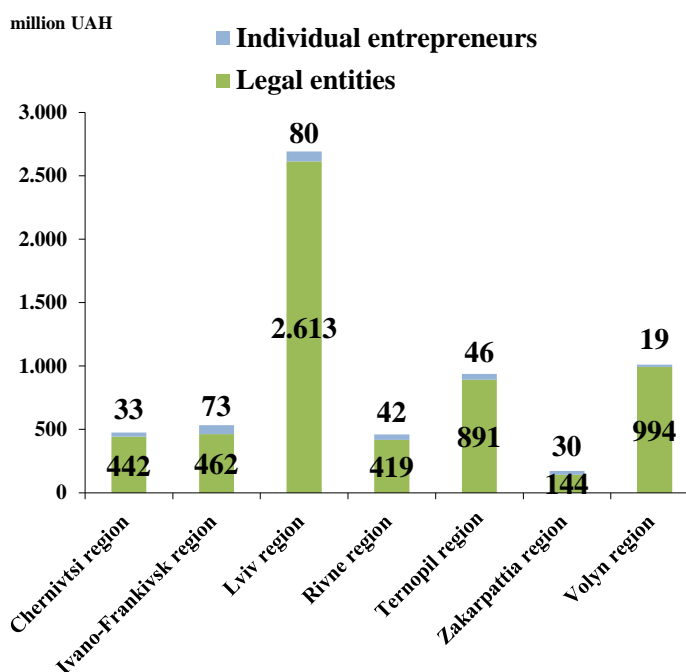
According to the results of companies' survey, the average level of sales through retail networks in rubber and plastic production is about 10%.

**Table 3.7. The volume of sales of rubber and plastic products enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	441,9	33,4	475,3
Ivano-Frankivsk region	462,3	72,8	535,2
Lviv region	2 613,3	79,8	2 693,1
Rivne region	418,5	42,1	460,7
Ternopil region	891,4	45,7	937,1
Zakarpattia region	143,7	29,9	173,6
Volyn region	993,7	18,7	1 012,4
<b>Total West Ukraine regions</b>	<b>5 964,9</b>	<b>322,4</b>	<b>6 287,3</b>



**Fig. 3.12. Regional sales of rubber and plastic products enterprises, million UAH**



**Fig. 3.13. Regional sales of rubber and plastic products by type of business entity, million UAH**

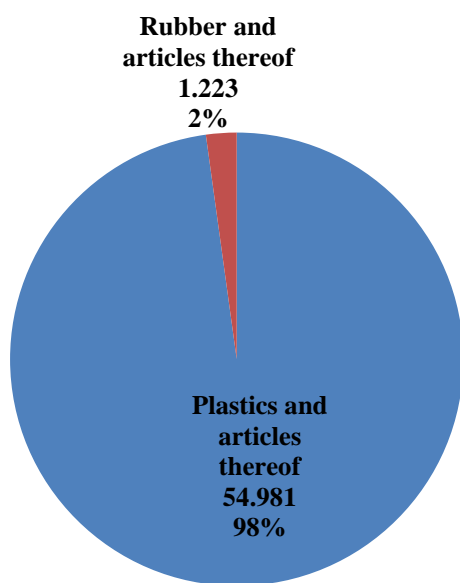
**Export**

In 2016, the volume of rubber and plastic products exports in Western Ukrainian regions amounted to about USD 25.6 million, of which almost 62% was generated by Ivano-Frankivsk region (USD 20.3 million) and Volyn region (USD 14.7 million).

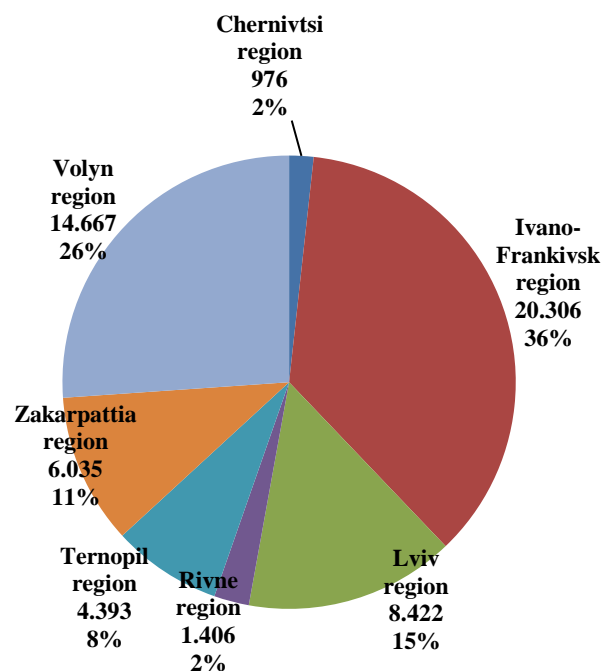
Plastics dominate in the commodity structure of exports (98% of total exports of the sector).

**Table 3.8. The volume of export by the companies manufacturing rubber and plastic products in 2016, thousand USD**

Sector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Plastics and articles thereof	976	19 992	8 171	1 231	4 393	5 587	14 631	54 981
Rubber and articles thereof		314	251	175		447	36	1 223
<b>Total</b>	<b>976</b>	<b>20 306</b>	<b>8 422</b>	<b>1 406</b>	<b>4 393</b>	<b>6 035</b>	<b>14 667</b>	<b>56 204</b>



**Fig. 3.14. Export of rubber and plastic products by subsectors, thousand USD**



**Fig. 3.15. Regional breakdown of rubber and plastic products export, thousand USD**

**Leading companies of the sector**

The main manufacturers of rubber and plastic products in Western Ukrainian regions are PrJSC "Joint Ukrainian-Slovak Company" Terichem-Lutsk", "Terviknoplast" LLC and "Polikom" LLC.

**Table 3.9. Leading rubber and plastic products producers**

<b>ID code</b>	<b>Company name (English)</b>	<b>Company name (Ukrainian)</b>	<b>Product</b>	<b>Revenues</b>
25093118	PrJSC "Joint Ukrainian-Slovak Company" Terichem-Lutsk "	ПрАТ "Спільне Українсько-Словацьке Підприємство "Теріхем-Луцьк"	Packing and heat shrinkfilms	more than 100 mln. UAH
33992917	"Terviknoplast" LLC	ТОВ "Тервікнопласт"	Windows and doors of metal-plastic	more than 100 mln. UAH
24681750	"Polikom" LLC	ТОВ "Поліком"	Paint and varnish products, carbamide formaldehyde resins, detergents	more than 100 mln. UAH
30336890	Corporation "Energoresurs-Invest"	Корпорація "Енергоресурс-Інвест"	Plastics	more than 100 mln. UAH
35855828	"Interfom-Zakhid" LLC	ТОВ "Інтерфом-Захід"	Sheets, polyurethane tapes	more than 100 mln. UAH
22412950	"Joint Ukrainian-Canadian Enterprise" Rosanpak" LLC	ТОВ "Спільне Українсько-Канадське Підприємство "Росанпак"	Plastic packaging	more than 100 mln. UAH
25230066	"Ukrspetstechnika" LLC	ТОВ "Укрспецтехніка"	Polypropylene	more than 100 mln. UAH
34103692	"Kenner-Ukraine" LLC	ТОВ "Кеннер-Україна"	Products from plastic	more than 100 mln. UAH
38178714	PE "Fabryka Vikon Lux"	ПП "Фабрика Вікон Люкс"	Windows and doors of metal-plastic	more than 100 mln. UAH
13822324	PE Production Firm"AST"	Приватне Підприємство Виробнича Фірма "АСТ"	Plastic containers	more than 100 mln. UAH

Regional distribution of the largest companies in the sector are shown in Table 3.10.

Table 3.10. Top-10 companies-producers of rubber and plastic products by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
Chernivtsi region	38178714	PE "Fabryka Vikon Lux"	ПП "Фабрика Вікон Люкс"	Windows and doors of metal-plastic	more than 100 mln. UAH
	22846068	"Obltorgservis LLC"	ТОВ "Облторгсервіс"	Windows and doors of metal-plastic	25-50 mln. UAH
	39172163	"Lider Styrol" LLC	ТОВ "Лідер Стирол"	Plates, sheets, polystyrene foil	25-50 mln. UAH
	14346989	PE "Intergarant"	ПП "Інтергарант"	Windows and doors of metal-plastic	less than 25 mln. UAH
	34853149	"Vikna Styl Trading" LLC	ТОВ "Вікна Стиль Трейдинг"	Windows and doors of metal-plastic	less than 25 mln. UAH
	14266196	Production-Commercial Company Zoloty Kolosok	"Виробничо-Торгово Комерційна Фірма Золотий Колосок"	Windows and doors of metal-plastic	less than 25 mln. UAH
	32572714	"Benantkom" LLC	ТОВ "Бенантком"	Boots, bottles, plastic crates	less than 25 mln. UAH
	30208458	"Kondor Plast" LLC	ТОВ "Фірма Офіцерів Запасу України "Кондор-Пласт"	Packing twine made of polyethylene and polypropylene	less than 25 mln. UAH
	14264122	Small Collective Enterprise "Rhythm"	МКП "Ритм"	Plates, sheets, plastic tape	less than 25 mln. UAH
	35891431	PE "Soleks Engineering"	ПП "Солекс Інжиніринг"	Windows and doors of metal-plastic	less than 25 mln. UAH
Ivano-Frankivsk region	24681750	"Polikom" LLC	ТОВ "Поліком"	Paint and varnish products, carbamide-formaldehyde resins, detergents	more than 100 mln. UAH
	31400590	"Elips" LLC	ТОВ "Еліпс"	Boots, bottles, plastic crates	50-100 mln. UAH
	35615975	"Kalush Pipeline Factory" LLC	ТОВ "Калушський Трубний Завод"	Polymer pipes	25-50 mln. UAH
	38554931	"Pershy Vikonny Zavod IF" LLC	ТОВ "Перший Віконний Завод ІФ"	Windows and doors of metal-plastic	25-50 mln. UAH
	30983831	"Ziko Corporation" LLC	ТОВ "Корпорація"Зіко"	Plates, sheets, plastic tape	less than 25 mln. UAH
	25072437	"Lychakivsky Lev" LLC	ТОВ "Личаківський Лев"	Boots, bottles, plastic bottles	less than 25 mln. UAH
	13646867	"Orion" LLC	ТОВ "ОРИОН"	Plates, sheets, plastic tape	less than 25 mln. UAH
	37595819	"Vigor TM" LLC	ТОВ "ВІГОР ТМ"	Windows and doors of metal-plastic	less than 25 mln. UAH
	3112722	"Ivano-Frankivsk tire-repair plant "" LLC	ТОВ "Івано-Франківський Шиноремонтний Завод"	Rubber-technical products, resp	less than 25 mln. UAH
	35958134	Construction Industrial Company "Sigma" LLC	ТОВ Будівельна Індустріальна Компанія "СІГМА"	Windows and doors of metal-plastic	less than 25 mln. UAH
Ternopil region	33992917	"Terviknoplast" LLC	ТОВ "Тервікнопласт"	Windows and doors of metal-plastic	more than 100 mln. UAH
	35855828	"Interfom-Zakhid" LLC	ТОВ "Інтерфом-Захід"	Sheets, polyurethane tapes	more than 100 mln. UAH
	37345655	"Vikonenko" LLC	ТОВ "Віконенко"	Windows and doors of metal-plastic	50-100 mln. UAH
	31830862	"Panorama" LLC	ТОВ "Панорама"	Metal-plastic ware	25-50 mln. UAH
	37363517	"Ethera Plast" LLC	ТОВ "Етера Пласт"	Windows and doors of	less than 25

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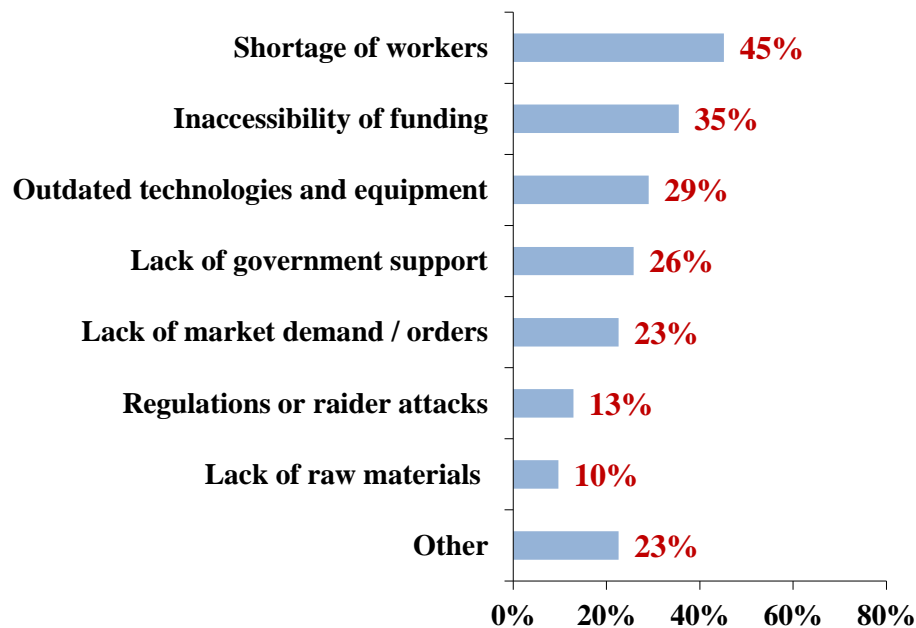
Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
				metal-plastic	mln. UAH
	32272525	"Tiso" LLC	ТОВ "Тісо"	Plates, sheets, polystyrene foil	less than 25 mln. UAH
	32291333	"Unipak-Ukraine" LLC	ТОВ "Уніпак-Україна"	Sacks and bags made of polyethylene film	less than 25 mln. UAH
	31877188	"Fero-Plast" LLC	ТОВ "Феро-Пласт"	Plates, sheets, polystyrene foil	less than 25 mln. UAH
	21157774	Production Cooperative "Delta"	Виробничий Кооператив "Дельта"	Sacks and bags made of polyethylene film	less than 25 mln. UAH
	39630342	"Plastik-M" LLC	ТОВ "Пластик-М"	Boots, bottles, bottles, plastic bottles	less than 25 mln. UAH
Lviv region	30336890	Corporation "Energoresurs-Invest"	Корпорація "Енергоресурс-Інвест"	Plastics	more than 100 mln. UAH
	22412950	"Joint Ukrainian-Canadian Enterprise" Rosanpak " LLC	ТОВ "Спільне Українсько-Канадське підприємство "Росанпак"	Plastic packaging	more than 100 mln. UAH
	25230066	"Ukrspetstechnika" LLC	ТОВ "Укрспецтехніка"	Polypropylene	more than 100 mln. UAH
	34103692	"Kenner-Ukraine" LLC	ТОВ "Кеннер-Україна"	Products from plastic	more than 100 mln. UAH
	13822324	PE Production Firm "Ast"	ПП Виробнича Фірма "Аст"	Plastic containers	more than 100 mln. UAH
	39670260	"Instalplast" LLC	ТОВ "Інсталпласт"	Products from plastic	more than 100 mln. UAH
	32561990	Subsidiary company "Ekran-Viknosvit" "Ekran" LLC	Дочірнє підприємство "Екран-Вікносвіт" ТОВ "Екран"	Plastic windows	more than 100 mln. UAH
	23957545	"Elplast-Lviv" LLC	ТОВ "Ельпласт-Львів"	Polymer pipes and fittings	more than 100 mln. UAH
	19338138	PJSC "Ukrainian-Russian Joint Venture" LAKMA "	ПрАТ "Українсько-Російське Спільне Підприємство "Лакма"	Varnish and paint products	more than 100 mln. UAH
35217535	"Termoplast Plus" LLC	ТОВ "Термопласт Плюс"	Metal-plastic windows and constructions	50-100 mln. UAH	
Rivne region	32544294	Akord-S Enterprise LLC	ТОВ Підприємство "Акорд-С"	PVC windows	more than 100 mln. UAH
	31960752	Enterprise with foreign investment "Izoterm-S" LLC	ТОВ підприємство з іноземною інвестицією "Ізотерм-С"	Polymer pipes and fittings, sheets	more than 100 mln. UAH
	2971570	PJSC "Zdolbuniv Plant Plasmaware Factory "Iskra"	ПрАТ "Здолбунівський завод пластмасових виробів "Іскра"	Polymer pipes and fittings, sheets	50-100 mln. UAH
	2971506	PJSC "Dubenskiy factory of mechanical rubber goods"	ПАТ "Дубенський завод гумово-технічних виробів"	Rubber-technical products	less than 50 mln. UAH
	32625540	"Renome-Partner" LLC	ТОВ "Реноме-Партнер"	Metal-plastic windows	less than 50 mln. UAH
	35007130	"Viknoprom" LLC	ТОВ "Вікнопром"	Metal-plastic windows	less than 50 mln. UAH
	30716625	Lonoplast Firm LLC	ТОВ - Фірма "Лонопласт"	Metal-plastic windows	less than 50 mln. UAH
	30132981	PE Firm "Aston"	ПП Фірма "Астон"	Window shutters	less than 50



Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
					mln. UAH
	35336387	PE "Megapak-West"	ПП "Мегапак-Захід"	Polyethylene products (sheets, film)	less than 50 mln. UAH
	31020891	"West Him" LLC	ТОВ "Вест Хім"	Plastic products	less than 50 mln. UAH
Zakarpattia region	36832052	"Knyppel FerpakuNG" LLC	ТОВ "Кнюппель ФерПАКУНГ"	Cases for automobiles	less than 50 mln. UAH
	35585019	"Steklolux-Uzhgorod" LLC	ТОВ "Стеклолюкс-Ужгород"	Plastic products	less than 50 mln. UAH
	32617042	"Poli-Star" LLC	ТОВ "Полі-Стар"	Plastic products	less than 50 mln. UAH
	32617126	Small PE "Polimer&K"	МПП "Полімер і К"	Plastic products	less than 50 mln. UAH
	37809569	"Ban Ukraine" LLC	ТОВ "Бан Україна"	Plastic products	less than 50 mln. UAH
	39366284	"Albbauth" LLC	ТОВ "Алббаутех"	Polypropylene products	less than 50 mln. UAH
	32636348	"Joint Ukrainian-Hungarian industrial and household enterprise "Karpap-Pak" LLC	ТОВ "Спільне Українсько-Угорське промислово-побутове підприємство "Карпат-Пак"	Plastic packaging	less than 50 mln. UAH
	292706	"Vinogradiv Plant Plastic Sanitary Ware Factory" ALC	ТДВ "Виноградівський завод пластмасових сантехнічних виробів"	Plastic products	less than 50 mln. UAH
	32890865	"Excelent" LLC	ТОВ "Екселент"	Plastic products	less than 50 mln. UAH
	34676136	"Interpack Ukraine" LLC	ТОВ "Інтерпак Україна"	Plastic containers and packaging	less than 50 mln. UAH
Volyn region	25093118	PJSC "Joint Ukrainian-Slovak company" Terichem-Lutsk "	ПрАТ "Спільне Українсько-Словацьке підприємство "Теріхем-Луцьк"	Packing and shrink films	more than 100 mln. UAH
	33559762	"Stella Pak Ukraine" LLC	ТОВ "Стелла Пак Україна"	Packaging	50-100 mln. UAH
	36959411	"Wilk Ukraine" LLC	ТОВ "Вілк Україна"	Plastic products	50-100 mln. UAH
	36484166	"Integra West" LLC	ТОВ "Інтегра Вест"	Plastic products	50-100 mln. UAH
	35353678	"Renoplast" LLC	ТОВ "Ренопласт"	Metal-plastic doors, windows, constructions	less than 50 mln. UAH
	30297417	"Himplast" LLC	ТОВ "Хімпласт"	Packing film	less than 50 mln. UAH
	33502894	"Volyn Scloplast" LLC	ТОВ "Волинь Склопласт"	Metal-plastic doors, windows, constructions	less than 50 mln. UAH
	20054570	"Alfainterplast" LLC	ТОВ "Алфайнтерпласт"	Plastic containers	less than 50 mln. UAH
	36606249	PE "Midas-Trade"	ПП "Мідас-Трейд"	Plastic containers	less than 50 mln. UAH
	21753815	PE "Iola"	ПП "Іола"	Packing film	less than 50 mln. UAH

**Key obstacles observed in the sector**

While identifying main obstacles for the development of rubber and plastic products production in the Western Ukrainian regions 47 companies were contacted, of which 31 (66%) agreed to participate in the survey, and 16 (34%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 3.16. The rating of the main obstacles for the development of rubber and plastic products industry in Western Ukrainian regions**

The Ukrainian rubber and plastic products production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (45%), inaccessibility of funding (35%), outdated technologies and equipment (29%) and lack of government support (26%).

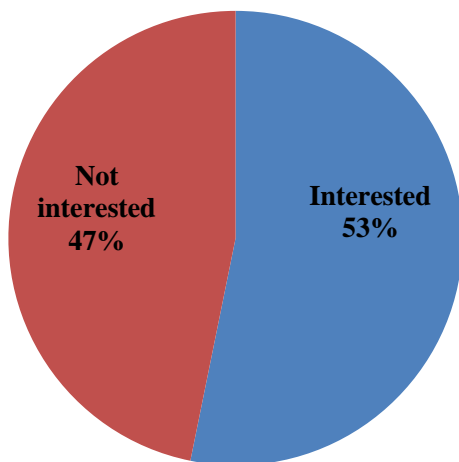
The bulk of the plastic and rubber production enterprises in the studied regions - are the old Soviet-type plants, which require equipment modernization and improving the quality of manufactured products. The use of outdated equipment (high resource and energy consumption of production) and low quality 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 an outflow of workers.

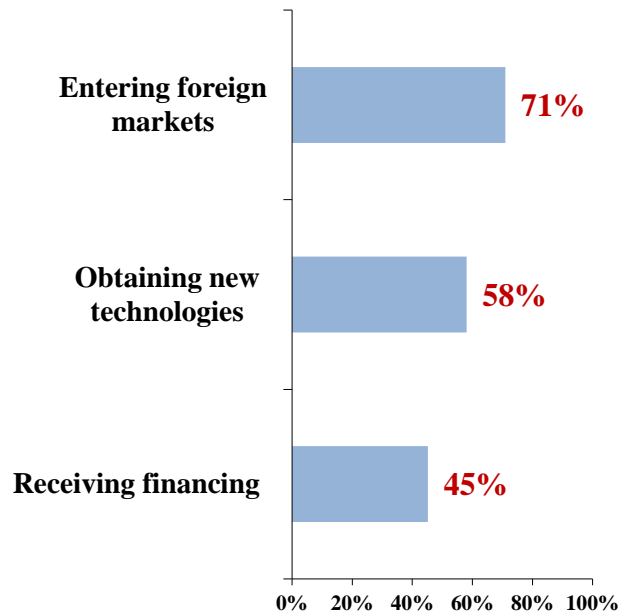
Modernization requires affordable long-term financing, with a lending rate of <10% per annum of at least 3 years. As for now, there are no state programs aimed at stimulating and supporting the modernization of industrial production (cheaper loans, lending rate compensation, etc.). There is also no effective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

Producers lack domestic raw materials, which they are forced to import. Low import duties and the absence of technical policies (quality control) lead to the dominance of imports at dumped prices of products of dubious quality, primarily from China and the countries of Southeast Asia.

During the survey, the potential for cooperation with the Dutch business was studied. As a result, about 48% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (71%), obtaining new technologies (58%) and receiving financing (45%).



**Fig. 3.17.** The interest of production of rubber and plastic products enterprises in cooperation with the Dutch business



**Fig. 3.18.** Main areas of potential cooperation with the Dutch business in the production of rubber and plastic products, %

### 3.3. Textile, clothing and footwear industry

#### General overview of the sector

In Western Ukrainian regions, there are 3,497 enterprises producing textile, clothing and footwear, of which 570 are legal entities (almost 16%), and 2,927 - individual entrepreneurs (84%).

The largest number of companies operates in the Lviv region (1 178 units or 51.2%), and the least - in Volyn region (280 units or 20.5%).

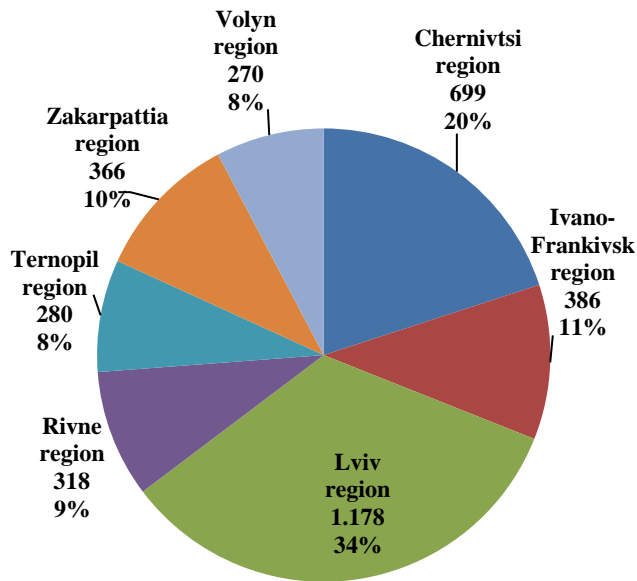
The sector provides work for 38 061 full-time employees, including 31 643 jobs at legal entities (83%), and 6 418 jobs created by individual entrepreneurs (about 17%). The sector's leader by the number of employees is Lviv region (15 665 people or 41%), while the smallest employment in the sector is in Volyn region (2 334 people or 6%).

It should be taken into account that official statistics does not cover 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.

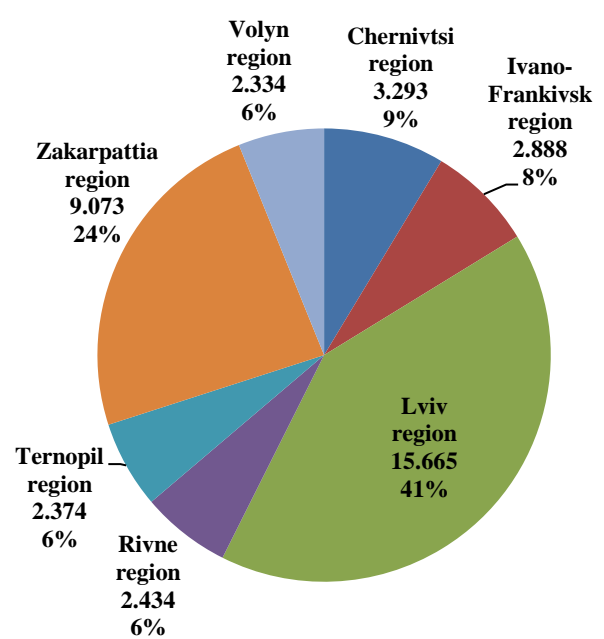
**Table 3.11. Number of functioning enterprises and employment in textile, clothing and footwear industry in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	38	661	699	2 198	1 095	3 293
Ivano-Frankivsk region	62	324	386	2 164	724	2 888
Lviv region	230	948	1 178	13 212	2 453	15 665
Rivne region	50	268	318	1 834	600	2 434
Ternopil region	36	244	280	1 783	591	2 374
Zakarpattia region	102	264	366	8 554	519	9 073
Volyn region	52	218	270	1 898	436	2 334
Total West Ukraine regions	570	2 927	3 497	31 643	6 418	38 061

Source: State Statistic Committee of Ukraine



**Fig. 3.19. Breakdown of textile, clothing and footwear industry enterprises by region, units**



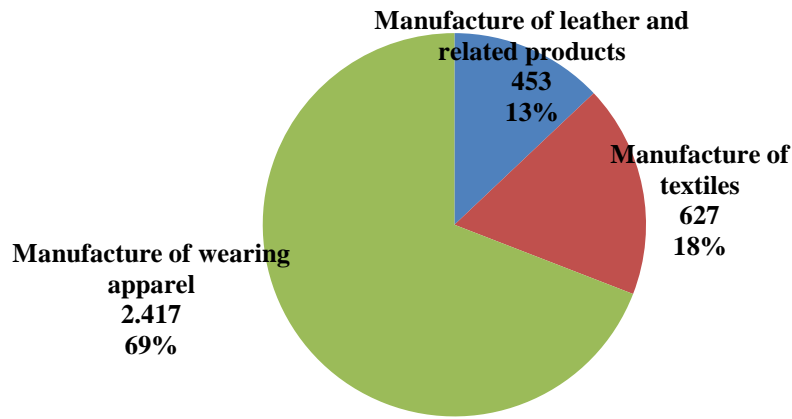
**Fig. 3.20. Regional employment structure in textile, clothing and footwear industry, people**

In terms of sub-sectors, the largest number of enterprises operates in the manufacture of wearing apparel (69%), and the smallest - in the manufacture of leather goods (13%).

**Table 3.12. Number of functioning enterprises by regions and subsectors**

Regions	Manufacture of leather and related products	Manufacture of textiles	Manufacture of wearing apparel	Total
Chernivtsi region	39	130	530	699
Ivano-Frankivsk region	19	87	280	386
Lviv region	270	159	749	1178
Rivne region	15	49	254	318
Ternopil region	20	98	162	280
Zakarpattia region	62	52	252	366
Volyn region	28	52	190	270
<b>TOTAL</b>	<b>453</b>	<b>627</b>	<b>2417</b>	<b>3497</b>

Source: State Statistic Committee of Ukraine



**Fig. 3.21. Breakdown of textile, clothing and footwear industry enterprises by subsectors, units**

### Sales

According to official statistics, in 2016 sales volume of textile, clothing and footwear enterprises totalled UAH 7 011 million, of which UAH 6 134 million were generated by legal entities (87%), and the rest UAH 877 million – by individual entrepreneurs (about 13%).

In the regional structure, the leaders are Lviv region (UAH 2 986 million or 43% of sales), Zakarpattia region (UAH 1 314 million or 19%) and Rivne region (UAH 738 million or 10%). Together, these regions account for more than 72% of textile, clothing and footwear sales among Western Ukrainian regions.

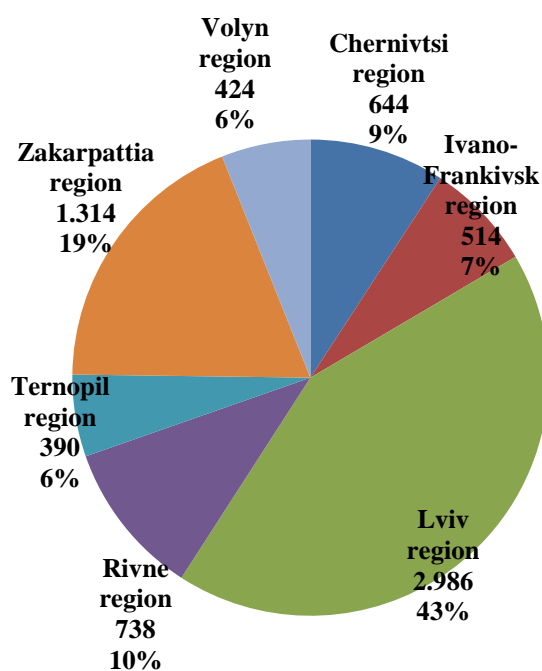
As it has been mentioned above, the official statistics can significantly underestimate the sales volume due to the presence of the shadow segment in the sector.

According to the results of companies' survey, the average level of sales through retail networks in textile, clothing and footwear production is about 25%.

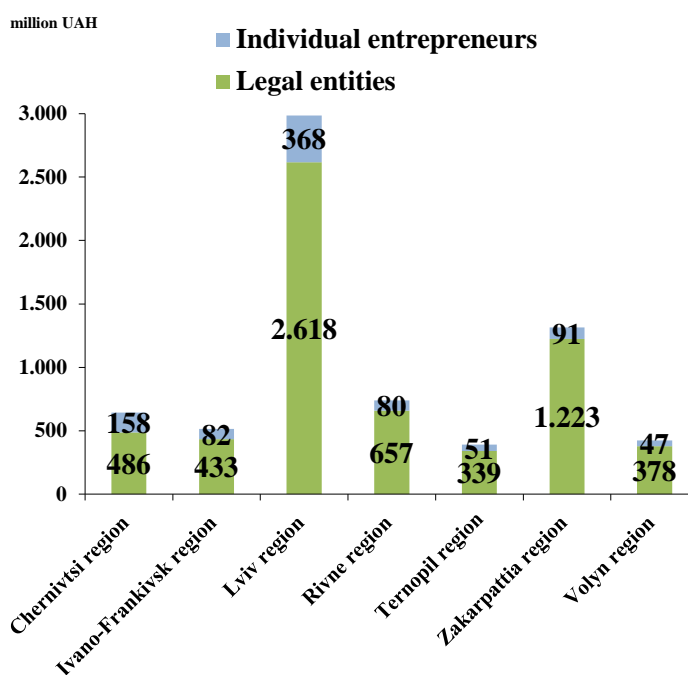
**Table 3.13. Sales of textile, clothing and footwear industry enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	486,4	157,6	644,0
Ivano-Frankivsk region	432,5	81,9	514,4
Lviv region	2 618,4	367,7	2 986,1
Rivne region	657,5	80,3	737,8
Ternopil region	339,2	51,0	390,2
Zakarpattia region	1 222,6	91,4	1 314,0
Volyn region	377,7	46,6	424,2
<b>Total West Ukraine regions</b>	<b>6 134,2</b>	<b>876,5</b>	<b>7 010,7</b>

*Source: State Statistic Committee of Ukraine*



**Fig. 3.23. Regional sales of textile, clothing and footwear industry products, million UAH**



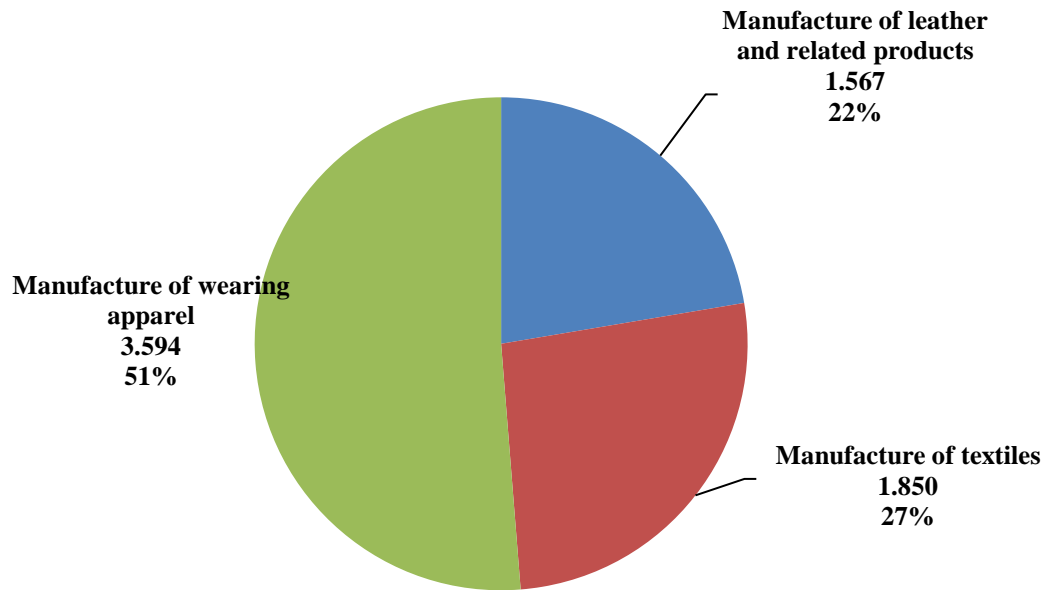
**Fig. 3.24. Regional sales of textile, clothing and footwear industry products by type of business entity, million UAH**

Textile products dominate in the commodity structure of sales (51% 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 Lviv region (sales volume – UAH 864 million or 55% of subsector sales), wearing apparel production – in Lviv region (UAH 1 528 million or 43%), and textiles production – in Lviv region (UAH 595 million or 32%).

**Table 3.14. Sales of textile, clothing and footwear industry in 2016 by subsectors, mln. UAH**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Manufacture of leather and related products	78,7	206,9	863,9	6,3	50,1	302,1	58,8	1 566,8
Manufacture of textiles	306,8	140,7	594,6	239,0	239,1	208,3	121,4	1 849,9
Manufacture of wearing apparel	258,4	166,8	1 527,6	492,5	101,1	803,6	244,0	3 594,0
<b>TOTAL</b>	<b>644,0</b>	<b>514,4</b>	<b>2 986,1</b>	<b>737,8</b>	<b>390,2</b>	<b>1 314,0</b>	<b>424,2</b>	<b>7 010,7</b>

Source: State Statistic Committee of Ukraine



**Fig. 3.25. Sales of textile, clothing and footwear industry by subsectors, mln. UAH**

### Production

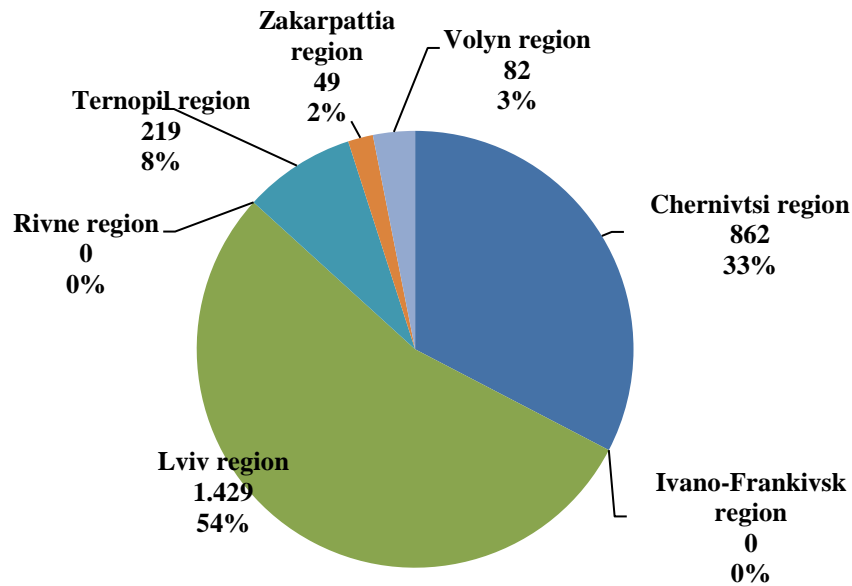
In 2016, the official footwear production volume in Western Ukrainian regions under consideration amounted to 2.64 million pairs, which is about 11.0% of the total production in Ukraine. In the regional structure, the leader is Lviv region (1 429 thousand pairs or 54% of production).

**Table 3.15. The volume of footwear production in 2014-2016, thousand pairs**

Region	2014	2015	2016
Chernivtsi region	1 307	969	862
Ivano-Frankivsk region	0	0	0
Lviv region	1 065	1 101	1 429
Rivne region	0	0	0
Ternopil region	162	161	219
Zakarpattia region	52	43	49
Volyn region	87	73	82
<b>Total West Ukraine regions</b>	<b>2 674</b>	<b>2 347</b>	<b>2 641</b>
<b>Total production in Ukraine</b>	<b>27 492</b>	<b>23 648</b>	<b>24 086</b>
<b>Share of 7 regions in Ukraine's production</b>	<b>9,7%</b>	<b>9,9%</b>	<b>11,0%</b>

Source: State Statistic Committee of Ukraine





**Fig. 3.27. Regional breakdown of footwear production in 2016, thousand pairs**

### Export

In 2016, the volume of textile, clothing and footwear exports in Western Ukrainian regions amounted to USD 455.6 million, of which almost 52% was generated by sales of apparel and clothing accessories (USD 237.1 million). Exported apparel is mainly products manufactured for famous international fashion brands on CMT terms.

In the regional structure of export, leaders are Lviv region (UAH 202.5 million or 44% of exports) and Zakarpattia region (UAH 167.9 million or 37%).

**Table 3.16. The volume of export by the companies of the textile, clothing and footwear industry in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Articles of apparel and clothing accessories, not knitted or crocheted	15 840	8 630	67 036	11 219	4 194	58 307	7 071	172 296
Other made-up textile articles; sets; worn clothing and worn textile articles; rags	82	8 300	29 156	110		37 302	106	75 055
Articles of apparel and clothing accessories, knitted or crocheted		43	44 177	453	54	19 769	311	64 806
Raw hides and skins (other than furskins) and leather	277	14 068	33 018	279	214	378	786	49 020
Footwear, gaiters and the like; parts of such articles	2 023	4 128	8 490			29 001	472	44 113
Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut			7 183	81		20 933		28 197
Knitted or crocheted fabrics			7 354			97		7 451
Furskins and artificial fur; manufactures thereof		3 411			1 019	39		4 470

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery			2 078	55		60		2 193
Headgear and parts thereof			1 185	34	171	159		1 549
Man-made filaments; strip and the like of man-made textile materials	65	86	337	76		454	72	1 091
Man-made staple fibres			722			175	60	957
Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	73	24	205	309		235		845
Cotton			297	132		381		810
Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	188		188	31	26	335	31	800
Umbrellas, sun umbrellas, walking sticks, seat-sticks, whips, riding-crops and parts thereof			578					578
Carpets and other textile floor coverings	202	370						572
Wool, fine or coarse animal hair; horsehair yarn and woven fabric			28			276		305
Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles of human hair			242				28	270
Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn			221					221
<b>Total</b>	<b>18 750</b>	<b>39 060</b>	<b>202 495</b>	<b>12 779</b>	<b>5 678</b>	<b>167 903</b>	<b>8 935</b>	<b>455 599</b>

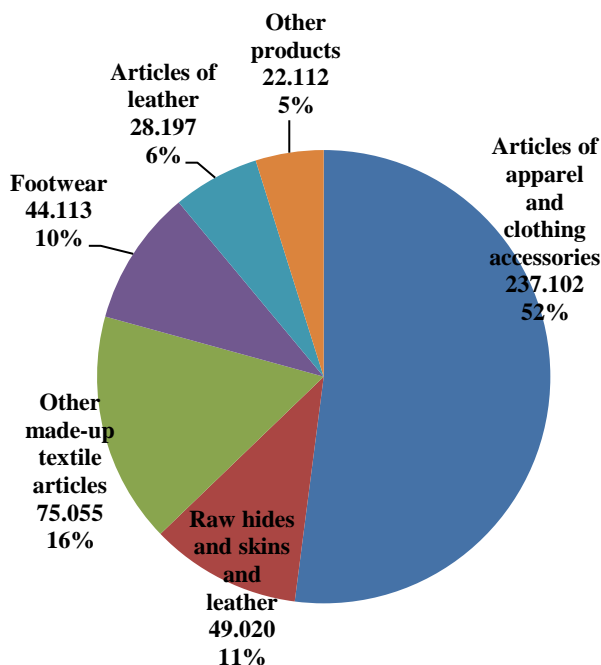


Fig. 3.28. Export goods structure of textile, clothing and footwear industry by subsectors, thousand USD

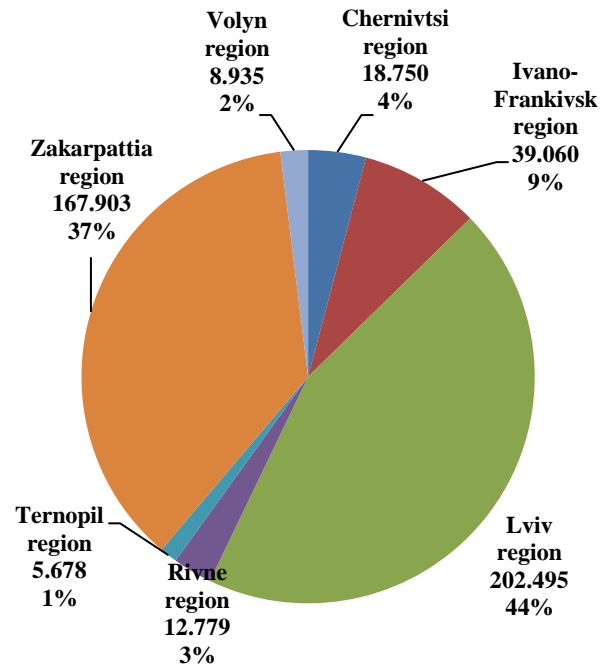


Fig. 3.29. Regional breakdown of textile, clothing and footwear industry products export, thousand USD

**Leading companies of the sector**

Main textile, clothing and footwear industry companies in Western Ukraine are "Bader Ukraine" LLC, Production and Commercial Firm "Balakkom" LLC and Subsidiary enterprise "Datskiy Tekstil" company "PVN Holding A / S" (Denmark).

**Table 3.17. Leading textile, clothing and footwear industry companies**

ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
33909724	LLC "Bader Ukraine"	ТОВ "Бадер Україна"	Leather products for car interior	more than 100 mln. UAH
30501814	Production and Commercial Firm "Balakkom" LLC	ТОВ Виробничо-Комерційна Фірма "Балакком"	Home textiles	more than 100 mln. UAH
31588791	Subsidiary enterprise "Datskiy Tekstil" company "PVN Holding A / S" (Denmark)	ДП "Датський Текстиль" Компанії "ПВН Холдінг А/С" (Данія)	Textile products	more than 100 mln. UAH
32285581	LLC "Dyuna-Vesta" LLC	ТОВ "Дюна-Веста"	Socks, pantyhose	more than 100 mln. UAH
31895961	LLC "Unioned Fashion Of Ukraine"	ТОВ "Об'єднана Мода України"	Women's outerwear	more than 100 mln. UAH
14353083	LLC "Sanders Winograisds" LLC	ТОВ "Сандерс-Виноградів"	Home textiles	more than 100 mln. UAH
22173327	PJSC "Shkirianyuk"	ПрАТ "Шкіряник"	Leather	more than 100 mln. UAH
310166	TDV "Trembita"	ТДВ "Трембіта"	Outerwear	50-100 mln. UAH
31659013	Subsidiary enterprise "Lvivteks" Datskaya Company "Grin Cotton"	ДП "Львівтекс" Датської Компанії "Грін Коттон"	Women's and men's outerwear	50-100 mln. UAH
38181266	LLC "Jasmin Linzheri"	ТОВ "Жасмін Лінжері"	Lingerie	50-100 mln. UAH

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

**Table 3.18. Top-10 companies of textile, clothing and footwear industry by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
Chernivtsi region	30501814	Production and Commercial Firm "Balakkom" LLC	ТОВ Виробничо-Комерційна Фірма "Балакком"	Home textiles	more than 100 mln. UAH
	310166	"Trembita" ALC	ТДВ "Трембіта"	Outerwear	50-100 mln. UAH
	34573814	Rosma Ltd	ТОВ "Розма"	Footwear	50-100 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
	307543	"Knitwear Firm" Arnika" PJSC	ПАТ "Трикотажна Фірма "Арніка"	Linen & sports jersey	less than 25 mln. UAH
	3972844	Chernivtsi Training and Production Enterprise of the Ukrainian Society of Deaf	Чернівецьке учбово-виробниче підприємство Українського Товариства Глухих	Textile products	less than 25 mln. UAH
	39478145	Bukovinska Shoe Factory "Kairos" LLC	ТОВ "Буковинська Взуттєва Фабрика "Кайрос"	Footwear	less than 25 mln. UAH
	36636399	Private Enterprise "Elana"	ПП "Елана"	Carpets	less than 25 mln. UAH
	34208467	Private Enterprise "Kuprum-Gold"	ПП "Купрум-Голд"	Leather	less than 25 mln. UAH
	37416888	"Nataliux" LLC	ТОВ "Наталюкс"	Knitwear	less than 25 mln. UAH
	31396353	Chernivtsi Cheremosh Production Enterprise of the Ukrainian Society of Deaf	Чернівецьке виробниче підприємство "Черемош" Українського Товариства Глухих	Apparel, textile products	less than 25 mln. UAH
Ivano-Frankivsk region	22173327	PJSC "Shkirianyк"	ПрАТ "Шкіряник"	Leather	more than 100 mln. UAH
	32624277	"World of Skins" LLC	ТОВ "Світ Шкіри"	Leather	50-100 mln. UAH
	32874062	"Tenmark" LLC	ТОВ "Тенмарк"	Textile products	25-50 mln. UAH
	37050984	Miram LLC	ТОВ "Мірам"	Footwear	less than 25 mln. UAH
	5394104	"Joint Ukrainian-Dutch Enterprise" MRV-Ukraine " LLC	ТОВ "Спільне Українсько-Нідерландське Підприємство "MPV-Юкрейн"	Fur products	less than 25 mln. UAH
	38411152	Garment Factory "Dovira" LLC	ТОВ "Швейна Фабрика "Довіра"	Outerwear, uniform	less than 25 mln. UAH
	38074807	"Ajour" LLC	ТОВ "Ажур"	Textile products	less than 25 mln. UAH
	37672258	"Tysinvest" LLC	ТОВ "Тисінвест"	Fur products, leather products, uniform	less than 25 mln. UAH
	5502462	"Ivano-Frankivsk Production and Trade Sewing Enterprise" Halychyna" PJSC	ПАТ "Івано-Франківське виробничо-торгівельне швейне підприємство "Галичина"	Outerwear	less than 25 mln. UAH
	32882199	"Tyskhutroluks" LLC	ТОВ "Тисхутролюкс"	Fur products	less than 25 mln. UAH
Ternopil region	306650	"Ternopil Association" Texterno " OJSC	ВАТ "Тернопільське Об'єднання "Текстерно"	Cotton fabrics, home textiles	50-100 mln. UAH
	33992697	"Tehprom-LLC"	ТОВ "Техпром- ЛТД"	Bags, big bags	50-100 mln. UAH
	32736671	Vinisan LLC	ТОВ "Вінісан"	Artificial leather	50-100 mln. UAH
	33768503	"Torgovyi Dom "Terkuriy" LLC	ТОВ "Торговий Дім "Теркурій"	Hosiery	25-50 mln. UAH
	14338122	Enterprise Billerbeek Ukraine feather-down factory owned by	Підприємство Біллербек Україна перо-пухова фабрика	Blankets, pillows	less than 25 mln. UAH

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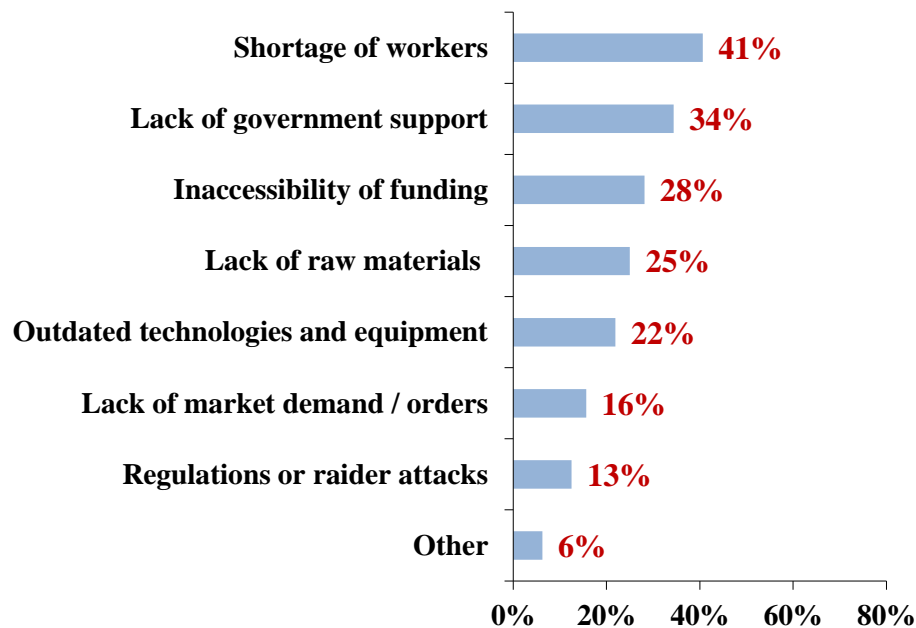
Region	ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
		Austrian Gerd Billerbek GmbH Vienna	заснована на власності юридичної особи Австрії компанії "Герд Біллербек Гмбх Відень"		
	32736549	Segesh-Ukraine LLC	ТОВ "Сегеш-Україна"	Uniforms	less than 25 mln. UAH
	37306726	Sakura Plus LLC	ТОВ "Сакура Плюс"	Hosiery	less than 25 mln. UAH
	4594901	"Galia" ALC	ТДВ "Галія"	Outerwear, fur products	less than 25 mln. UAH
	33198610	Enterprise "Nadiya" owned by Ternopil city public organization of social protection and rehabilitation of disabled people "Victoria"	Підприємство "Надія" засноване на власності Тернопільської міської громадської організації соціального захисту і реабілітації інвалідів "Вікторія"	Uniforms	less than 25 mln. UAH
	24620181	Private Enterprise "Yuta"	Приватне Підприємство "Юта"	Uniforms	less than 25 mln. UAH
Lviv region	33909724	"Bader Ukraine" LLC	ТОВ "Бадер Україна"	Leather products for car interior	more than 100 mln. UAH
	31588791	Subsidiary Enterprise "Datskiy Tekstil" Company "Pvn Holding A / S" (Denmark)	дочірнє підприємство "Датський текстиль" компанії "ПВН холдінг а/с" (Данія)	Textile products	more than 100 mln. UAH
	32285581	"Dyuna-Vesta" LLC	ТОВ "Дюна-Веста"	Socks, pantyhose	more than 100 mln. UAH
	31895961	"Unioned Fashion Of Ukraine" LLC	ТОВ "Об'єднана мода України"	Women's outerwear	more than 100 mln. UAH
	31659013	Subsidiary enterprise "Lvivteks" Datskaya Company "Grin Cotton"	Дочірнє підприємство "Львівтекс" датської компанії "Грін Коттон"	Women's and men's outerwear	50-100 mln. UAH
	5468417	PJSC "Ojsc Kalina"	ПрАТ "ВАТ Калина"	Women's underwear	50-100 mln. UAH
	5468127	PJSC "Stryjska Sewing Factory" Strikt"	ПрАТ "Стрийська швейна фабрика "Стрітекс"	Tailoring fabric, leather	50-100 mln. UAH
	31978052	Subsidiary enterprise "Htr Textile"	Дочірнє підприємство "ХРТ текстиль"	Children's clothing	50-100 mln. UAH
	20835669	Open Joint-Stock Company "Trottola"	ВАТ "Троттола"	Women's and men's outerwear	50-100 mln. UAH
	32894162	"Ukrainian Panchischna Kompaniya" LLC	ТОВ "Українська Панчішна Компанія"	Stockings	50-100 mln. UAH
Rivne region	35011201	"Fapomed Ukraine LLC "	ТОВ "Фапомед Україна"	Uniforms	50-100 mln. UAH
	306644	PJSC "Rovnensk Factory Of Non-Material Materials"	ПрАТ "Рівненська фабрика нетканних матеріалів"	Non-woven cloths	50-100 mln. UAH
	37531976	"Sim Teks-R" LLC	ТОВ "Сім Текс-Р"	Outerwear	less than 50 mln. UAH
	32413615	"Uklenko" LLC	ТОВ "Укленко"	Outerwear	less than 50 mln. UAH
	13981181	Private Agricultural Enterprise "Straklivske"	ПСП "Страклівське"	Uniforms	less than 50 mln. UAH
	32200031	"Ukrainian-German Joint Company" Almi" LLC	ТОВ "українсько-німецьке спільне підприємство "Алмі"	Outerwear	less than 50 mln. UAH
	37198263	PE "VALANTEKS"	ПП "Валантекс"	Knitted hosiery	less than 50

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Region	ID code	Company name (English)	Company name (Ukrainian)	Products	Revenues
					mln. UAH
	2971647	"Shevny-Torgove Pidpnyemstvo" Mayak " LLC	ТОВ "Швейно-торгове підприємство "МАЯК"	Men's shirts and light women's clothing	less than 50 mln. UAH
	31765830	"Rivne-Style" LLC	ТОВ "Рівне-Стиль"	Outerwear	less than 50 mln. UAH
	30133042	PE - Firm "Drink-B"	ПП - Фірма "Сяйво-В"	Uniforms	less than 50 mln. UAH
Zakarpattia region	14353083	"Sanders Winograis" LLC	ТОВ "Сандерс-Виноградів"	Home textiles	more than 100 mln. UAH
	36246184	"Florian Shoes" LLC	ТОВ "Флоріан Шуз"	Footwear	50-100 mln. UAH
	309134	PJSC "Grono-Tex"	ПАТ "Гроно-Текс"	Menswear	50-100 mln. UAH
	20457014	Joint Ukrainian-German Company "Hoch-Bereeg" LLC	ТОВ спільне українсько-німецьке підприємство "Хох-Берег" ЛТД	Knitted hosiery	50-100 mln. UAH
	30600943	"Mukachivska Sewing Factory" LLC	ТОВ "Мукачівська швейна фабрика"	Children's clothing	50-100 mln. UAH
	34514696	"Novoteks" LLC	ТОВ "Новітекс"	Footwear	50-100 mln. UAH
	309140	PJSC "Uzhhorodo Sewing Factory"	ПрАТ "Ужгородська швейна фабрика"	Women's outerwear	less than 50 mln. UAH
	34231575	"Ukrain Abitex" LLC	ТОВ "Україн Абітекс"	Men's and children outerwear	less than 50 mln. UAH
	31394293	"Berezhnyanka" LLC	ТОВ "Березнянка"	Outerwear	less than 50 mln. UAH
	37172968	Pikard Ukraine LLC	ТОВ Пікард Україна	Leather products	less than 50 mln. UAH
Volyn region	38181266	"Jasmin Linzheri" LLC	ТОВ "Жасмін Лінжері"	Lingerie	50-100 mln. UAH
	20134458	PJSC "Edelvika"	ПрАТ "Едельвіка"	Home textiles, ethnic outerwear	less than 50 mln. UAH
	39384214	"Alpha Exports" LLC	ТОВ "Альфа Експо"	Footwear	less than 50 mln. UAH
	37320007	"Promteksservice" LLC	ТОВ "Промтекссервіс"	Women's and men's outerwear	less than 50 mln. UAH
	308695	"Vyrobnycho-Commercial Firm" Kovel" LLC	ТОВ "Виробничо-комерційна фірма "Ковель"	Women's and men's outerwear, uniforms	less than 50 mln. UAH
	39804709	"Ellen Groups" LLC	ТОВ "Еллен Груп"	Underwear	less than 50 mln. UAH
	37950582	"Yu.Kenves" LLC	ТОВ "Ю.Кенвес"	Industrial textiles	less than 50 mln. UAH
	36071631	"Pelta" LLC	ТОВ "Пелта"	Uniforms	less than 50 mln. UAH
	13352962	PJSC "Novovolinskaya Sewing Factory"	ПрАТ "Нововолинська швейна фабрика"	Uniforms	less than 50 mln. UAH
	32649980	PE "Tigres"	ПП "Тигрес"	Children cloths, home textiles, toys	less than 50 mln. UAH

**Key obstacles observed in the sector**

While identifying main obstacles for the development of textile, clothing and footwear manufacturing in the Western Ukrainian regions 60 companies were contacted, of which 32 (53%) agreed to participate in the survey, and 28 (47%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 3.30. The rating of main obstacles for the development of textile, clothing and footwear industry in Western Ukrainian regions**

The Ukrainian textile, apparel and footwear sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (41%), lack of government support (34%) and inaccessibility of funding (28%).

Like in other sectors, textile, apparel and footwear companies experience difficulties with recruiting staff. This is compounded by outward migration to the EU. The light industry sector has a poor reputation among young workers. Many Ukrainians aspire to non-industrial employment. Salary is seen as poor, with little opportunity for advancement. The minimum wage required to keep skilled weavers is about UAH 10 000 (€320) 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.

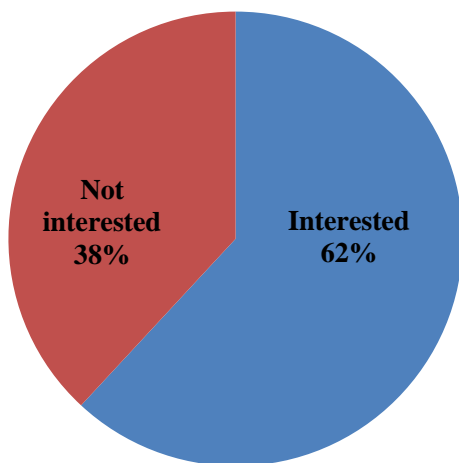
The problem of lack of government support is multifaceted. It includes lack of professional training programs for workers, non-transparent tenders, insufficient export promotion, and non-level playing field because of presence of shadow firms that operate under simplified taxation.



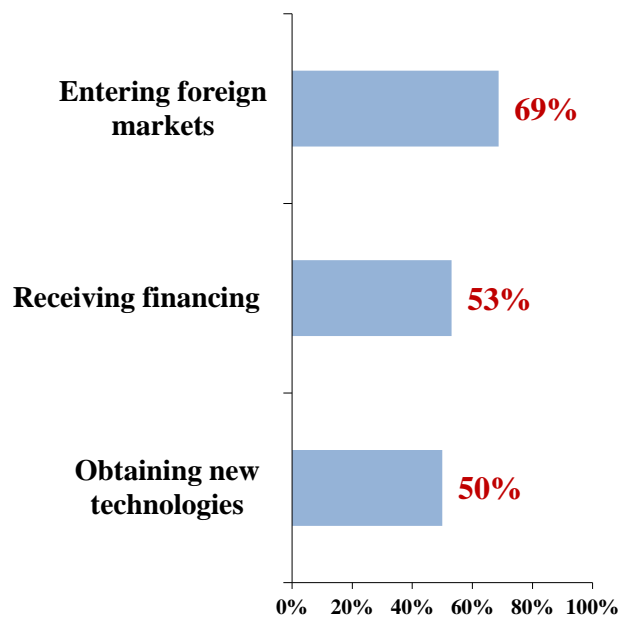
The main issue with financing appears to be two-fold. Bank interest rates at 22% are too high for the apparel and footwear sector, where margins are rarely above 20%. The other problem is access to finance for small businesses. In many cases they do not have detailed financial records, especially if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

Among other problems mentioned by market participants during the visits to the factories are: 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 62% of the surveyed companies express their interest in cooperation with the Dutch companies, first of all in entering foreign markets (69%), receiving financing (53%) and obtaining new technologies (50%).



**Fig. 3.31. The interest of textile, clothing and footwear industry enterprises in cooperation with the Dutch business**



**Fig. 3.32. Main areas of potential cooperation with the Dutch business in the textile, clothing and footwear industry, %**



### 3.4. Production of construction materials

#### General overview of the sector

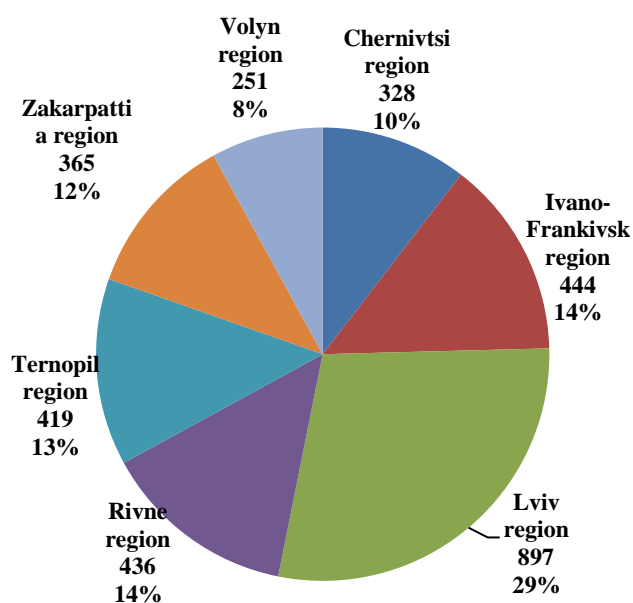
In Western Ukrainian regions, there are 3 140 enterprises producing construction materials, of which 563 are legal entities (18%), and 2 577 - individual entrepreneurs (82%).

The largest number of companies operates in Lviv region (897 units or 29%), and the least – in Volyn region (251 units or 8%).

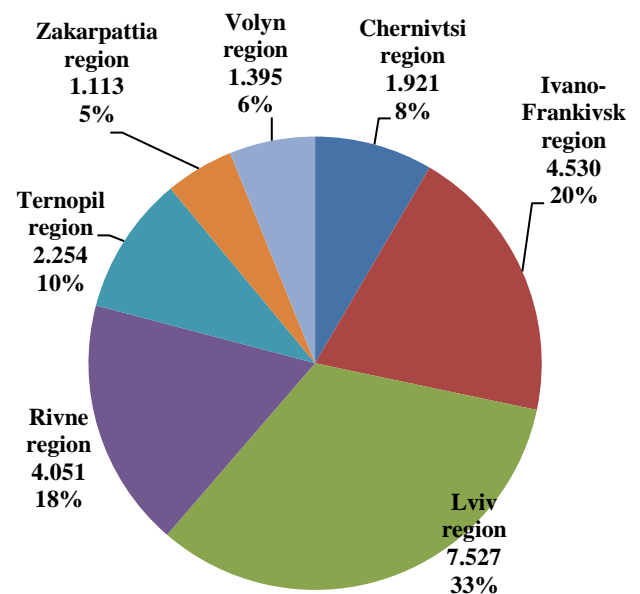
The sector is employing 22 791 full-time employees, including 17 951 in legal entities (79%), and 4 840 are employed by individual entrepreneurs (about 21%). The sector's leader by the number of employees is Lviv region (7 527 people or 33%), while the smallest employment in the sector is in Zakarpattia region (1 113 people or almost 5%).

**Table 3.19. Number of functioning enterprises and employment in production of construction materials in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	63	265	328	1 498	423	1 921
Ivano-Frankivsk region	94	350	444	3 892	638	4 530
Lviv region	178	719	897	6 208	1 319	7 527
Rivne region	85	351	436	3 257	794	4 051
Ternopil region	73	346	419	1 478	776	2 254
Zakarpattia region	30	335	365	595	518	1 113
Volyn region	40	211	251	1 023	372	1 395
<b>Total West Ukraine regions</b>	<b>563</b>	<b>2 577</b>	<b>3 140</b>	<b>17 951</b>	<b>4 840</b>	<b>22 791</b>



**Fig. 3.33. Breakdown of production of construction materials enterprises by regions, units**



**Fig. 3.34. Regional employment structure in production of construction materials, people**

## Sales

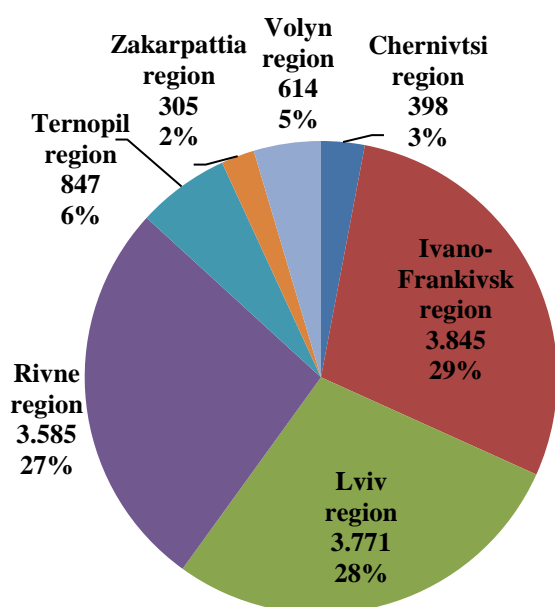
In 2016, sales volume of construction materials enterprises amounted to about UAH 13 366 million, of which UAH 12 719 million were generated by legal entities (95%), and the rest UAH 646 million – by individual entrepreneurs (about 5%).

In the regional structure, leaders are Ivano-Frankivsk region (UAH 3 845 million or 29% of sales), Lviv region (UAH 3 771 million or 28%) and Rivne region (UAH 3 585 million or 27%). Together, these regions account for more than 84% of construction materials sales among Western Ukrainian regions.

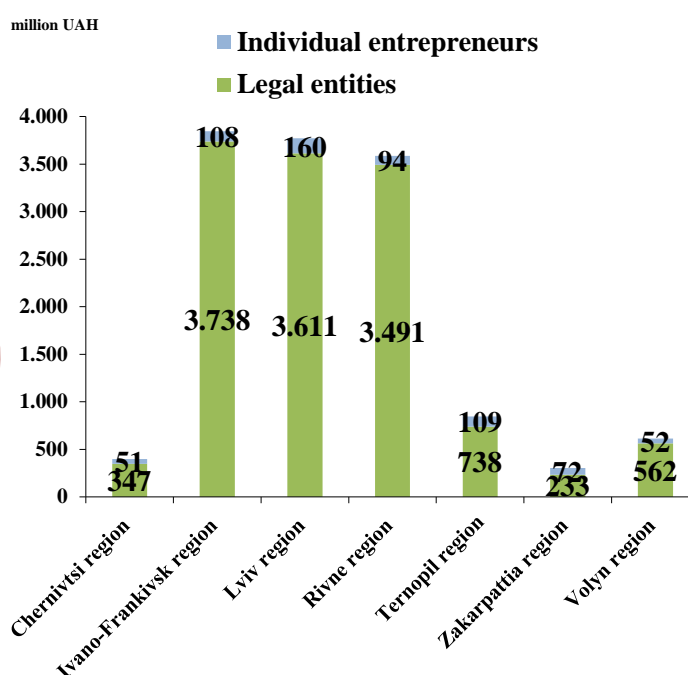
According to the results of companies' survey, the average level of sales through retail networks in construction materials production is about 17%.

**Table 3.20. The volume of sales of construction materials production enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	347,0	51,0	398,1
Ivano-Frankivsk region	3 737,7	107,5	3 845,2
Lviv region	3 611,2	160,0	3 771,2
Rivne region	3 491,1	94,3	3 585,4
Ternopil region	737,6	109,2	846,9
Zakarpattia region	233,2	71,6	304,7
Volyn region	561,7	52,5	614,1
<b>Total West Ukraine regions</b>	<b>12 719,4</b>	<b>646,1</b>	<b>13 365,5</b>



**Fig. 3.35. Regional sales of construction materials products, million UAH**



**Fig. 3.36. Regional sales of construction materials by type of business entity, million UAH**

**Production**

Main types of construction materials in the studied regions are brick, reinforced concrete constructions and ready-made concrete mixtures.

In a regional structure, the leader is Lviv region: 31% of ceramic building bricks production in Western Ukraine regions, 28% of reinforced concrete constructions production, 46% of ready-made concrete mixtures production).

It should be noted separately that in the region there are also 3 large enterprises, which are the only producers in their segment: PJSC "Ivano-Frankivsk Cement" and PJSC "Mykolayivtsement" (annual production – about 1.4-1.5 million ton and 3.0 million ton of cement annually) and "Karpatska Ceramics" LLC (annual production – about 1.2 thousand tons of ceramic tiles).

**Table 3.21. The volume of construction materials production in 2016, tons**

<b>Region</b>	<b>Ceramic building bricks, flooring blocks, thousand m<sup>3</sup></b>	<b>Prefabricated structural components for building or civil engineering, of cement, concrete or artificial stone, thousand tons</b>	<b>Ready-mixed concrete, thousand tons</b>
Chernivtsi region	149,2	23,3	288,9
Ivano-Frankivsk region	258,2	124,6	358,5
Lviv region	266,3	241,9	1 382,6
Rivne region	56,5	171,3	394,8
Ternopil region	22,9	184,7	205,2
Zakarpattia region	62,2	41,0	125,3
Volyn region	46,4	70,2	251,8
<b>Total West Ukraine regions</b>	<b>861,7</b>	<b>857,0</b>	<b>3 007,1</b>
<b>Total production in Ukraine</b>	<b>2 190,4</b>	<b>4 900,6</b>	<b>15 693,6</b>
<i>Share of West Ukraine regions in Ukraine's production</i>	<i>39%</i>	<i>17%</i>	<i>19%</i>

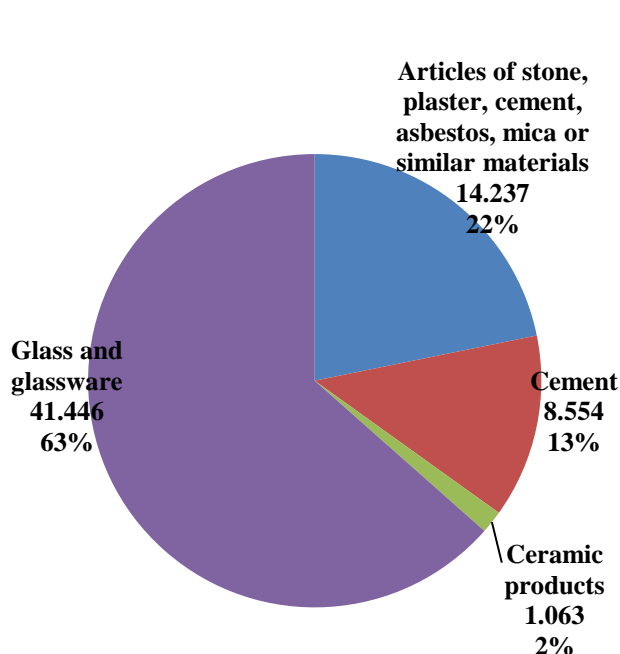
**Export**

In 2016, the volume of construction materials exports in Western Ukrainian regions amounted to about USD 65.3 million, of which almost 96% was generated by Rivne region (USD 36.9 million), Lviv region (USD 13.2 million), and Ivano-Frankivsk region (USD 12.3 million).

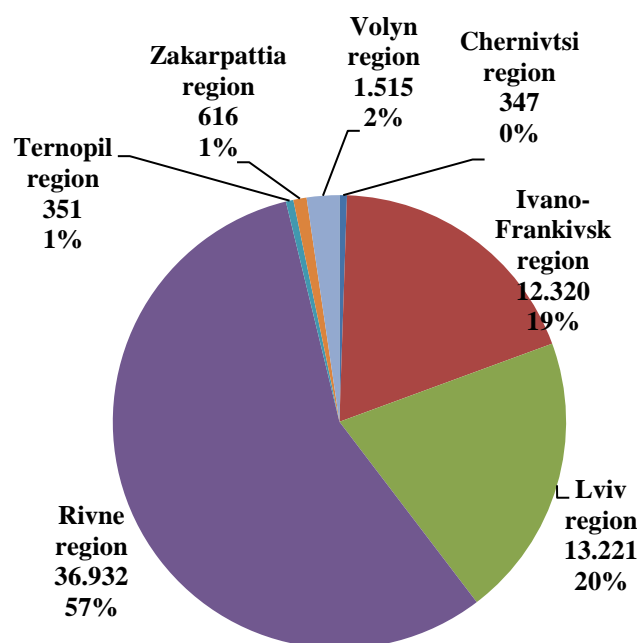
Glass and glassware dominate in the commodity structure of exports (63% of total exports of the sector).

**Table 3.22. The volume of export by the companies producing construction materials in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Articles of stone, plaster, cement, asbestos, mica or similar materials	347	3 483	8 979	477	147	440	363	14 237
Cement		8 554						8 554
Ceramic products		167	36				860	1 063
Glass and glassware		115	4 206	36 455	204	176	291	41 446
<b>TOTAL</b>	<b>347</b>	<b>12 320</b>	<b>13 221</b>	<b>36 932</b>	<b>351</b>	<b>616</b>	<b>1 515</b>	<b>65 301</b>



**Fig. 3.37. Export structure of construction materials by subsectors, thousand USD**



**Fig. 3.38. Regional breakdown of construction materials export, thousand USD**

**Leading companies of the sector**

The main producers of construction materials in the Western Ukrainian regions are PJSC "Ivano-Frankivsk Cement", "KRT Corporation" LLC and PrJSC "Konsumers-Skolo-Zorya".

**Table 3.23. Leading production of construction materials companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
292988	PJSC "Ivano-Frankivsk Cement"	ПАТ "Івано-Франківськцемент"	more than 100 mln. UAH
37786903	"KRT Corporation" LLC	ТОВ "Корпорація КРТ"	more than 100 mln. UAH
22555135	PrJSC "Konsumers-Skolo-Zorya"	ПрАТ "Консюмерс-Скло-Зоря"	more than 100 mln. UAH
293025	PJSC "Mykolayivtsement"	ПАТ "Миколаївцемент"	more than 100 mln. UAH
33589252	"Spetsavtoinvest" LLC	ТОВ "Спецавтоінвест"	more than 100 mln. UAH
30923971	PrJSC "Kostopilskiy Factory Of Glassware"	ПрАТ "Костопільський Завод Скловиробів"	more than 100 mln. UAH
37961273	"Ferozit" LLC	ТОВ "Ферозіт"	more than 100 mln. UAH
293462	PrJSC "Rokitnivsky Screen Factory"	ПрАТ "Рокитнівський Скляний Завод"	more than 100 mln. UAH
30823262	LLC "Lviv Isolating Company"	ТОВ "Львівська Ізоляторна Компанія"	more than 100 mln. UAH
35749131	LLC "Klingspor"	ТОВ "Клінгспор"	more than 100 mln. UAH

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

**Table 3.24. Top-10 companies-producers of construction materials by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	292818	Industrial and commercial company "Chernivtsi Insulating Material Factory" LLC	ТОВ ВКП "Чернівецький завод теплоізоляційних матеріалів"	50-100 mln. UAH
	5508177	PJSC "Chernivtsi brick factory №3"	ПАТ "Чернівецький цегельний завод №3"	25-50 mln. UAH
	35583179	PE "Granite-Development"	ПП "Граніт-Девелопмент"	less than 25 mln. UAH
	5383276	PrJSC "Mamalihivskyy gypsum plant"	ПрАТ "Мамалигівський гіпсовий завод"	less than 25 mln. UAH
	32452502	"Partner K" LLC	ТОВ "Партнер К"	less than 25 mln. UAH
	36866076	"Production-commercial firm" Modern Building Materials " LLC	ТОВ "виробничо-комерційна фірма "Сучасні Будівельні Матеріали"	less than 25 mln. UAH
	31621126	"Novodnistrovsky concrete and solving plant" LLC	ТОВ "Новодністровський бетонно-розчинний завод"	less than 25 mln. UAH
	5758530	"Factory of build construction" LLC	ТОВ "Завод будівельних конструкцій"	less than 25 mln. UAH
	31417650	PE "Kovali"	ПП "Ковали"	less than 25 mln. UAH
	1037595	"Chernivtsi transmission mechanized column №76" ALC	ТДВ "Чернівецька пересувна механізована колона №76"	less than 25 mln. UAH
Ivano-	292988	PJSC "Ivano-Frankivsk Cement"	ПАТ "Івано-	more than 100 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Frankivsk region			Франківськцемент"	
	5526020	"Ivano-Frankivskzalizobeton" ALC	ТДВ "Івано-Франківськзалізобетон"	50-100 mln. UAH
	5467228	PrJSC "Kolomyia plant of building materials"	ПрАТ "Коломийське Заводоуправління Будівельних Матеріалів"	50-100 mln. UAH
	32604981	SE "Spetszalizobeton" OJSC "Ivano-Frankivsk Cement"	ДП "Спецзалізобетон" ВАТ "Івано-Франківськцемент"	50-100 mln. UAH
	32014889	"Karpatska Ceramics" LLC	ТОВ "Карпатська Кераміка"	50-100 mln. UAH
	34659000	"Galtehnopark" LLC	ТОВ "Галтехнопарк"	50-100 mln. UAH
	31263195	"Rumata" LLC	ТОВ "Румата"	25-50 mln. UAH
	5495880	PJSC "Build Materials"	ПАТ "Будівельні Матеріали"	25-50 mln. UAH
	13663989	PE "Spring-Teleradioservice"	ПП "Весна-Телерадіосервіс"	25-50 mln. UAH
	32014894	"3 Betons" LLC	ТОВ "3 Бетони"	25-50 mln. UAH
Ternopil region	33589252	"Spetsavtoinvest" LLC	ТОВ "Спецавтоінвест"	more than 100 mln. UAH
	37961273	"Ferozit" LLC	ТОВ "Ферозіт"	more than 100 mln. UAH
	130688	"Ternopil concrete products plant" ALC	ТДВ "Тернопільський Завод ЗБК"	50-100 mln. UAH
	5421350	"Berezovytsa Combine "Budindustriya" ALC	ТДВ "Березовицький Комбінат" Будіндустрія"	50-100 mln. UAH
	291569	"Pyvisotsky factory for building materials" LLC	ТОВ "Підвисоцький завод будівельних матеріалів"	25-50 mln. UAH
	4636195	"Ternobuddetal" PJSC	ПАТ "Тернобуддеталь"	25-50 mln. UAH
	33866733	"Lihtner Beton Ternopil" LLC	ТОВ "Ліхтнер Бетон Тернопіль"	25-50 mln. UAH
	5398154	PJSC "Ternopil plant for manufacturing road - building materials"	ПАТ "Тернопільський комбінат по виробництву шляхово - будівельних матеріалів"	25-50 mln. UAH
	39603853	"Agroindustry 11" LLC	ТОВ "Агроіндустрія 11"	less than 25 mln. UAH
	38686829	"Brukvey" LLC	ТОВ "Бруквей"	less than 25 mln. UAH
Lviv region	37786903	"KRT Corporation" LLC	ТОВ "Корпорація КРТ"	more than 100 mln. UAH
	293025	PJSC "Mykolayivtsement"	ПАТ "Миколаївцемент"	more than 100 mln. UAH
	30823262	"Lviv Isolating Company" LLC	ТОВ "Львівська Ізоляторна Компанія"	more than 100 mln. UAH
	35749131	"Klingspor" LLC	ТОВ "Клінгспор"	more than 100 mln. UAH
	23265899	"Magic" LLC	ТОВ "Магік"	more than 100 mln. UAH
	39216802	"EFE Beton LLC "	ТОВ "ЕФЕ Бетон"	more than 100 mln. UAH
	37123114	"Status MKS" LLC	ТОВ "Статус МКС"	more than 100 mln. UAH
	32181428	"Betonbud" LLC	ТОВ "Бетонбуд"	more than 100 mln. UAH
	33182883	PJSC "Rosdilskiy Ceramic Factory"	ПрАТ "Роздільський Керамічний Завод"	50-100 mln. UAH
34814969	"Lviv Concrete" LLC	ТОВ "Львівський Бетон"	50-100 mln. UAH	
Rivne region	22555135	PJSC "Konsumers-Skolo-Zorya"	ПрАТ "Консюмерс-Скло-Зоря"	more than 100 mln. UAH
	30923971	PJSC "Kostopilskiy Factory Of Glassware"	ПрАТ "Костопільський Завод Скловиробів"	more than 100 mln. UAH
	293462	PJSC "Rokitnivsky glass factory"	ПрАТ "Рокитнівський Скліний Завод"	more than 100 mln. UAH
	22555939	"Rovnenkyi homebuilding complex" ALC	ТДВ "Рівненський Домобудівний Комбінат"	more than 100 mln. UAH
	34629505	"Skloresurs" LLC	ТОВ "Склоресурс"	50-100 mln. UAH
	32785198	PE - Firm "Torgbud-Service"	ПП - Фірма "Торгбуд-Сервіс"	50-100 mln. UAH
	5505696	PJSC "Rovnenkyi factory of heavy-duty reinforced concrete structures "	ПАТ "Рівненський завод надміцних залізобетонних конструкцій"	less than 50 mln. UAH
	5515192	"Rivne factory of build materials" ALC	ТДВ "Рівненський Завод Будівельних Матеріалів"	less than 50 mln. UAH
	37326695	"Zdolbunivsky Betoneks" LLC	ТОВ "Здолбунівський Бетонекс"	less than 50 mln. UAH

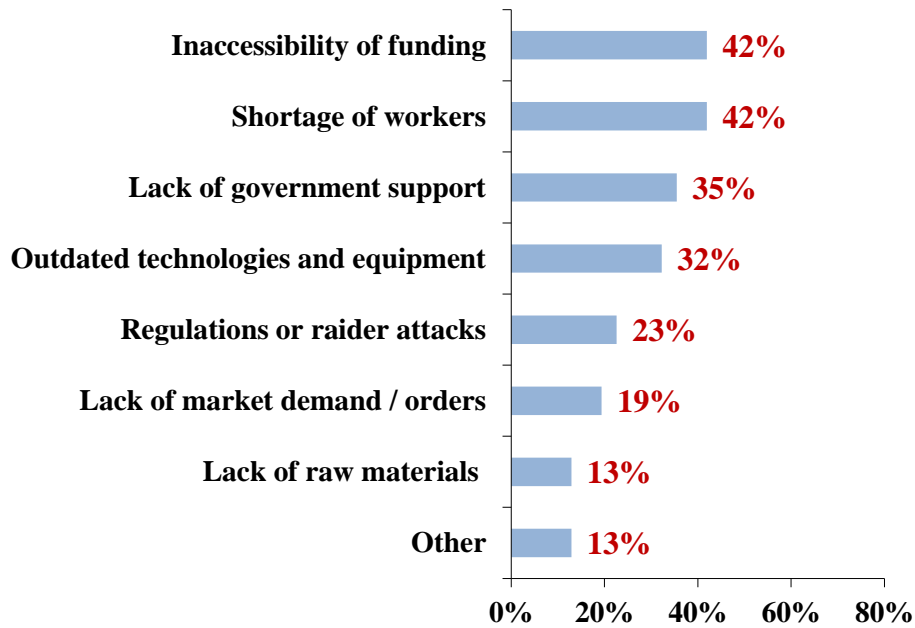
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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	32171300	"Adena" LLC	ТОВ "Адена"	less than 50 mln. UAH
Zakarpattia region	33537974	"Rusinia" LLC	ТОВ "Русинія"	more than 100 mln. UAH
	222189	PJSC "Irshava abrasive plant"	ПАТ "Іршавський абразивний завод"	50-100 mln. UAH
	5515009	"Build Industry Factory" ALC	ТДВ "Завод Будівельної Індустрії"	less than 50 mln. UAH
	3327084	PJSC "Mukachevo factory of railway concrete products and structures"	ПАТ "Мукачівський завод залізобетонних виробів і конструкцій"	less than 50 mln. UAH
	3577252	Leased Enterprise "Vynogradiv factory of railway units"	Орендне Підприємство "Виноградівський Завод Залізобетонних Виробів"	less than 50 mln. UAH
	3001939	"Ariadna" LLC	ТОВ "Аріадна"	less than 50 mln. UAH
	32703031	PJSC "Beregivsky Career"	ПрАТ "Берегівський Кар'єр"	less than 50 mln. UAH
	20462168	Small PE "MV-Vodoliy"	МПП "МВ-Водолій"	less than 50 mln. UAH
	34216829	"Shalankivske Plyus" LLC	ТОВ "Шаланківське Плюс"	less than 50 mln. UAH
	32285439	"Delta-KMB" LLC	ТОВ "Дельта-КМБ"	less than 50 mln. UAH
Volyn region	33731798	"Lad Beton" LLC	ТОВ "Лад Бетон"	more than 100 mln. UAH
	32748030	PE "Intertrade"	ПП "Інтертрейд"	50-100 mln. UAH
	35684017	"Lihtner Beton Lutsk" LLC	ТОВ "Ліхтнер Бетон Луцьк"	less than 50 mln. UAH
	21744779	"Lesia-Plus" LLC	ТОВ "Лєся-Плюс"	less than 50 mln. UAH
	23251236	"Factory of build construction" LLC	ТОВ "Завод Будівельних Конструкцій"	less than 50 mln. UAH
	38741072	"Lutsk road transport mechanized colon 1" LLC	ТОВ "Луцька дорожня пересувна механізована колона 1"	less than 50 mln. UAH
	13344310	Small Business "Sugar"	Мале Підприємство "Полум'я"	less than 50 mln. UAH
	36347599	"UA Bruk" LLC	ТОВ "УА Брук"	less than 50 mln. UAH
	20132169	PE "West"	ПП "Захід"	less than 50 mln. UAH
	33661160	PE "Volodymyr-Volynsky" Sklo-Center "	ПП "Володимир-Волинський "Скло-Центр"	less than 50 mln. UAH

**Key obstacles observed in the sector**

While identifying main obstacles for the development of construction materials production in the Western Ukrainian regions 50 companies were contacted, of which 31 (62%) agreed to participate in the survey, and 19 (38%) refused. The following figure shows a rating of the obstacles as perceived by enterprises.



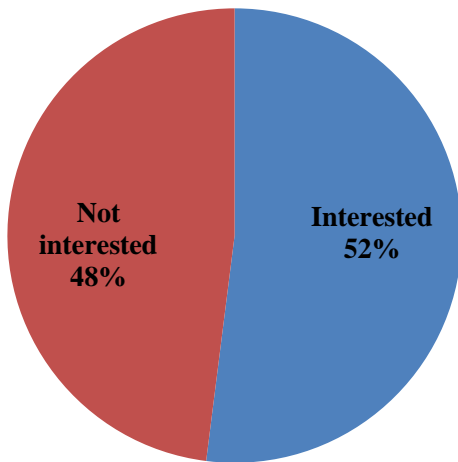


**Fig. 3.39. The rating of main obstacles for the development of construction materials production industry in Western Ukrainian regions**

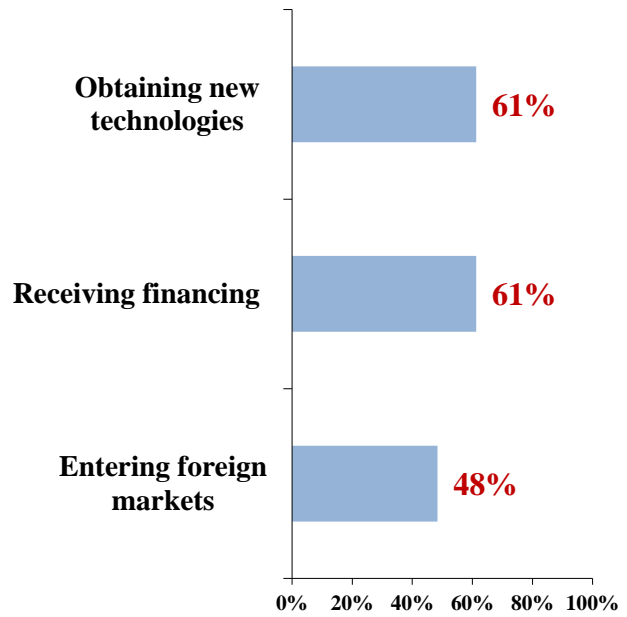
The Ukrainian construction materials production sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: inaccessibility of funding (42%), shortage of workers (42%), lack of government support (35%) and outdated technologies and equipment (32%).

During the survey, the potential for cooperation with the Dutch business was studied. As a result, about 52% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in obtaining new technologies (61%), receiving financing (61%) and entering foreign markets (48%).





**Fig. 3.40. The interest of construction materials production enterprises in cooperation with the Dutch business**



**Fig. 3.41. Main areas of potential cooperation with the Dutch business in the production of construction materials, %**

### 3.5. Metalworking

#### General overview of the sector

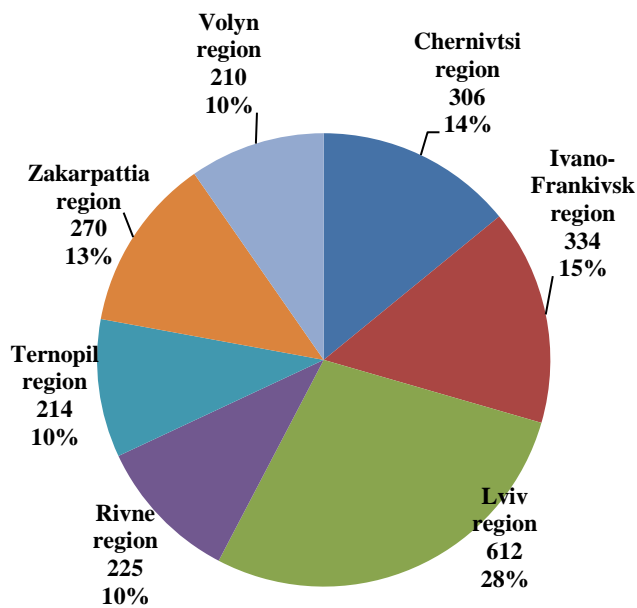
In Western Ukrainian regions, there are 2 171 metalworking enterprises, of which 428 are legal entities (19%), and 1 743 - individual entrepreneurs (81%).

The largest number of companies operates in Lviv region (612 units or 28%), and the least – in Volyn region (210 units or 10%).

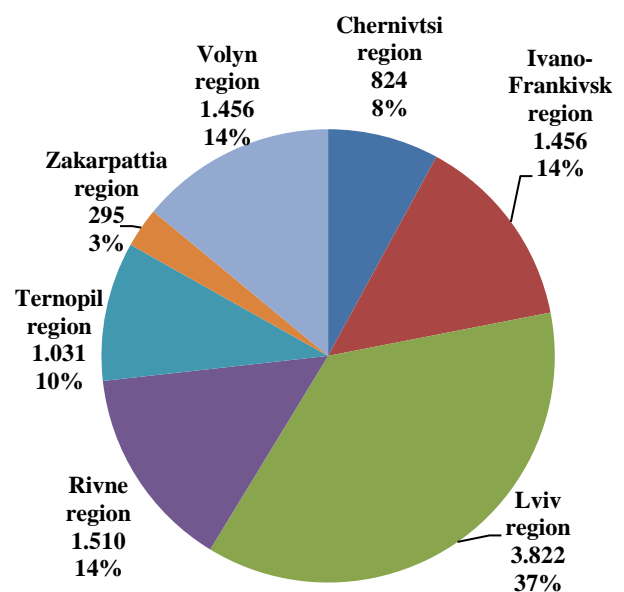
The sector is employing 10 394 full-time employees, including 8 079 in legal entities (78%), and 2 315 are employed by individual entrepreneurs (about 22%). The sector's leader by the number of employees is Lviv region (3 822 people or 37%), while the smallest employment in the sector is in Zakarpattia region (295 people or almost 3%).

**Table 3.25. Number of functioning enterprises and employment in metalworking in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	30	276	306	659	165	824
Ivano-Frankivsk region	72	262	334	1 021	435	1 456
Lviv region	170	442	612	3 053	769	3 822
Rivne region	43	182	225	1 208	302	1 510
Ternopil region	44	170	214	734	297	1 031
Zakarpattia region	30	240	270	236	59	295
Volyn region	39	171	210	1 168	288	1 456
<b>Total West Ukraine regions</b>	<b>428</b>	<b>1 743</b>	<b>2 171</b>	<b>8 079</b>	<b>2 315</b>	<b>10 394</b>



**Fig. 3.42. Breakdown of metalworking enterprises by regions, units**



**Fig. 3.43. Regional employment structure in metalworking, people**

## Sales

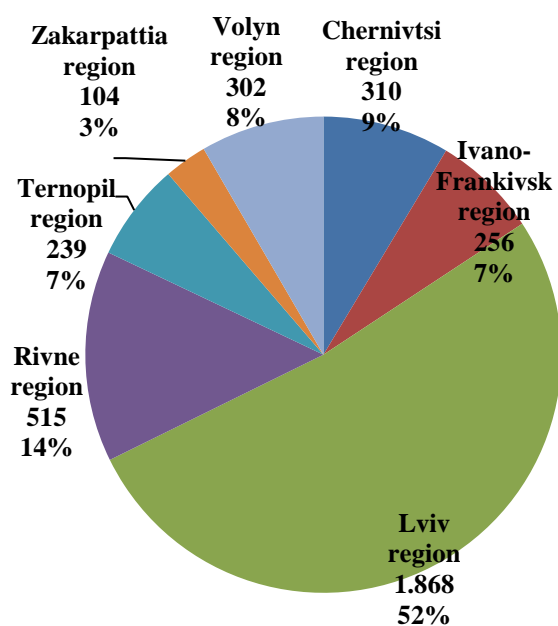
In 2016, sales volume of metalworking enterprises amounted to about UAH 3 594 million, of which UAH 3 154 million were generated by legal entities (88%), and the rest UAH 440 million – by individual entrepreneurs (about 12%).

In the regional structure, the leaders are Lviv region (UAH 1 868 million or 52% of sales), Rivne region (UAH 515 million or 14%) and Chernivtsi region (UAH 310 million or 9%). Together, these regions account for more than 85% of metalworking enterprises sales among Western Ukrainian regions.

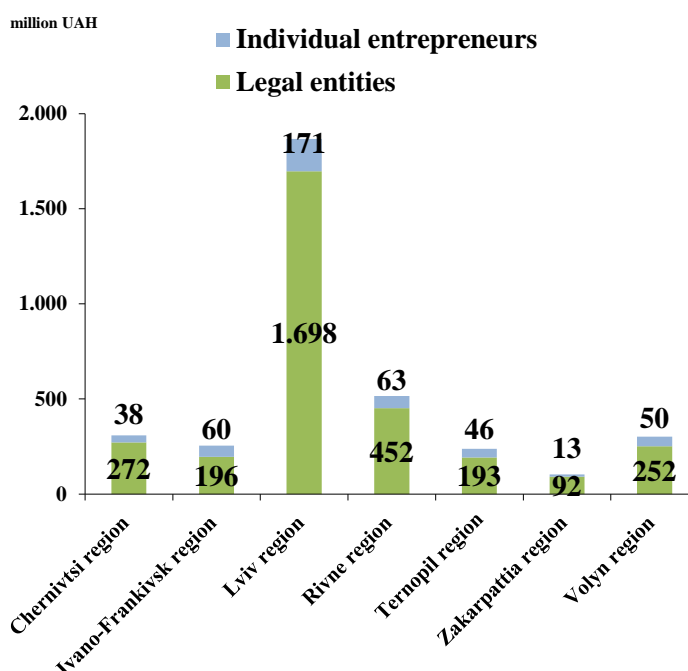
According to the results of companies' survey, the average level of sales through retail networks in metalworking production is about 18%.

**Table 3.26. The volume of sales of metalworking enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	271,7	37,9	309,6
Ivano-Frankivsk region	195,7	60,0	255,7
Lviv region	1 697,7	170,6	1 868,3
Rivne region	452,3	63,1	515,4
Ternopil region	193,3	45,6	238,9
Zakarpattia region	91,6	12,8	104,4
Volyn region	251,6	49,9	301,5
<b>Total Western Ukraine regions</b>	<b>3 154,1</b>	<b>439,9</b>	<b>3 594,0</b>



**Fig. 3.44. Regional sales of metalworking products, million UAH**



**Fig. 3.45. Regional sales of metalworking products by type of business entity, million UAH**

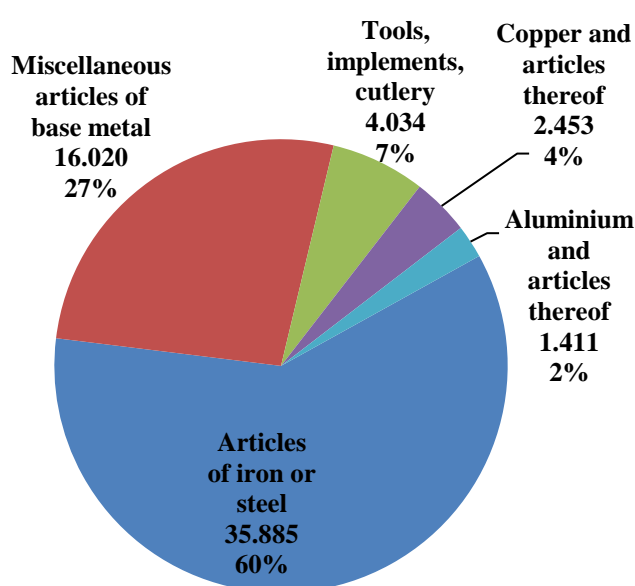
**Export**

In 2016, the volume of metalworking products export in Western Ukrainian regions amounted to about USD 59,8 million, of which almost 56% was generated by Lviv region (USD 33.4 million).

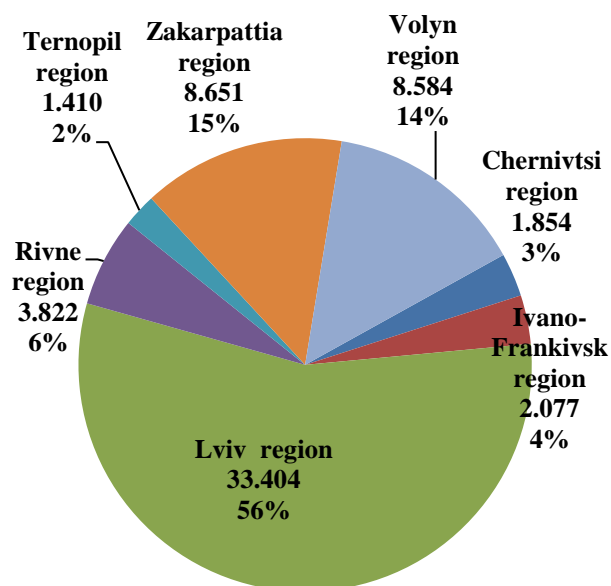
Articles of iron or steel dominate in the commodity structure of exports (60% of total exports of the sector).

**Table 3.27. The volume of export by the companies of the metalworking in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Aluminium and articles thereof	35		1 076			300		1 411
Articles of iron or steel	1 463	1 413	19 402	3 435	1 347	4 595	4 231	35 885
Copper and articles thereof			698			87	1 668	2 453
Miscellaneous articles of base metal	357	526	9 170	47	64	3 296	2 560	16 020
Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal		138	3 058	340		373	125	4 034
<b>TOTAL</b>	<b>1 854</b>	<b>2 077</b>	<b>33 404</b>	<b>3 822</b>	<b>1 410</b>	<b>8 651</b>	<b>8 584</b>	<b>59 803</b>



**Fig. 3.46. Export goods structure of metalworking by subsectors, thousand USD**



**Fig. 3.47. Regional breakdown of metalworking products export, thousand USD**

**Leading companies of the sector**

The main metalworking companies in the Western Ukrainian regions are "Rodnichok-1" LLC, SE "Chernivtsi factory of medical products" and Dana Metal Ukraine LLC.

**Table 3.28. Leading metalworking companies**

<b>ID code</b>	<b>Company name (English)</b>	<b>Company name (Ukrainian)</b>	<b>Product</b>	<b>Revenues</b>
1267395	"Chervonograd metal constructions factory" ALC	ТДВ "Червоноградський завод металокопункцій"	Metal structures	more than 100 mln. UAH
35413712	"Ken-Pak Yavoriv" LLC	ТОВ "Кен-Пак Яворів"	Metal packaging	more than 100 mln. UAH
24175498	PrJSC "Agroresurs"	ПрАТ "Агроресурс"	Hardware	more than 100 mln. UAH
32993129	Subsidiary Enterprise "NG Metal Ukraine N. Graversens metalvarefabrik A/S	ДП "Ен Джі Метал Україна" Компанії Н.Граверсен Металварефабрік А/С	Metalware, hardware	more than 100 mln. UAH
33775568	"Technoap UA" LLC	ТОВ "Технокап УА"	Metal packaging	more than 100 mln. UAH
31754918	"Fakro Orbita" LLC LLC	ТОВ "Факро Орбіта"	Metal doors	more than 100 mln. UAH
31533318	"Production Association" Kovelsilmash" LLC	ТОВ "Виробниче Об'єднання "Ковельсьільмаш"	Metalware, hardware	more than 100 mln. UAH
36697006	"Metalwork Factory" LLC	ТОВ "Завод Металевих Виробів"	Metalware, hardware	more than 100 mln. UAH
39100130	"Rodnichok-1" LLC	ТОВ "Родничок-1"	Doors, windows, thresholds of aluminum rolled products	50-100 mln. UAH
22415836	LLC "Ekran"	ТОВ "Екран"	Metal doors and windows	50-100 mln. UAH

Regional distribution of the largest companies in the sector is shown in Table 3.29.

Table 3.29. Top-10 metalworking companies by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
Chernivtsi region	39100130	"Rodnichok-1" LLC	ТОВ "Родничок-1"	Doors, windows, thresholds of aluminum rolled products	50-100 mln. UAH
	14257180	SE "Chernivtsi factory of medical products"	МП "Чернівецький завод медичних виробів"	Corks, metal caps	50-100 mln. UAH
	38623486	"Aplot" LLC	ТОВ "Аплот"	Metal and armored doors	25-50 mln. UAH
	21437126	"Ekspriltservis" LLC	ТОВ "Експріелтсервіс"		less than 25 mln. UAH
	32472859	"Vikna Stroy" LLC	ТОВ "Вікна Строй"	Doors, windows, doorsteps from black metal	less than 25 mln. UAH
	32278684	Collective Enterprise "Mavis"	КП "Мавіс"	Doors, windows, thresholds of aluminum rolled products	less than 25 mln. UAH
	14314653	ALC "Caliber"	ТДВ "Калібр"	Metal screws	less than 25 mln. UAH
	25082281	LLC "Litmash"	ТОВ "Литмаш"	Forms, molds for casting	less than 25 mln. UAH
	37722656	LLC "Talisman Bukovyna"	ТОВ "Талісман Буковина"	Doors, windows, doorsteps from black metal	less than 25 mln. UAH
	2972440	OJSC "Chernivetsi emalzavod" Karpaty "	ВАТ "Чернівецький емальзавод "Карпати"	Metal casting for machine building	less than 25 mln. UAH
Ivano-Frankivsk region	32882217	Dana Metal Ukraine LLC	ТОВ Дена Метал Україна	Grids, metal wire fences	50-100 mln. UAH
	36734168	"Stalbudmontazh" LLC	ТОВ "Стальбудмонтаж"	Building metal constructions	less than 25 mln. UAH
	35276852	"Tsitadel Group" LLC	ТОВ "Цитадель Груп"	Doors, windows, thresholds of aluminum rolling	less than 25 mln. UAH
	30107358	PE "Vodoliy-YAP"	ПП "Водолій-ЯП"	Hardware (fasteners, tools, hinges, etc.)	less than 25 mln. UAH
	25570365	PrJSC "Barvapromtara"	ПрАТ "Барвапромтара"	Barrels, canisters, metal boxes with a capacity of 50-300 liters	less than 25 mln. UAH
	32624264	"Irest" LLC	ТОВ "Ірест"	Mechanical processing of metals	less than 25 mln. UAH
	1267876	PJSC "Kalush factory of building machines"	ПАТ "Калуський завод будівельних машин"	Metal structures	less than 25 mln. UAH
	22188458	PE "Instrument"	ПП "Інструмент"	Metal tool	less than 25 mln. UAH
	22184805	PJSC "Poberezkiy factory of press-up aggregates"	ПАТ "Поберезький завод пресових агрегатів"	Metal fastening	less than 25 mln. UAH
	19397649	LLC "Resources"	ТОВ "Ресурси"	Metal working	less than 25 mln. UAH
Ternopil region	21145613	SPE "Arma"	МПП "Арма"	Hardware (fasteners, tools, hinges, etc.)	50-100 mln. UAH
	907438	"Bulat" ALC	ТДВ "Булат"	Hardware for sewage systems (lattices, hatches, ladders, etc.)	25-50 mln. UAH
	37372689	"Research and	ТОВ "НВП	Reservoirs and	less than 25 mln. UAH

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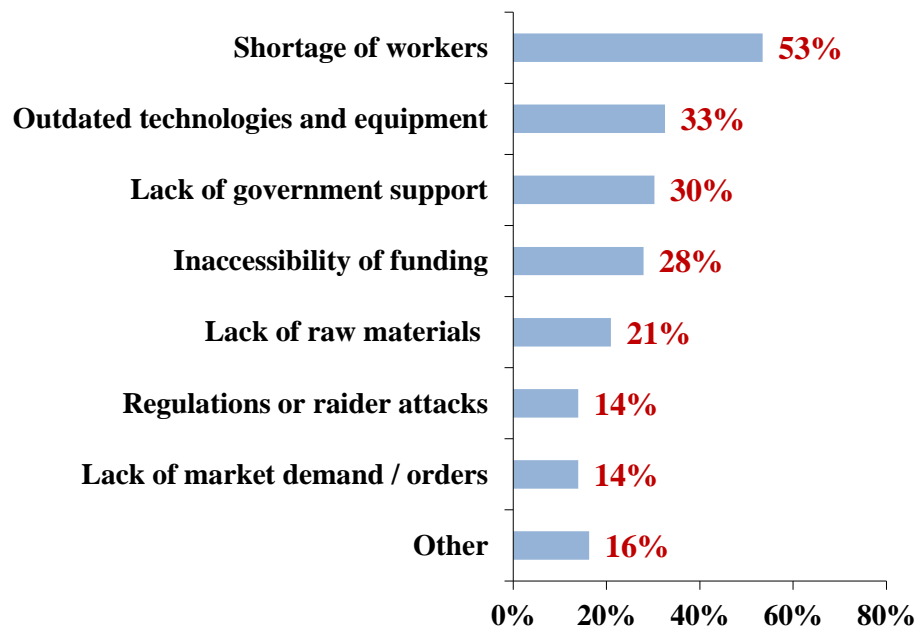
Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
		production company" Teplobak " LLC	"Теплобак"	capacities (storage units) are thermally insulated	
	37894502	PE "Rezhan Polisazh"	ПП "Режанс Полісаж"	Mechanical processing of metals	less than 25 mln. UAH
	37198551	"Agata Steel Construction" LLC	ТОВ "Агата Стальконструкція"	Doors, windows, doorsteps from black metal	less than 25 mln. UAH
	39458715	"Termobud-Karkas" LLC	ТОВ "Термобуд-Каркас"	Metal structures	less than 25 mln. UAH
	35578441	PE "ETK"	ПП "ETK"	Metal structures for power engineering	less than 25 mln. UAH
	4540395	"Repair and mechanical plant" Obriy " LLC	ТОВ "Ремонтно-механічний завод "Обрій"	Hardware are mechanically processed or stamped	less than 25 mln. UAH
	21134360	Cooperative "Iskra"	Кооператив "Іскра"	Hardware for sewage systems (lattices, hatches, ladders, etc.)	less than 25 mln. UAH
	31995151	LLC "Timeli"	ТОВ "Тімелі"	Hardware are mechanically processed or stamped	less than 25 mln. UAH
Lviv region	1267395	"Chervonogradsky Metallurgical Plant" ALC	ТДВ "Червоноградський завод металоконструкцій"	Metal structures	more than 100 mln. UAH
	35413712	"Ken-Pak Yavoriv" LLC	ТОВ "Кен-Пак Яворів"	Metal packaging	more than 100 mln. UAH
	32993129	Detailed Enterprise "Enji Metal Ukraine" Company N.Graversen Metalvarefabrik A / S	Дочірнє Підприємство "Ен Джі Метал Україна" Компанії Н.Граверсен Металварефабрик А/С	Metalware, hardware	more than 100 mln. UAH
	33775568	"Technoap UA" LLC	ТОВ "Технокап УА"	Metal packaging	more than 100 mln. UAH
	31754918	"Fakro Orbita" LLC	ТОВ "Факро Орбіта"	Metal doors and door constructions	more than 100 mln. UAH
	22415836	"Ekran" LLC	ТОВ "Екран"	Metal doors and windows	50-100 mln. UAH
	19177304	"Scientific-manufacturing company" Imvo " LLC	ТОВ "Науково-виробничє підприємство "Імво"	Metal structures	50-100 mln. UAH
	30648990	"Energomontazhventilyatsiya" LLC	ТОВ "Енергомонтажвентиляція"	Metal structures	50-100 mln. UAH
	33622032	"Ako Indastris" LLC	ТОВ "Ако Індастріс"	Metal structures	50-100 mln. UAH
	34814005	"CFT Ukraine" LLC	ТОВ "Сі Еф Ті Україна"	Metal structures	50-100 mln. UAH
Rivne region	24175498	PJSC "Agroresurs"	ПрАТ "Агроресурс"	Hardware	more than 100 mln. UAH
	36697006	"Metalwork factory" LLC	ТОВ "Завод металевих виробів"	Hardware and metalware	more than 100 mln. UAH
	30712400	"RV Metal Servis" LLC	ТОВ "Р.В.Метал Сервіс"	Hardware	50-100 mln. UAH
	38230905	"Metalkraft" LLC	ТОВ "Металкрафт"	Hardware	less than 50 mln. UAH
	39033541	"KTБ-Grup" LLC	ТОВ "КТБ-Груп"	Aluminum structures and facades	less than 50 mln. UAH

Region	ID code	Company name (English)	Company name (Ukrainian)	Product	Revenues
	36565365	PE "Retra-3M"	ПП "Ретра-3М"	Hardware	less than 50 mln. UAH
	36921697	PE "Production-Construction Association Manas"	ПП "Виробничо-Конструкторське Об'єднання "Маанс"	Metal structures	less than 50 mln. UAH
	38943141	PE "Gefest Profi"	ПП "Гефест-Профі"	Hardware	less than 50 mln. UAH
	32089535	"Rivnepobutprylad" LLC	ТОВ "Рівнепобутприлад"	Hardware	less than 50 mln. UAH
	25315667	"Gazotron-Vlatava" LLC	ТОВ "Газотрон-Влатава"	Hardware	less than 50 mln. UAH
Zakarpattia region	33484509	"Kruzhik Ukraine" LLC	ТОВ "Кружик Україна"	Hardware	less than 50 mln. UAH
	38107596	"Metalvorks" LLC	ТОВ "Металворкс"	Hardware	less than 50 mln. UAH
	33614535	"Oygen Pharion Ukraine" LLC	ТОВ "Ойген Фаріон Україна"	Metal tools	less than 50 mln. UAH
	34154265	"A-Lap" LLC	ТОВ "А-Лап"	Metal tools	less than 50 mln. UAH
	20449280	Joint Ukrainian-German Company "Technika" LLC	Спільне Українсько-Німецьке підприємство ТОВ "Техніка"	Metal tools	less than 50 mln. UAH
	32476963	"Viknoteh" LLC	ТОВ "Вікнотех"	Metal doors and metal structures	less than 50 mln. UAH
	35047676	PE "Nubius Group Lviv"	ПП "Нубіус Груп Львів"	Metal tools	less than 50 mln. UAH
	31230641	Subsidiary Enterprise "Nubius Ukraine" German Firm "Nubius Presesion Holdings GMBH"	Дочірнє Підприємство "Нубіус Україна" німецької фірми "Нубіус Прецезіонсверкцойге Г.М.Б.Х."	Metal tools	less than 50 mln. UAH
	32276142	"Factory Stearyt" LLC	ТОВ "Завод "Стеатит"	Hardware	less than 50 mln. UAH
33436345	"Karl Ukraine" LLC	ТОВ "Карла Україна"	Hardware	less than 50 mln. UAH	
Volyn region	31533318	"Production Association Kovelsilmash" LLC	ТОВ "Виробниче Об'єднання "Ковельсьільмаш"	Hardware	more than 100 mln. UAH
	34214554	"Volyn-Calvis" LLC	ТОВ "Волинь-Кальвіс"	Hardware	less than 50 mln. UAH
	31733107	PE "Premium-Ukraine"	ПП "Пребена-Україна"	Metal fastening	less than 50 mln. UAH
	35516228	"Mechanical-flexible factory" LLC	ТОВ "Механічно-Ливарний завод"	Cast metal products	less than 50 mln. UAH
	39224682	"Metaldors" LLC	ТОВ "Металдорс"	Metal windows and doors	less than 50 mln. UAH
	13367676	PJSC "Enko"	ПАТ "Енко"	Hardware	less than 50 mln. UAH
	33534140	PE "Denk TPD"	ПП "Денк ТПР"	Metal structures	less than 50 mln. UAH
	37490495	"Factory" Gorstal" LLC	ТОВ "Завод "Горсталь"	Hardware	less than 50 mln. UAH
	21750308	PJSC "Drink"	ПрАТ "Сяйво"	Hardware	less than 50 mln. UAH
39930091	"Volynstal" LLC	ТОВ "Волиньсталь"	Hardware	less than 50 mln. UAH	



**Key obstacles observed in the sector**

While identifying main obstacles for the development of metalworking in Western Ukrainian regions 54 companies were contacted, of which 43 (80%) agreed to participate in the survey, and 11 (20%) refused. The following figure shows the rating of the obstacles as perceived by enterprises.



**Fig. 3.48. The rating of main obstacles for the development of metalworking industry in Western Ukrainian regions**

The Ukrainian metalworking sector faces some important challenges. Interviewed companies accented the following key obstacles to growth: shortage of workers (53%), outdated technologies and equipment (33%) and lack of government support (30%).

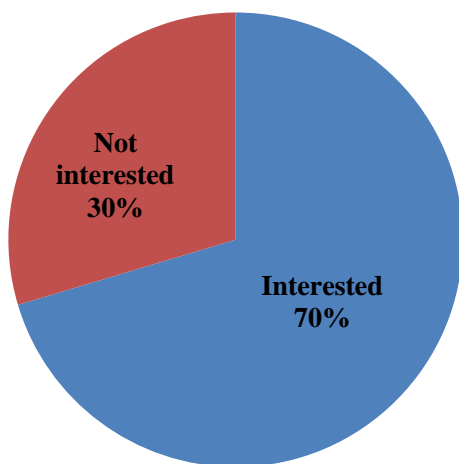
A greater part of metal processing enterprises in the studied region are old Soviet factories that are in urgent need of equipment modernization and improvement of the quality of manufactured products. The use of outdated equipment (high resource and energy consumption of production) and low quality 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.

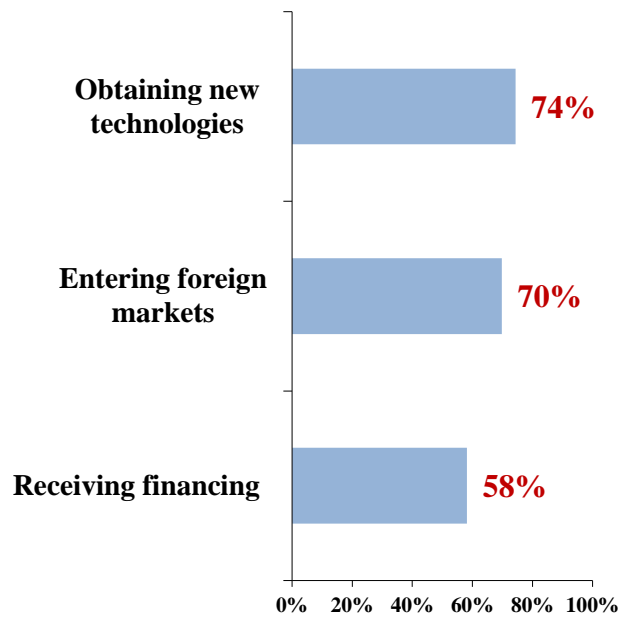
Modernization requires affordable long-term financing, with a lending rate of <10% per annum of at least 3 years. As for now, there are no state programs aimed at stimulating and supporting the modernization of industrial production (cheaper loans, lending rate compensation, etc.). There is also no effective 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 35-50% higher than export prices, which significantly reduces the profitability of metal-working enterprises.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 70% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in obtaining new technologies (74%), entering foreign markets (70%) and receiving financing (58%).



**Fig. 3.49. The interest of metalworking enterprises in cooperation with the Dutch business**



**Fig. 3.50. Main areas of potential cooperation with the Dutch business in the metalworking industry, %**

### 3.6. Machine building

#### General overview of the sector

In Western Ukrainian regions, there are 678 machine building enterprises, of which 414 are legal entities (61%), and 264 - individual entrepreneurs (39%).

The largest number of companies operates in Lviv region (269 units or 40%), and the least – in Chernivtsi region (53 units or 8%).

According to official statistics, the sector is employing 62 869 full-time employees, including 62 374 in legal entities (almost 99%), and 495 are employed by individual entrepreneurs (about 1%). It is worth to mention that the number of jobs created by individual entrepreneurs could be significantly underestimated because of opportunities for shadow activity (personal income tax and payroll payment aversion) in this segment.

The sector leader by the number of employees is Lviv region (21 347 people or 34%), while the smallest employment in the sector is in Chernivtsi region (1 598 people or 3%).

**Table 3.30. Number of functioning enterprises and employment in machine building in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	27	26	53	1 558	40	1 598
Ivano-Frankivsk region	63	27	90	5 045	49	5 094
Lviv region	157	112	269	21 159	188	21 347
Rivne region	38	23	61	1 690	36	1 726
Ternopil region	43	31	74	6 638	60	6 698
Zakarpattia region	44	24	68	16 591	47	16 638
Volyn region	42	21	63	9 693	75	9 768
<b>Total Western Ukraine regions</b>	<b>414</b>	<b>264</b>	<b>678</b>	<b>62 374</b>	<b>495</b>	<b>62 869</b>

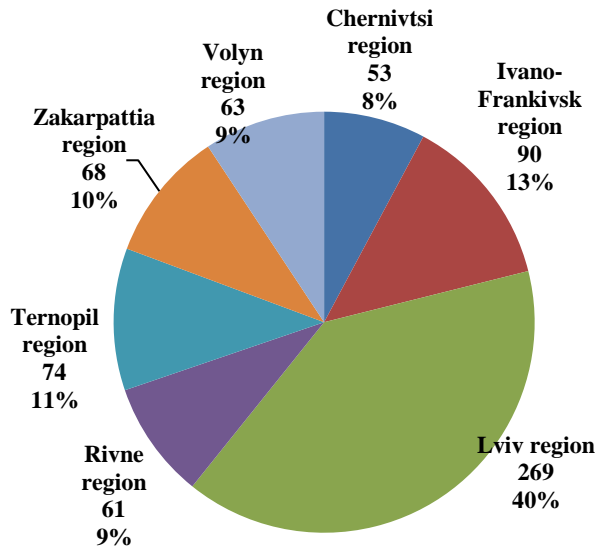


Fig. 3.51. Breakdown of machine building enterprises by regions, units.

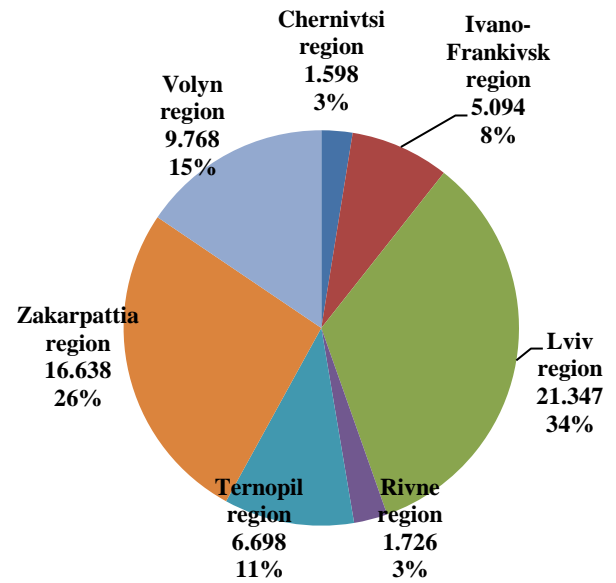
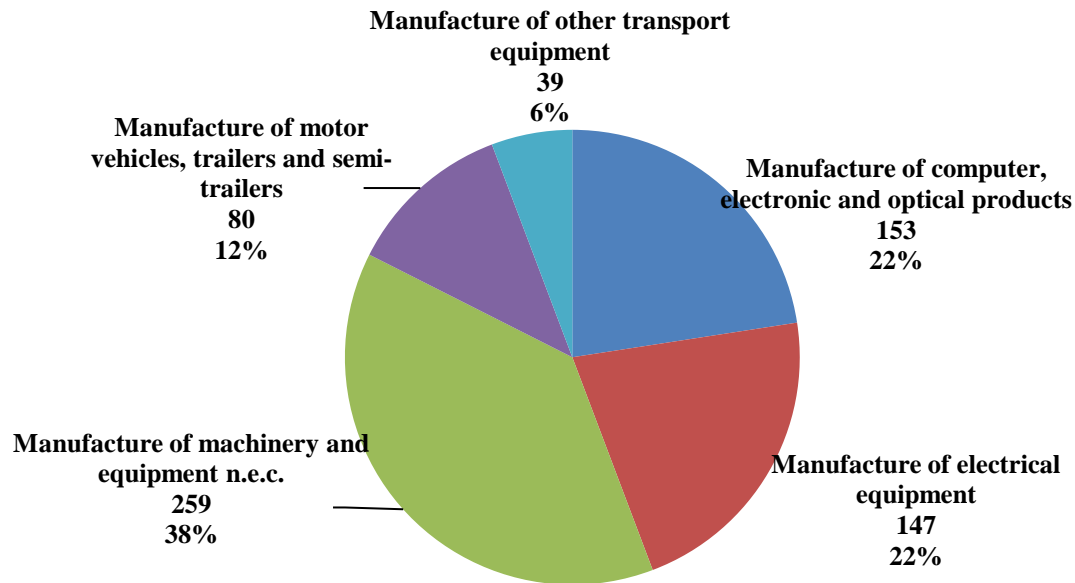


Fig. 3.52. Regional employment structure in machine building, people

In terms of sub-sectors, the largest number of enterprises operates in the manufacture of other machinery and equipment (38%), and the smallest - in the manufacture of other transport equipment (6%).

Table 3.31. Number of functioning machine building enterprises by regions and subsectors

Regions	Manufacture of computer, electronic and optical products	Manufacture of electrical equipment	Manufacture of machinery and equipment n.e.c.	Manufacture of motor vehicles, trailers and semi-trailers	Manufacture of other transport equipment	Total
Chernivtsi region	15	5	18	10	5	53
Ivano-Frankivsk region	23	19	37	8	3	90
Lviv region	67	63	98	26	15	269
Rivne region	9	14	30	7	1	61
Ternopil region	15	22	26	5	6	74
Zakarpattia region	17	13	21	15	2	68
Volyn region	7	11	29	9	7	63
<b>TOTAL</b>	<b>153</b>	<b>147</b>	<b>259</b>	<b>80</b>	<b>39</b>	<b>678</b>



**Fig. 3.53. Breakdown of machine building enterprises by subsectors, units**

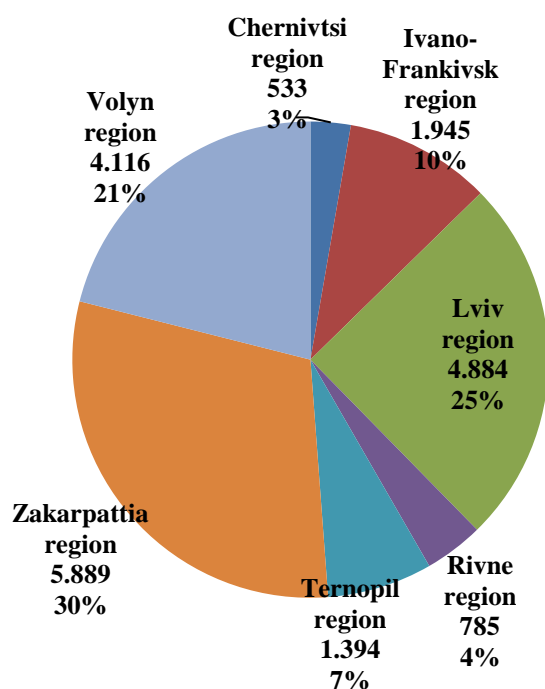
### Sales

In 2016, sales volume of machine building products amounted to about UAH 3 872 million, of which UAH 3 847 million were generated by legal entities (99%), and the rest UAH 25 million – by individual entrepreneurs (about 1%).

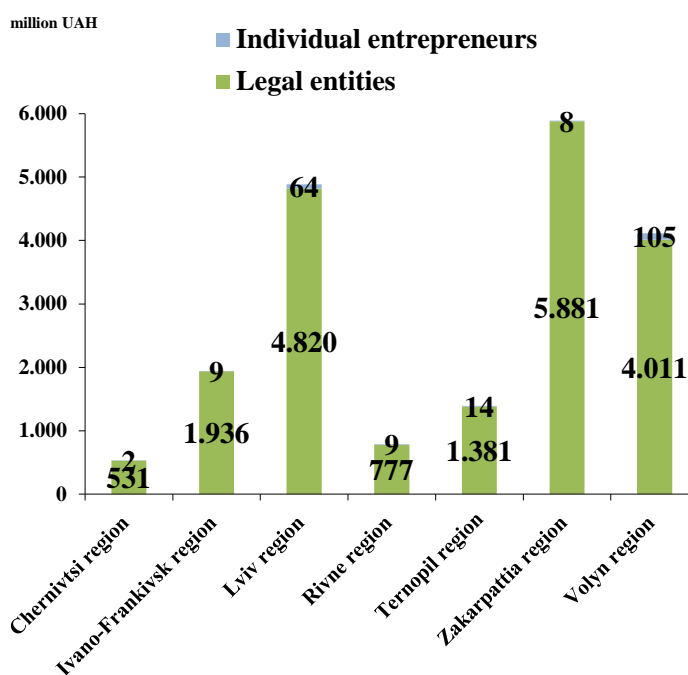
In the regional structure, leaders are Zakarpattia region (UAH 5 889 million or 30% of sales), Lviv region (UAH 4 884 million or 25%) and Volyn region (UAH 4 116 million or 21%). Together, these regions account for more than 75% of machine building products sales among Western Ukrainian regions.

**Table 3.32. The volume of sales of machine building enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	530,6	2,2	532,8
Ivano-Frankivsk region	1 935,9	8,6	1 944,5
Lviv region	4 819,9	64,2	4 884,1
Rivne region	776,7	8,6	785,3
Ternopil region	1 380,7	13,6	1 394,3
Zakarpattia region	5 881,4	7,9	5 889,3
Volyn region	4 010,7	105,1	4 115,9
<b>Total Western Ukraine regions</b>	<b>19 336,0</b>	<b>210,3</b>	<b>19 546,3</b>



**Fig. 3.55. Regional sales of machine building products, million UAH**



**Fig. 3.56. Regional sales of machine building products by type of business entity, million UAH**

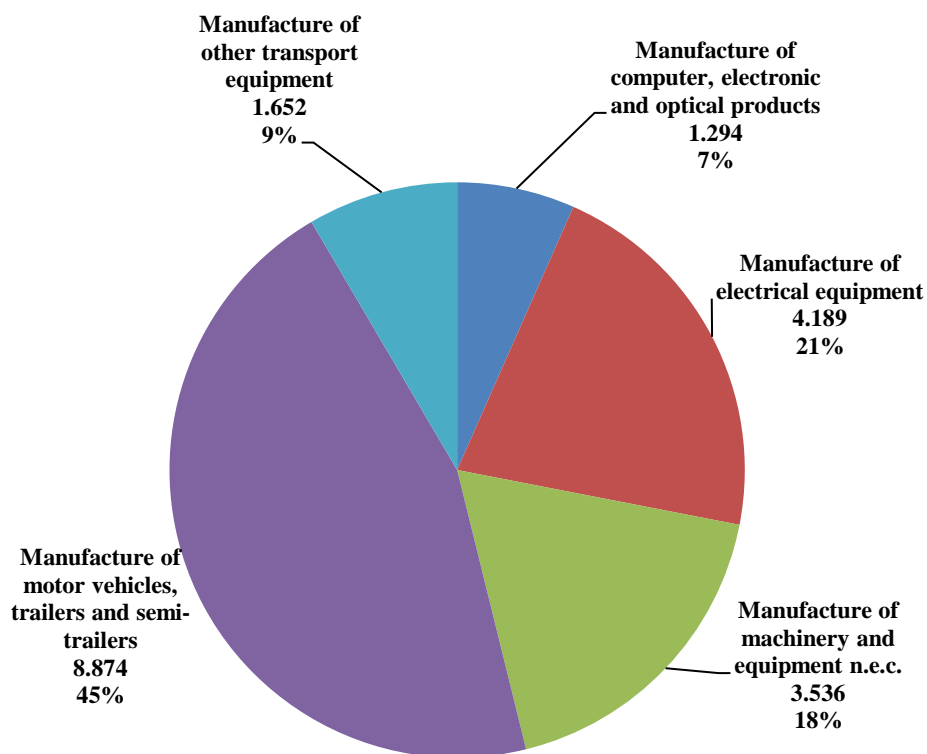
In the commodity structure of sales, equipment for motor vehicles, trailers and semi-trailers dominates (45% of total sales of the sector). Computer, electronic and optical products production prevails in Zakarpattia region (sales volume – UAH 198 million or 52%), electrical equipment production in Ivano-Frankivsk region (UAH1 1 182 million or 28%), other machinery and equipment production in Zakarpattia region (UAH1 1 971 million or 56%), motor vehicles production and accessories in Zakarpattia region (UAH 4 166 mln. or 47%) and other transport equipment in Lviv region (UAH 931 mln. or 56%).

According to the results of companies' survey, the average level of sales through retail networks in machine building production is about 7%.

**Table 3.33. Sales of machine building in 2016 by subsectors, mln. UAH**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Manufacture of computer, electronic and optical products	197,6	35,1	266,7	24,1	65,1	667,7	38,0	1 294,3
Manufacture of electrical equipment	23,7	1 181,6	832,7	508,7	609,3	918,7	114,6	4 189,3
Manufacture of machinery and equipment n.e.c.	304,1	168,0	710,8	187,2	66,4	128,7	1 971,0	3 536,2

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Manufacture of motor vehicles, trailers and semi-trailers	7,3	513,0	2 143,5	65,3	647,3	4 165,6	1 332,1	8 874,2
Manufacture of other transport equipment	0,2	46,9	930,5	0,0	6,1	8,6	660,2	1 652,4
<b>TOTAL</b>	<b>532,8</b>	<b>1 944,5</b>	<b>4 884,1</b>	<b>785,3</b>	<b>1 394,3</b>	<b>5 889,3</b>	<b>4 115,9</b>	<b>19 546,3</b>

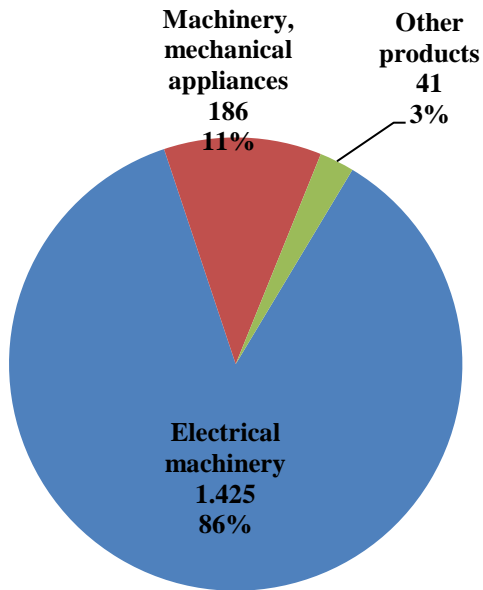


**Fig. 3.57. Sales of machine building by subsectors, mln. UAH**

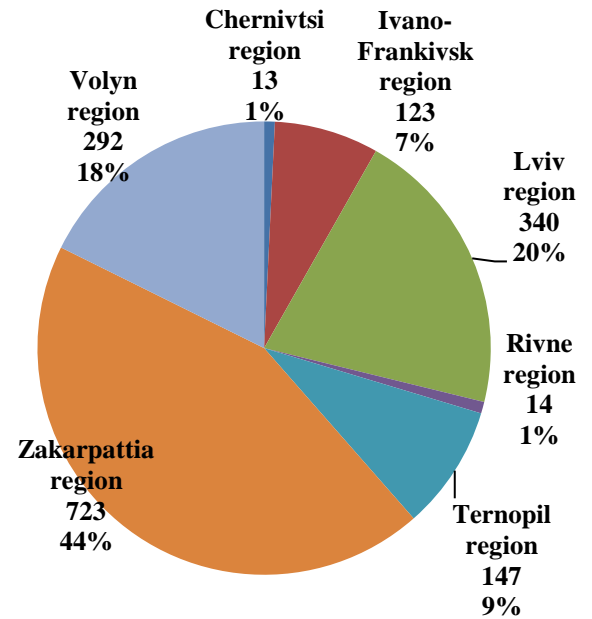
### Export

In 2016, the volume of machine building products exports in Western Ukrainian regions amounted to about USD 1 651.6 million, of which almost 64% was generated by Zakarpattia region (USD 723 million) and Lviv region (USD 340 million).

Electrical machinery and equipment dominate in the commodity structure of exports (86% of total exports of the sector), consisting mainly of cables for the automotive industry.



**Fig. 3.58. Export structure of machine building products, million USD**



**Fig. 3.59. Regional breakdown of machine building products export, million USD**

**Table 3.34. The volume of export by machine building companies in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Electrical machinery and equipment and parts thereof	4 542	90 784	306 020	3 038	134 144	671 497	214 735	1 424 760
Machinery, mechanical appliances, parts thereof	7 853	31 982	24 020	10 173	1 547	40 599	69 633	185 807
Vehicles other than railway or tramway rolling stock, and parts and accessories thereof		205	2 572	418	376	4 747	3 556	11 874
Optical, photographic, cinematographic, measuring, checking, precision, medical	119	118	3 042	30	713	6 243	349	10 614
Lamps and lighting fittings					9 421			9 421
Aircraft, spacecraft, and parts thereof			4 486					4 486
Railway or tramway locomotives, rolling stock and parts thereof	68		145			104	3 751	4 067
Clocks and watches and parts thereof			69		460	21		549
Ships, boats and floating structures		46				27		73
<b>Total</b>	<b>12 581</b>	<b>123 136</b>	<b>340 353</b>	<b>13 659</b>	<b>146 661</b>	<b>723 238</b>	<b>292 023</b>	<b>1 651 652</b>



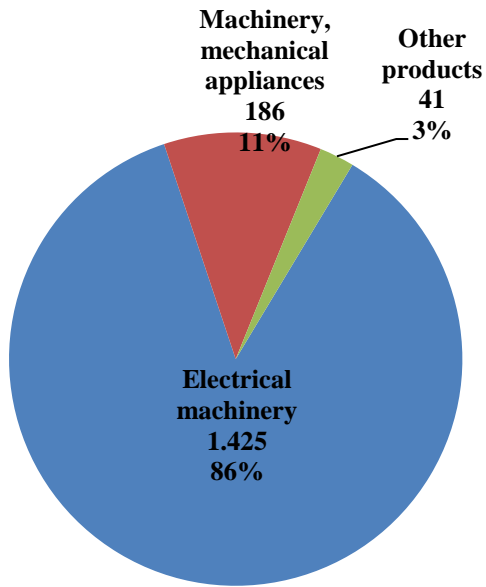


Fig. 3.58. Export structure of machine building products, million USD

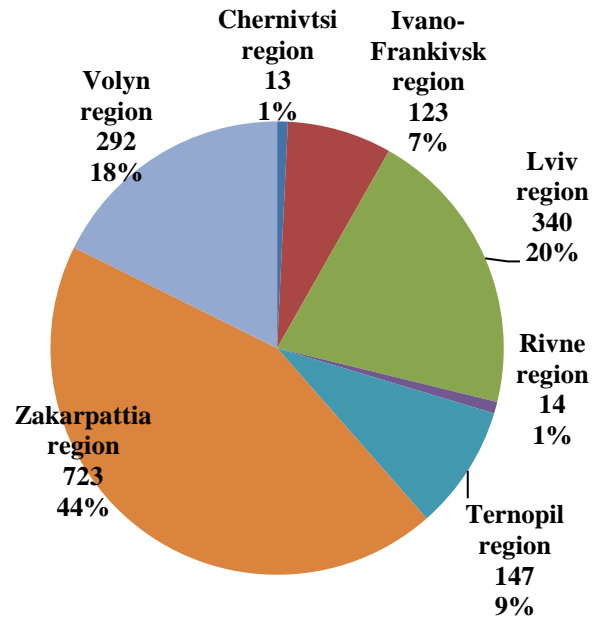


Fig. 3.59. Regional breakdown of machine building products export, million USD

**Leading companies of the sector**

The main machine building companies in Western Ukrainian regions in terms of sales volume are PJSC "SKF Ukraine", PJSC "Eurocar" and "Yazaki Ukraine" LLC. Among major machine-building enterprises, automotive sector companies dominate (5 out of the 10 largest in terms of sales).

**Table 3.35. Leading machine building companies**

ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
5745160	PJSC "SKF Ukraine"	ПАТ "СКФ Україна"	Bearings	more than 100 mln. UAH
30913130	PJSC Eurocar	ПрАТ "Єврокар"	Car manufacturing	more than 100 mln. UAH
32269989	"Yadzaki Ukraine" LLC	ТОВ "Ядзакі Україна"	Circuit harnesses for cars	more than 100 mln. UAH
31358171	LLC " LEONI Wiring Systems UA GmbH"	ТОВ "Леоні Ваєрінг Системс УА ГМБХ"	Circuit harnesses for cars	more than 100 mln. UAH
37183000	Electrolux Ukraine LLC	ТОВ "Електролюкс Україна"	Washing machines	more than 100 mln. UAH
33537560	"Kromberg and Schubert Ukraine" LLC	ТОВ "Кромберг Енд Шуберт Україна "	Electric equipment for engines	more than 100 mln. UAH
32836226	Jabil Circuit Ukraine Ltd LLC	ТОВ "Джейбіл Сьоркіт Юкрейн Лімітед"	Electrical and radio components	more than 100 mln. UAH
8029701	SE "Lutsk repair plant" Motor "	ДП "Луцький ремонтний завод "Мотор"	Repair of aviation engines	more than 100 mln. UAH
34419383	"SE Bordnetze-Ukraine" LLC	ТОВ "СЕ Борднетце - Україна"	Electro-cable products for automobiles	more than 100 mln. UAH
33285430	"Gentherm Ukraine" LLC	ТОВ "Джентерм Україна"	Electronic car seat heater systems	more than 100 mln. UAH

Regional distribution of the largest companies in the sector is shown in Table 3.36.

**Table 3.36. Top-10 companies of machine building by region**

Region	ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
Chernivtsi region	30045061	"Mashzavod" LLC	ТОВ "Машзавод"	Devices for oil refining and petrochemical enterprises	more than 100 mln. UAH
	14314676	"Kvarz" Factory ALC	ТДВ "Завод "Кварц"	Semiconductor equipment	more than 100 mln. UAH
	30150047	PE "Arton"	ПП "Артон"	Fire alarm systems	50-100 mln. UAH
	22847240	ALC "SKB Elektronmash"	ТДВ "СКБ "Електронмаш"	Fire alarm systems	less than 25 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
	37240283	Private scientific-Manufacturing company "Artar-Plus"	ПНВП "Артар-Плюс"	Fire alarm systems	less than 25 mln. UAH
	14261690	Manufacturing company "Vector-08" LLC	ТОВ ВП "Вектор-08"	Concrete mixers or mortar mixers	less than 25 mln. UAH
	211530	"Sokiryany machine-building plant" ALC	ТДВ "Сокирянський машинобудівний завод"	Parts for hydraulic and pneumatic power equipment	less than 25 mln. UAH
	14261939	"Interm" LLC	ТОВ "Інтерм"	Semiconductor equipment	less than 25 mln. UAH
	34839119	"Simbad" LLC	ТОВ "Сімбад"	Electro-cable products for automobiles	less than 25 mln. UAH
	14264102	Collective Enterprise "Sigma"	Колективне Підприємство "Сіґма"	Fire alarm systems	less than 25 mln. UAH
Ivano-Frankivsk region	37183000	Electrolux Ukraine LLC	ТОВ "Електролюкс Україна"	Washing machines	more than 100 mln. UAH
	19389809	State Enterprise "Production Association" Karpaty"	ДП "Виробниче Об'єднання "Карпати"	Electro-cable products for automobiles	more than 100 mln. UAH
	34078038	Tyco Electronics Ukraine Limited	ТОВ "Тайко Електронікс Юкрейн Лімітед"	Electro-cable products for automobiles	more than 100 mln. UAH
	31789596	LLC "Elektrosvit"	ТОВ "Електроsvіт"	Transformer substations and switchgears	50-100 mln. UAH
	13655435	PrJSC "Ivano-Frankivsk locomotive repair plant"	ПрАТ "Івано-Франківський локомотиворемонтний завод"	Units and parts for locomotives of railways, cars, trams	25-50 mln. UAH
	30342270	PE "Tehnoresurs"	ПП "Техноресурс"	Equipment, components and spare parts for enterprises in the oil and gas industry	25-50 mln. UAH
	30913256	PE "Prikarpatkabel"	ПП "Прикарпат-кабель"	Cable products	25-50 mln. UAH
	25570106	PE "Mechanic"	ПП "Механік"	Equipment for oil and gas industry enterprises	25-50 mln. UAH
	218271	PJSC "Ivano-Frankivsk armature factory"	ПАТ "Івано-Франківський арматурний завод"	Catches, shutters	25-50 mln. UAH
	31767436	LLC "Tekhmash"	ТОВ "Техмаш"	Parts for machines and mechanical devices	less than 25 mln. UAH
Ternopil region	34419383	"SE Bordnetze-Ukraine" LLC	ТОВ "СЕ Борднетце - Україна"	Electro-cable products for automobiles	more than 100 mln. UAH
	231024	"Shreder" LLC	ТОВ "Шредер"	Outdoor lighting fixtures	more than 100 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
	33680115	"OSP Vatra Corporation " LLC	ТОВ "ОСП Корпорація Ватра"	Fixtures and floodlights for industrial, office and public use	more than 100 mln. UAH
	33680419	"Sayuz" LLC	ТОВ "Саюз"	Ventilation cabinets	more than 100 mln. UAH
	3056917	"Rempobuttekhnika" Factory LLC	ТОВ Завод "Ремпобуттехніка"	Ballast for gas and discharge lamps and tubes	50-100 mln. UAH
	22607719	PJSC "Ternopil Radioplant Orion "	ПАТ "Тернопільський Радіозавод"Оріон"	Professional communication facilities	50-100 mln. UAH
	21167170	"Production-Commercial Enterprise "Vatra" LLC	ТОВ "Виробничо-Комерційне Підприємство "Ватра"	Lamps and lighting equipment	50-100 mln. UAH
	32578132	Project-Production Firm Elektrosvit LLC	ТОВ "Проектно-Виробнича Фірма Електросвіт"	Lamps for greenhouse, industrial, sports, administrative, architectural, outdoor lighting, lamps for poultry	25-50 mln. UAH
	217024	PJSC "Techinmash"	ПАТ "Техінмаш"	Metal shapes for reinforced concrete structures, non-standard equipment, modernization and repair of construction equipment	less than 25 mln. UAH
	21131678	"Gas Equipment Plant" Alpha-Gazpromkomplekt" LLC	ТОВ "Завод Газового Обладнання "Альфа-Газпромкомплект"	Gas equipment	less than 25 mln. UAH
Lviv region	31358171	"Leoni Vaering Systems UA GmbH" LLC	ТОВ "Леоні Ваерінг Системс Уа ГМБХ"	Circuit harnesses for cars	more than 100 mln. UAH
	214244	PJSC Iskra	ПАТ "Іскра"	Lamps and lighting fixtures	more than 100 mln. UAH
	7684556	SE "Lviv State Aviation-Repair Plant"	ДП "Львівський Державний Авіаційно-Ремонтний Завод"	Repair of airplanes	more than 100 mln. UAH
	35101874	"Elektrokontakt Ukraine" LLC	ТОВ "Електроконтакт Україна"	Cables and wiring systems	more than 100 mln. UAH
	37965405	"Joint-Ukrainian-German Company" Elektrontrans " LLC	ТОВ "Спільне Українсько-Німецьке Підприємство "Електронтранс"	Electric transport and metal working	more than 100 mln. UAH
	32511578	"ODV-Electric" LLC	ТОВ "ОДВ-Електрик"	Electrical equipment for engines and vehicles	more than 100 mln. UAH

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Region	ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
	740599	PJSC "Lviv Locomotive Building Plant"	ПрАТ "Львівський Локомотиворемонтний Завод"	Capital repair of locomotives	more than 100 mln. UAH
	39768870	"Lviv Plant Rema" LLC	ТОВ "Львівський Завод РЕМА"	Medical equipment	more than 100 mln. UAH
	7985602	State Enterprise "Lviv Bronetankovy Factory"	Державне Підприємство "Львівський Бронетанковий Завод"	Armored vehicles	more than 100 mln. UAH
	33359491	PE "Firm" Galich-Cable "	ПП "Фірма "Галич-Кабель"	Cables	more than 100 mln. UAH
Rivne region	13970259	"Production Company" Akvaton" LLC	ТОВ "Виробниче Підприємство "Акватон"	Cables	more than 100 mln. UAH
	34704105	"High-Speed Union-RZWA" LLC	ТОВ "Високовольтний Союз-РЗВА"	High-voltage equipment	more than 100 mln. UAH
	33001226	"ARM-Eco" LLC	ТОВ "АРМ-Еко"	Industrial and commercial equipment, elevators and lifts, windows, granite products	50-100 mln. UAH
	13979385	PE "Patar"	ПП "Патар"	Castings	50-100 mln. UAH
	21081867	Private Small Enterprise - Scientific And Production Firm "Prodecology"	Приватне Мале Підприємство - Науково-Виробнича Фірма "Продекологія"	Magnetic separators and metal detectors	50-100 mln. UAH
	39355047	"Tehnoprivod" LLC	ТОВ "Технопривод"	Bearings, gears, mechanical gears and drives	less than 50 mln. UAH
	30716613	"Ukrbital" LLC	ТОВ "Ukrbital "	Biological wastewater treatment equipment	less than 50 mln. UAH
	38623245	"Kvasilivsky Livarno-Mechanical Factory" LLC	ТОВ "Квасилівський Ливарно-Механічний Завод"	Cast and forged products	less than 50 mln. UAH
	33001116	PE "Autotechnology"	ПП "Автотехнологія"	Bus manufacturing	less than 50 mln. UAH
38895125	"Ekhz Technology" LLC	ТОВ "ЕХЗ Технології"	Electro conductive polymers for corrosion protection	less than 50 mln. UAH	
Zakarpattia region	30913130	Evrocar PJSC	ПрАТ "Єврокар"	Car manufacturing	more than 100 mln. UAH
	32269989	"Yadzaki Ukraine" LLC	ТОВ "Ядзакі Україна"	Circuit harnesses for cars	more than 100 mln. UAH
	32836226	Jabil Sarket Yukryn Limited LLC	ТОВ "Джейбіл Сьоркіт Юкрєйн	Electrical and radio components	more than 100 mln. UAH

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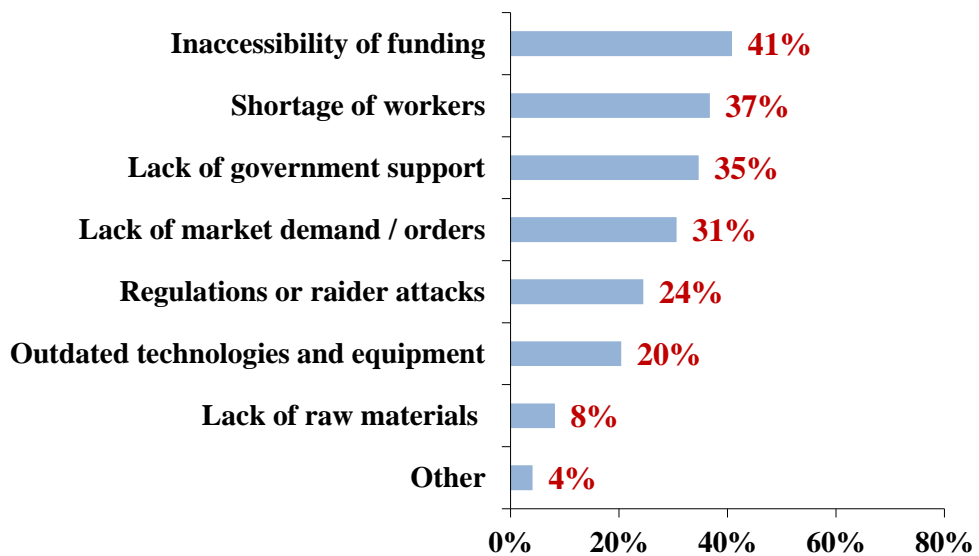
Region	ID code	Company name (English)	Company name (Ukrainian)	Activity/products	Revenues
			Лімітед"		
	33285430	"Ghenterm Ukraine" LLC	ТОВ "Джентерм Україна"	Electronic car seat heater systems	more than 100 mln. UAH
	32221224	Flexronix Factory LLC	Завод "Флекстрікс ТЗОВ"	Electronic components for medical equipment, consumer electronics, home appliances, television and media	more than 100 mln. UAH
	32653583	"Forshner Ukraine" LLC	ТОВ "Форшнер Україна"	Circuit harnesses for automobiles	more than 100 mln. UAH
	14307452	PJSC "Mukachivskiy Factory" Точпилад"	ПАТ "Мукачівський Завод "Точприлад"	Cables, electronic products and components	more than 100 mln. UAH
	30104493	"Factory" Konvektor" LLC	ТОВ "Завод "Конвектор"	Metal working	more than 100 mln. UAH
	33476189	"Bereg-Cable Of GmbH" LLC	ТОВ "Берег-Кабель ГМБХ"	Circuit harnesses for automobiles	50-100 mln. UAH
	153608	PJSC "Uzhhorodsky Turbogaz"	ПАТ "Ужгородський Турбогаз"	Equipment for oil and gas industry	50-100 mln. UAH
Volyn region	5745160	PJSC "SCF Ukraine"	ПАТ "СКФ Україна"	Bearings	more than 100 mln. UAH
	33537560	"Kromberg End Shubert Ukraine" LLC	ТОВ "Кромберг Енд Шуберт Україна"	Electric equipment for engines	more than 100 mln. UAH
	8029701	State Enterprise "Lutsk Repair Plant" Motor "	ДП "Луцький Ремонтний Завод "Мотор"	Repair of aviation engines	more than 100 mln. UAH
	21752230	Subsidiary Enterprise "Avtoskladalnyj Factor №1" Pjsc "Automobile Company" Bogdan Motors"	ДП "Автоскладальний Завод №1" Пат "Автомобільна Компанія "Богдан Моторс"	Bus manufacturing	more than 100 mln. UAH
	36064089	"Production Enterprise" Elektroservis" LLC	ТОВ "Виробниче Підприємство "Електросервіс"	Electrical work	50-100 mln. UAH
	32578653	"Khan-Electrobuu Ukraine" LLC	ТОВ "Хан-Електробау Україна"	Transformers for the electronics industry	50-100 mln. UAH
	225644	PJSC "Electrothermometry"	ПАТ "Електротермометрія"	Water counters	less than 50 mln. UAH
	39611656	"Modern-Engineering" LLC	ТОВ "Модерн-Інжиніринг"	Metal working machines	less than 50 mln. UAH
	35546980	"Hadea Table Company" LLC	ТОВ "Хадея Стіл Компанія"	Metal working	less than 50 mln. UAH
	37204601	"Zakhid-Agroservis Plus" LLC	ТОВ "Захід-Агросервіс Плюс"	Machines and equipment for agriculture and forestry	less than 50 mln. UAH

There are some observations regarding specialization of machine-building enterprises:

- There are transport engineering clusters in Zakarpattia and Lviv region;
- The largest manufacturers of automobile wiring harness (9 enterprises) are concentrated in the studied area;
- Lighting equipment manufacturers are located in Ternopil region;
- In Chernivtsi region there are 4 large manufacturers of fire alarm systems.

### **Key obstacles observed in the sector**

Within the framework of identifying the main obstacles for the development of machine building in the Western Ukrainian regions 66 companies were contacted, of which 49 (74%) agreed to participate in the survey, and 17 (26%) refused. The following figure shows the rating of the obstacles as they perceived by enterprises.



**Fig. 3.60. The rating of main obstacles for the development of machine building industry in Western Ukrainian regions**

Interviewed companies stressed the following key barriers to growth: inaccessibility of funding (41%), shortage of workers (37%) and lack of government support (35%).

The rating of challenges in the Ukrainian machine building industry is a bit different from other sectors.

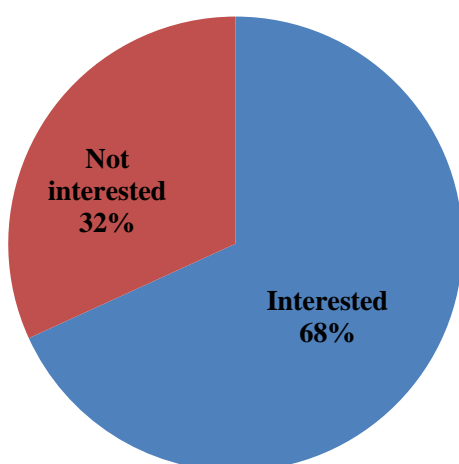
Inaccessibility of funding was cited the most frequently by respondents among main obstacles for development. The funding is required to acquire fixed assets as well as to expand working capital for new orders. The obstacles are the high cost of loans and the limited terms for which they are issued.

Lack of labour is ranked second among challenges. The problem includes a deficit of both highly skilled employees and low-skilled workers. The reasons are labour migration, presence of large labour-intensive enterprises and insufficient labour supply from local vocational educational institutions and universities.

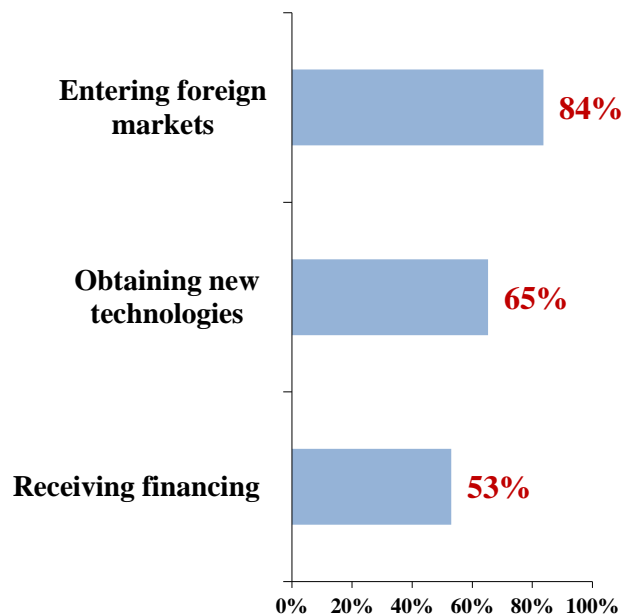
The lack of government support is ranked third. The industry suffered the most from the loss of the Russian market, which accounted for more than 60% of sales prior to 2014. As of 2018, enterprises in the sector were still not able to fully compensate for these losses. Access to the European market remains a challenge due to the requirements of product certification in the absence of local certification laboratories accredited according to EU standards, as well as high competition in European countries. Enterprises complain about insufficient government procurement, in particular, in the defence sector, opaque tenders, lack of the government-backed mechanism to reduce the cost of financing, in particular, through leasing programs for the purchase of domestic machine-building products.

During the interviews, respondent companies also mentioned as important problem destroyed local supply chains and the need to search for the new suppliers abroad at less favourable terms.

The survey also investigated a potential for cooperation with the Dutch business. Thus, about 68% of the interviewed machines building enterprises have shown interest in cooperation with the Dutch companies, first of all in entering foreign markets (84%) and obtaining new technologies (65%, Fig. 3.62).



**Fig. 3.61. The interest of machine building enterprises in cooperation with the Dutch business**



**Fig. 3.62. Main areas of potential cooperation with the Dutch business in the machine building industry, %**



### 3.7. Furniture production

#### General overview of the sector

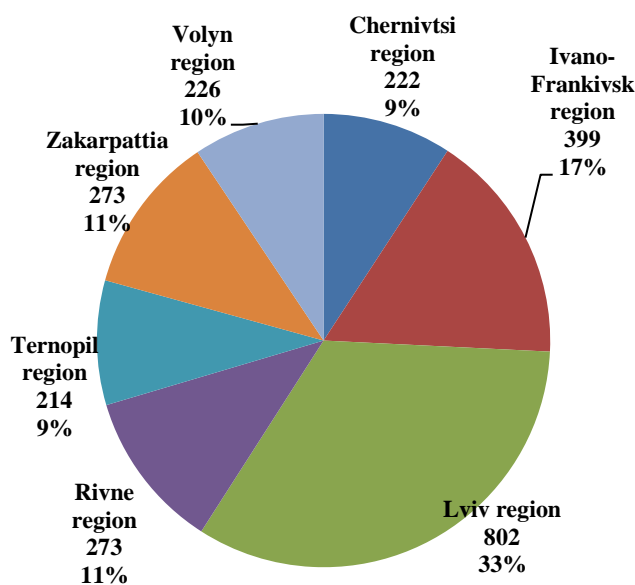
In Western Ukrainian regions, there are 2 409 enterprises producing furniture, of which 285 are legal entities (12%), and 2 124 - individual entrepreneurs (88%).

The largest number of companies operates in Lviv region (802 units or 33%), and the least – in Ternopil region (214 units or 9%).

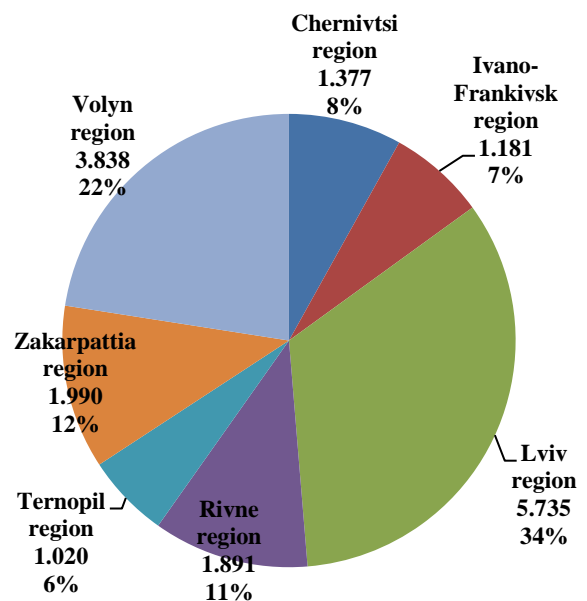
The sector is employing 17 032 full-time employees, including 12 577 in legal entities (about 74%), and 4 455 are employed by individual entrepreneurs (26%). The sector's leader by the number of employees is Lviv region (5 735 people or 34%), while the smallest employment in the sector is in Ternopil region (1 020 people or 6%).

**Table 3.37. Number of functioning enterprises and employment in furniture production in 2016**

Region	Number of companies, units			Employment, people		
	Legal entities	Individual entrepreneurs	Total	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	22	200	222	1 025	352	1 377
Ivano-Frankivsk region	46	353	399	477	704	1 181
Lviv region	123	679	802	4 220	1 515	5 735
Rivne region	21	252	273	1 442	449	1 891
Ternopil region	29	185	214	565	455	1 020
Zakarpattia region	23	250	273	1 542	448	1 990
Volyn region	21	205	226	3 306	532	3 838
<b>Total Western Ukraine regions</b>	<b>285</b>	<b>2 124</b>	<b>2 409</b>	<b>12 577</b>	<b>4 455</b>	<b>17 032</b>



**Fig. 3.63. Breakdown of furniture production enterprises by regions, units.**



**Fig. 3.64. Regional employment structure in furniture production, people**

## Sales

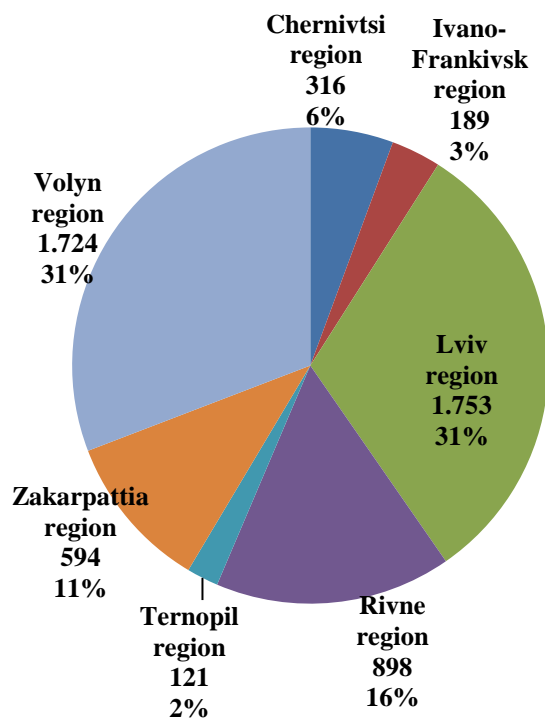
In 2016, sales volume of furniture amounted to about UAH 5 594 million, of which UAH 4 949 million were generated by legal entities (88%), and the rest UAH 644 million – by individual entrepreneurs (about 12%).

In the regional structure, the leaders are Lviv region (UAH 1 753 million or 31% of sales), Volyn region (UAH 1 724 million or 31%) and Rivne region (UAH 898 million or 16%). Together, these regions account for more than 78% of furniture sales among Western Ukrainian regions.

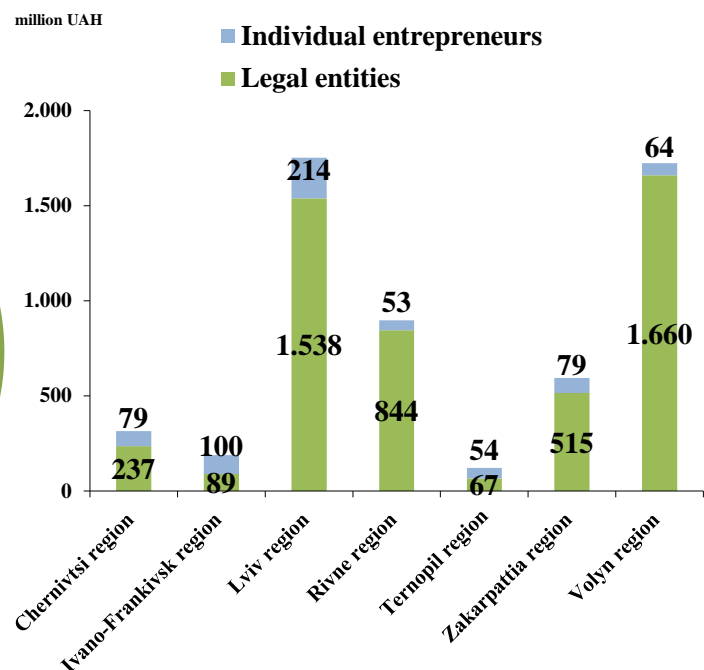
According to the results of companies' survey, the average level of sales through retail networks in furniture production is about 36%.

**Table 3.38. The volume of sales of furniture production enterprises in 2016, mln. UAH**

Region	Sales, million UAH		
	Legal entities	Individual entrepreneurs	Total
Chernivtsi region	236,7	78,9	315,6
Ivano-Frankivsk region	88,6	100,5	189,1
Lviv region	1 538,4	214,1	1 752,6
Rivne region	844,4	53,3	897,7
Ternopil region	66,5	54,1	120,6
Zakarpattia region	514,8	79,0	593,8
Volyn region	1 659,8	64,5	1 724,3
<b>Total Western Ukraine regions</b>	<b>4 949,3</b>	<b>644,4</b>	<b>5 593,7</b>



**Fig. 3.65. Regional sales of furniture production products, million UAH**



**Fig. 3.66. Regional sales of furniture production products by type of business entity, million UAH**

**Production**

The volumes of furniture production in 7 regions under investigation are given in the Table.

In the segment of **furniture for sitting with a wooden frame** (chairs) a large producer is Zakarpattia region (448-1 061 thousand pieces / year), with a share of almost 40-55% of the total Ukrainian production.

In the **office and commercial furniture** segment, all Western Ukrainian regions have combined share of 25-30% of the total Ukrainian production.

In the segment of **kitchen furniture** Lviv region is a large producer with production volumes of 120-180 thousand units per year (about 18% of the total Ukrainian production).

In the segment of **wooden furniture for bedrooms**, dining rooms and living rooms, seven regions are large producers, with a total share of about 60% of the total Ukrainian production.

**Table 3.39. Volume of production of certain types of furniture in 2014-2016, pcs.**

<b>Product, region</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Seats, primarily with wooden frames</b>			
Chernivtsi region	143 160	122 331	140 803
Ivano-Frankivsk region	3 404	4 425	3 885
Ternopil region	1 411	1 678	1 621
Rivne region	108 977	117 452	128 599
Volyn region	916	...*	...*
Zakarpattia region	1 061 054	286 468	448 323
Lviv region	279 271	185 982	217 931
<b>Subtotal in 7 regions</b>	<b>1 598 193</b>	<b>718 336</b>	<b>941 162</b>
<b>Total production in Ukraine</b>	<b>1 917 092</b>	<b>1 453 631</b>	<b>1 114 935</b>
<b>Share of 7 regions in Ukraine's production</b>	<b>83,4%</b>	<b>49,4%</b>	<b>84,4%</b>
<b>Office and shop furniture</b>			
Chernivtsi region	1 666	2 249	3 129
Ivano-Frankivsk region	6 233	5 323	4 646
Ternopil region	...*	6 175	4 866
Rivne region	2 931	2 863	4 804
Volyn region	263 043	275 640	306 560
Zakarpattia region	...*	...*	...*
Lviv region	13 745	141 045	16412
<b>Subtotal in 7 regions</b>	<b>287 618</b>	<b>433 295</b>	<b>340 417</b>
<b>Total production in Ukraine</b>	<b>1 399 594</b>	<b>1 369 907</b>	<b>1 341 139</b>
<b>Share of 7 regions in Ukraine's production</b>	<b>20,6%</b>	<b>31,6%</b>	<b>25,4%</b>
<b>Kitchen furniture</b>			
Chernivtsi region	8 138	8 363	13 146
Ivano-Frankivsk region	108	101	108
Ternopil region	36 778	49 546	30 223
Rivne region	287	158	351

Product, region	2014	2015	2016
Volyn region	...*	...*	...*
Zakarpattia region	28 804	...*	...*
Lviv region	187 207	152 018	123 229
<b>Subtotal in 7 regions</b>	261 322	210 186	167 057
<b>Total production in Ukraine</b>	1 074 331	839 834	1 077 507
<b>Share of 7 regions in Ukraine's production</b>	<b>24,3%</b>	<b>25,0%</b>	<b>15,5%</b>
<b>Wooden furniture of a kind used in the bedroom, in the dining room and in the living room</b>			
Chernivtsi region	27 403	22 558	23 393
Ivano-Frankivsk region	14 320	29 218	27 377
Ternopil region	...*	48 130	24 065
Rivne region	2 394	2 418	2 521
Volyn region	387 996	298 524	240 387
Zakarpattia region	73 341	121 012	144 998
Lviv region	302 320	352 859	405 296
<b>Subtotal in 7 regions</b>	807 774	874 719	868 037
<b>Total production in Ukraine</b>	1 393 632	1 494 335	1 450 999
<b>Share of 7 regions in Ukraine's production</b>	<b>58,0%</b>	<b>58,5%</b>	<b>59,8%</b>

\* 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.

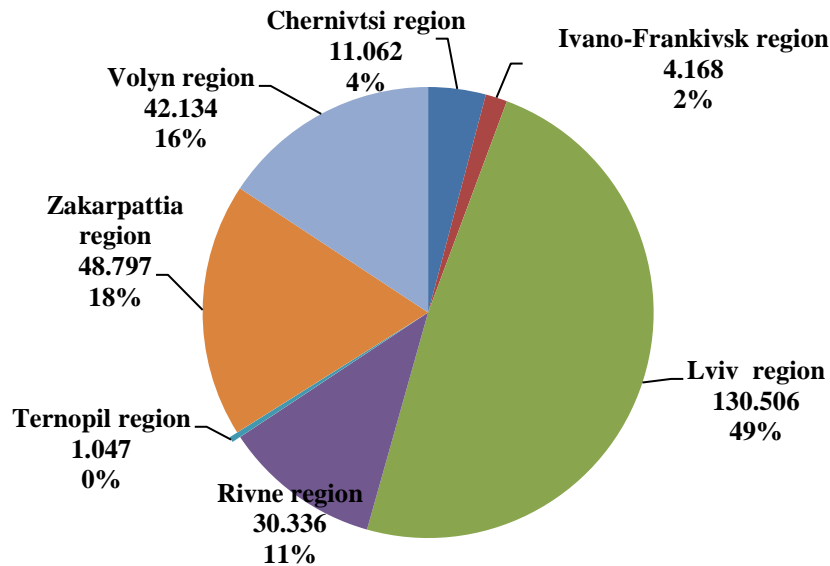
Sources: State Statistics Service of Ukraine

### Export

In 2016, the volume of furniture products exports in Western Ukrainian regions amounted to about USD 268 million, of which almost 49% was generated by Lviv region (USD 130.5 million) and 18% - by Zakarpattia region (USD 48.8 million).

**Table 3.40. The volume of furniture export in 2016, thousand USD**

Subsector	Chernivtsi region	Ivano-Frankivsk region	Lviv region	Rivne region	Ternopil region	Zakarpattia region	Volyn region	Total
Furniture; bedding, mattresses	11 062	4 168	130 506	30 336	1 047	48 797	42 134	268 050



**Fig. 3.67. Regional breakdown of furniture export, thousand USD**

#### Leading companies of the sector

The main furniture producers in the Western Ukrainian regions are "Modern-Expo" LLC, "Morgan Furniture " LLC and "Mebel-Service" LLC.

**Table 3.41. Leading furniture production companies**

ID code	Company name (English)	Company name (Ukrainian)	Revenues
21751578	Joint Ukrainian-Polish Company "Modern-Expo" LLC	Спільне Українсько-Польське Підприємство ТОВ "Модерн-Експо"	more than 100 mln. UAH
33426845	"Morgan Furniture " LLC	ТОВ "Морган Феніче"	more than 100 mln. UAH
25550470	"Mebel-Service" LLC	ТОВ "Мебель-Сервіс"	more than 100 mln. UAH
30088756	"Herbor-Holding" LLC	ТОВ "Гербор-Холдінг"	more than 100 mln. UAH
31976055	"BRV-Ukraine" LLC	ТОВ "БРВ-Україна"	more than 100 mln. UAH
33465109	Subsidiary ENTERPRISE "Ambient Furniture Ukraine"	ДП "Амбієнте Ферніче Україна"	more than 100 mln. UAH
22341285	"Busol" LLC	ТОВ "Бусол"	more than 100 mln. UAH
22071242	"Eno Furniture LTD" LLC	ТОВ "Ено Меблі ЛТД"	more than 100 mln. UAH
31247723	Subsidiary enterprise "Lamella"	ДП "Ламелла"	more than 100 mln. UAH
32051454	"Sokme" LLC	ТОВ "Сокме"	more than 100 mln. UAH

Regional distribution of the largest companies in the sector are shown in Table 3.42.

Table 3.42. Top-10 companies of furniture production by region

Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
Chernivtsi region	32726478	"Tokabo Furniture" LLC	ТОВ "Меблі "Токабо"	50-100 mln. UAH
	32722761	"Techno Plus" LLC	ТОВ "Техно Плюс"	50-100 mln. UAH
	14267296	Small Company "Skif"	МП "Скіф"	25-50 mln. UAH
	22853720	"Stroozhynets furniture combine" ALC	ТДВ "Сторожинецький меблевий комбінат"	less than 25 mln. UAH
	38682761	"BKM-Wood" LLC	ТОВ "БКМ-Вуд"	less than 25 mln. UAH
	37032457	"Mebli Styl Trading" LLC	ТОВ "Меблі Стиль Трейдинг"	less than 25 mln. UAH
	14272771	PrJSC "Impuls"	ПрАТ "Імпульс"	less than 25 mln. UAH
	37931334	"Restline Ukraine" LLC	ТОВ "Рестлайн Україна"	less than 25 mln. UAH
	274424	ALC "Chernivtsi furniture factory"	ТДВ "Чернівецька меблева фабрика"	less than 25 mln. UAH
	36749090	"Bukekspo" LLC	ТОВ "Букеспо"	less than 25 mln. UAH
Ivano-Frankivsk region	22176001	"Miro-Mark" LLC	ТОВ "Миро-Марк"	25-50 mln. UAH
	32076898	"Dubko" LLC	ТОВ "Дубко"	less than 25 mln. UAH
	13659261	"Skif" LLC	ТОВ "СКІФ"	less than 25 mln. UAH
	34084083	"Stelle-Ukraine LLC "	ТОВ "Штелле-Україна"	less than 25 mln. UAH
	37581477	"Comfort Mebli Plus" LLC	ТОВ "Комфорт Меблі Плюс"	less than 25 mln. UAH
	25071544	Subsidiary company "Promin Karpat"	ДП "Промінь-Карпати"	less than 25 mln. UAH
	22193608	Joint Enterprise "Porsa-Ukraine" LLC	ТОВ Спільне Підприємство "Порса-Україна"	less than 25 mln. UAH
	20019378	"Firm" Socrat-Swing " LLC	ТОВ "Фірма "Сократ-Свінг"	less than 25 mln. UAH
	37795331	PE "Profi-Service Plus"	ПП "Профі-Сервіс Плюс"	less than 25 mln. UAH
	32605440	"Maximus" LLC	ТОВ "Максимум"	less than 25 mln. UAH
Ternopil region	30344990	PE "Factory Furniture "Nova"	ПП "Фабрика Меблів "Нова"	25-50 mln. UAH
	36509185	"T-PS" LLC	ТОВ "Т-ПС"	less than 25 mln. UAH
	32015594	PE "Shyk"	ПП "Шик"	less than 25 mln. UAH
	14028982	"Ternopol furniture factory" LLC	ТОВ "Тернопільська меблева фабрика"	less than 25 mln. UAH
	31275829	"Factory" Vatin " LLC	ТОВ "Фабрика "Ватин"	less than 25 mln. UAH
	31276985	PE "Furniture factory "Nova-Press "	ПП "Фабрика меблів "Нова-Прес"	less than 25 mln. UAH
	37363496	PE "Furniture Factory" Elegant "	ПП "Меблева фабрика "Еlegant"	less than 25 mln. UAH
	35492181	PE "Firm Trend"	ПП "Фірма Тренд"	less than 25 mln. UAH
	14032050	PE "Lisma"	ПП "Лісма"	less than 25 mln. UAH
	14049627	"Ternopil art furniture factory" ALC	ТДВ "Тернопільська фабрика художніх меблів"	less than 25 mln. UAH
Lviv region	25550470	"Furniture-Service" LLC	ТОВ "Мебель-Сервіс"	more than 100 mln. UAH
	33465109	Subsidiary enterprise "Ambiente Fernice Ukraine"	Дочірнє підприємство "Амбієнте Ферніче Україна"	more than 100 mln. UAH
	22341285	"Busol" LLC	ТОВ "Бусол"	more than 100 mln. UAH
	32051454	"Sokme" LLC	ТОВ "Сокме"	more than 100 mln. UAH
	33963954	"VMV Holding" LLC	ТОВ "ВМВ Холдінг"	50-100 mln. UAH
	38172141	"Vudtekhnik" LLC	ТОВ "Вудтехнік"	50-100 mln. UAH
	36676494	"Embavud Ukraine" LLC	ТОВ "Ембавуд Україна"	50-100 mln. UAH
	39135210	"Furniture Factory "Stryi" LLC	ТОВ "Меблевий Комбінат "Стрий"	less than 50 mln. UAH
	32704124	"Sofas" LLC	ТОВ "Софас"	less than 50 mln. UAH

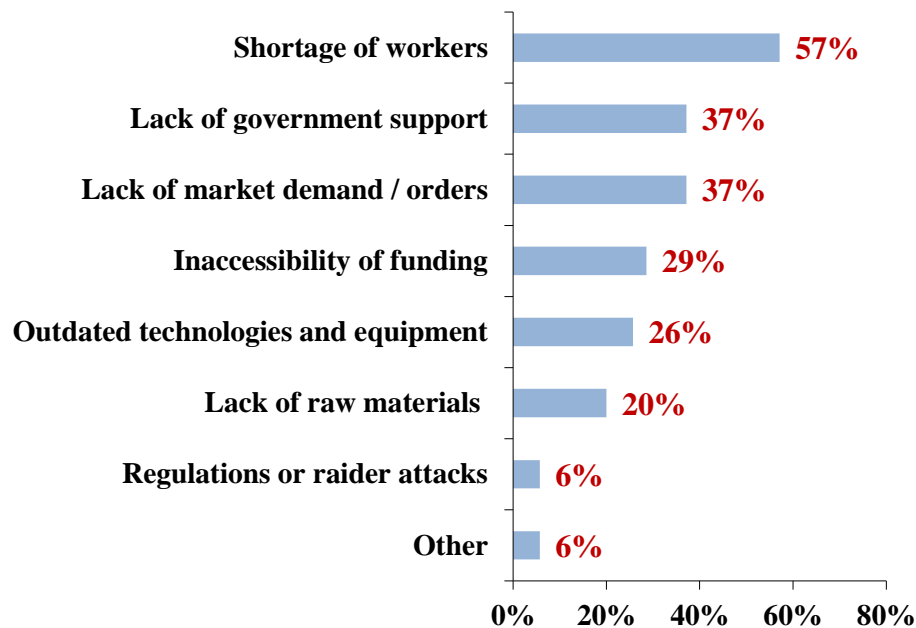
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Region	ID code	Company name (English)	Company name (Ukrainian)	Revenues
	23959024	"Media-West" LLC	ТОВ "Медіа-Вест"	less than 50 mln. UAH
Rivne region	33426845	"Morgan Furniture" LLC	ТОВ "Морган Феніче"	more than 100 mln. UAH
	13977624	Small Business - LLC "Olisma"	Мале Підприємство - Тов "Олісма"	more than 100 mln. UAH
	33634823	"Domino-Tekh" LLC	ТОВ "Доміон-Тех"	less than 50 mln. UAH
	39620549	PE "Furniture Club"	ПП "Мебельний Клуб"	less than 50 mln. UAH
	5516300	Commandary Company "Radivyliv Furniture Factory"	Командитне Товариство "Радивилівська Меблева Фабрика"	less than 50 mln. UAH
	3972749	Rovenskiy Training And Production Enterprise Of Ukrainian Commercial Department	Рівненське Навчально-Виробниче Підприємство Українського Товариства Глухих	less than 50 mln. UAH
	30352163	Small Collective Company Olvik-1 Of The Public Association " Ukrainian National Fund For The Help Of Chernobyl Invalids ".	Мале Колективне Підприємство "Олвік-1" Громадського Об'єднання "Український Національний Фонд Допомоги Інвалідам Чорнобиля	less than 50 mln. UAH
	32124726	"Furniture Factory" Volyn" LLC	ТОВ "Меблева Фабрика "Волинь"	less than 50 mln. UAH
	13974956	Firm "Gefest" LLC	ТОВ - Фірма "Гефест"	less than 50 mln. UAH
	13993563	Small Enterprise "Block" LLC	ТОВ Мале Підприємство "Блок"	less than 50 mln. UAH
Zakarpattia region	22071242	"Eno Furniture LTD" LLC	ТОВ "Ено Меблі ЛТД"	more than 100 mln. UAH
	31247723	Subsidiary enterprise "Lamella"	Дочірнє підприємство "Ламелла"	more than 100 mln. UAH
	33142018	"Industry Of Woodworking" LLC	ТОВ "Індустрія Деревообробки"	50-100 mln. UAH
	24576816	"Inter-Kashtan" LLC	ТОВ "Інтер-Каштан"	less than 50 mln. UAH
	38802014	"Elano" LLC	ТОВ "Елано"	less than 50 mln. UAH
	35718632	"Furniture Factory Touryanka" LLC	ТОВ "Меблева Фабрика Тур'янка"	less than 50 mln. UAH
	32617105	"TT Plus" LLC	ТОВ "ТТ Плюс"	less than 50 mln. UAH
	13586088	PE Production Company "Astra"	ПП Виробничо-Комерційна Фірма "Астра"	less than 50 mln. UAH
	32417782	"Mate-Ukraine" LLC	ТОВ "Мате-Україна"	less than 50 mln. UAH
	31098952	Production-Commercial Firm "Leda's-Ukraine"	Виробничо-Комерційна Фірма "Леда'с-Україна"	less than 50 mln. UAH
Volyn region	21751578	Joint Ukrainian-Polish Company "Modern-Expo" LLC	ТОВ Спільне українсько-польське підприємство "Модерн-Експо"	more than 100 mln. UAH
	30088756	"Herbour-Holding" LLC	ТОВ "Гербор-Холдінг"	more than 100 mln. UAH
	31976055	"BRV-Ukraine" LLC	ТОВ "БРВ-Україна"	more than 100 mln. UAH
	30089452	Enterprise With Foreign Investment LLC "NSC"	Підприємство з іноземними інвестиціями ТОВ "НЗК"	less than 50 mln. UAH
	13355868	"Interremo" LLC	ТОВ "Інтерремо"	less than 50 mln. UAH
	39827553	PE "Sunvud"	ПП "Санвуд"	less than 50 mln. UAH
	31102366	PE "Arnik"	ПП "Арнік"	less than 50 mln. UAH
	5384442	"Ukrtrans-Volyn" LLC	ТОВ "Укртранс-Волинь"	less than 50 mln. UAH
	39854681	PE "Grinforest"	ПП "Грінфорест"	less than 50 mln. UAH
	37602459	PE "Vaova"	ПП "Ваова"	less than 50 mln. UAH



**Key obstacles observed in the sector**

While identifying main obstacles for the development of furniture production in the Western Ukrainian regions 47 companies were contacted, of which 35 (74%) agreed to participate in the survey, and 12 (26%) refused. The following figure shows the rating of the obstacles as they perceived by enterprises.



**Fig. 3.68. The rating of main obstacles for the development of furniture industry in Western Ukrainian regions**

The Ukrainian furniture sector faces some important challenges. Interviewed companies stressed the following key obstacles to growth: shortage of workers (57%), lack of government support (37%) and lack of market demand (37%).

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.

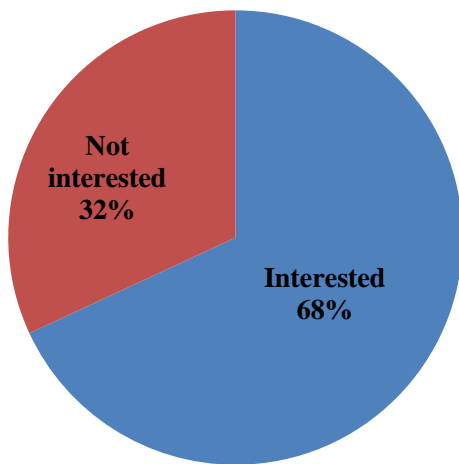
A considerable part of furniture enterprises requires modernization of equipment and improvement of quality of products, which requires affordable long-term financing, with a loan rate of <10% per annum for at least 3 years.

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.

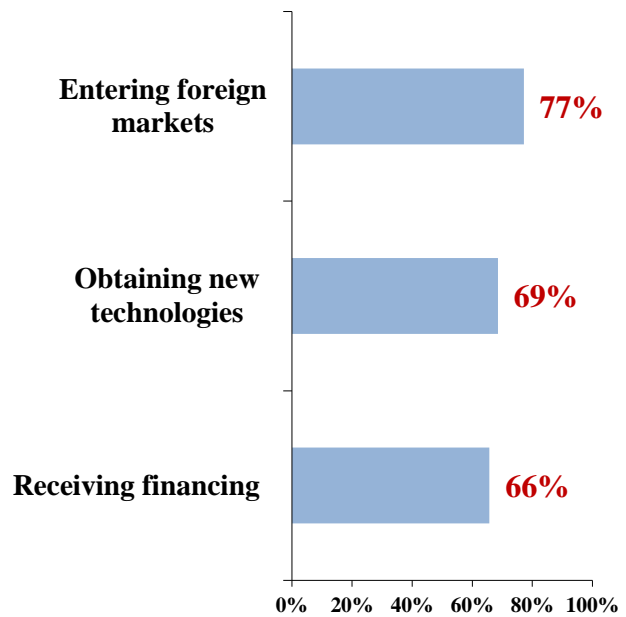


Manufacturers lack the domestic furniture accessories and high-quality wood panels that they are forced to import.

During the survey, a potential for cooperation with the Dutch business was studied. As a result, about 68% of the surveyed companies express interest in cooperation with the Dutch companies, first of all in entering foreign markets (77%), obtaining new technologies (69%) and receiving financing (66%).



**Fig. 3.69.** The interest of furniture industry enterprises in cooperation with the Dutch business



**Fig. 3.70.** Main areas of potential cooperation with the Dutch business in the furniture industry, %

### 3.8. Bioenergy (current and planned projects in bioenergy)

#### The structure of the biomass market in Ukraine

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

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.

Biodegrades 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.

**Table 3.43. Biomass Classification**

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

Table 3.44 provides an assessment of the technical energy potential of biomass in the studied regions. The technical potential is the fraction of theoretical potential that is available under the current technological and technical conditions (such as collection technology, infrastructure and availability, processing technologies).

**Table 3.44. Technical energy potential of agrarian and forest biomass, toe<sup>2</sup>**

Region	Agrarian biomass (leguminous crops, oilseeds and sunflower, vegetable corn waste)	Forest biomass	Total
Lviv	0,00	0,17	0,17
Zakarpattia	0,00	0,22	0,22
Ivano-Frankivsk	0,00	0,12	0,12
Ternopil	0,09	0,04	0,13
Chernivtsi	0,08	0,11	0,19
Volyn	0,04	0,09	0,13
Rivne	0,04	0,11	0,15
<b>Total</b>	<b>0,25</b>	<b>0,85</b>	<b>1,10</b>

Source: Bioenergy market in 9 regions of Ukraine (Volyn, Zhytomyr, Zakarpattia, Ivano-Frankivsk, Lviv, Rivne, Ternopil, Khmelnytsk, Chernivtsi). Centre of business support in Lviv, based upon PPV Knowledge Networks, p.8.

The value chain in the bioenergy market includes the following participants: raw material holders, raw material purchasers, biofuels manufacturers, biofuels traders, biomass heat producers and end-users. The enterprises from the chain are shown in the Table 3.45 below.

**Table 3.45. Value chain participants in the bioenergy market in 7 regions of Western Ukraine**

№	Company name (English)	Company name (Ukrainian)	Activity	Contacts
<b>Chernivtsi region</b>				
1	"Healthy Dream" LLC	ТОВ «Здоровий сон»	Manufacturer of wood pellets	biopellets.com.ua
2	Vizhnitsa biofuel company	Вижницька біопаливна компанія	Manufacturer of wood pellets	bio.ukrbio.com/ua/catalogue/1359/about
3	PJSC Chernivtsi Oil and Fat Factory	ПАТ Чернівецький олійно-жировий комбінат	Sunflower shrine	chmzhk.vioil.com
4	NVO Ekotech LLC	ТОВ НВО Екотех	Manufacturer of heat from biomass, manufacturer of pellets	nvo-ecotech.com.ua/
<b>Ivano-Frankivsk region</b>				
1	Grinenergy LLC	ТзОВ «Гріненерджі»	Power company	bio.ukrbio.com
2	PJSC "Serin-forest"	ПрАТ «Серін-ліс»	Woodworking, energy service	irisgroup.info

<sup>2</sup> Tonne of oil equivalent.

№	Company name (English)	Company name (Ukrainian)	Activity	Contacts
3	BEIZ LLC	BEIZ LLC	Producer of fuel pellets from straw	bio.ukrbio.com
4	Milwood LLC	ТОВ «Мілвуд»	Woodworking, producer of wood chips	https://millwood.com.ua
5	Bioenergo-Export LLC	ТОВ «Біоенерго-експорт»	Manufacturer of wood briquettes	bio.ukrbio.com/ua/catalogue/3553/about/
6	Biopal-IF LLC	ТОВ «Біопал-ІФ»	Manufacturer of wood pellets	bio.ukrbio.com/ua/catalogue/2412/about/
7	Dolyna wood processing plant	Долинський ДФЗ	Manufacturer of wood pellets	alt-energo.com
8	Alt-Energo LLC	ТОВ «Альт-Енерго»	Manufacturer of wood pellets	alt-energo.com
9	State Enterprise "Ivano-Frankivsk TeploComunenergo"	ДМП «Івано-Франківськтеплокомуненерго»	Producer of heat from biomass	tke.if.ua
10	GC "Infinity Energy Group"	ГК «Інфініті Енерджі Груп»	Development and implementation of bioenergy projects	infinity-energy-inc.com
<b>Ternopil region</b>				
1	ООО "Bioprom-Trans Ukraine"	ТОВ «Біопром-Транс Україна»	Manufacturer of pellets and briquettes	bioprom-trans.com/
2	LLC "Klinwood-Ternopil"	ТОВ «Клінвуд-Тернопіль»	Manufacturer of wood pellets, cake	cleanwood@ukr.net
3	PE "Bioreurservis"	ПП «Біоресурссервіс»	Manufacturer of wood pellets	boeursservs-pp.uaprom.net
4	Bio Technology Development LLC	ТОВ «Bio Technology Development»	Manufacturer of wood pellets	biotechnology.net.ua
5	LLC "Ukrspetsteplo"	ТОВ «Укрспецтепло»	The producer of heat from biomass	usteplo.com
<b>Lviv region</b>				
1	BioGumas LLC	ТЗОВ «БіоГумос»	Manufacturer of peat briquettes	torf.lviv.ua
2	LLC "Lopatinsky peat briquetting plant"	ТОВ «Лопатинський торфобрикетний завод»	Producer of fuel peat briquettes, fuel peat crumb	agrotender.com.ua
3	LLC "Stoyanivsky peat briquetting plant"	ТЗОВ «Стояннівський торфобрикетний завод»	Manufacturer of peat briquettes	stbz.torfdom.com/
4	PE "Oliyar"	ПП «Оліяр»	Sunflower husk production	oliyar.com.ua/
5	PP "Lviv-Pak"	ПП «Львів-Пак»	Woodworking, producer of wood pellets	lviv-pack.com.ua

№	Company name (English)	Company name (Ukrainian)	Activity	Contacts
6	FOP "Telyuk Yuriy Romanovich"	ФОП «Телюк Юрій Романович»	Manufacturer of wood chips	izexinc@gmail.com
7	LLC International Vudvorking Company	ТОВ «Інтернешнл вудворкінг компані»	Manufacturer of wood pellets	iwc@gmail.com
8	Eco Optima LLC	Еко Optima LLC	Producer of heat from biomass	ecooptima.com.ua
9	ООО ArboKarbo	ТОВ «АрбоКарбо»	Manufacturer of firewood	arbokarbo.ua
10	Eco Standart 10 LLC	ТОВ «Еко Стандарт 10»	Manufacturer of wood briquettes and pellets	eco-standart.com.ua/
11	UkrNII VVT named after L.Pogorilogo	УкрНДІ ПВТ імені Л.Погорілого	Power Plants	ndipvt.com.ua/
12	Bioproject LLC	ТОВ «Біопроект»	Power Plants	bioproject.com.ua
13	LLC "Sapsan"	ТОВ «Сапсан»	Woodworking, producer of wood pellets	paolorossi.ua
14	Garant Hot LLC	ТОВ «Гарант тепло»	Manufacturer of wood pellets	garant-teplo@meta.ua
15	PE "IRS" ("Inter-Round Service")	ПП «ІРС» («Інтер Раунд-Сервіс»)	Manufacturer of wood pellets	irs.derevo.ua/
16	Carbon Group LLC	ТОВ «Карбон-груп»	Manufacturer of wood pellets	komarechko@gmail.com
17	PJSC "Budkatital Ekologji" factory"	ПАТ «Будкапітал Екологі» фабрика»	Harvesting firewood, charcoal	drevo100.com.ua
18	Private Enterprise "Uragan"	Приватне підприємство Фірма "Ураган"	Manufacturer of wood pellets	uragan.com.ua
19	Subsidiary "Sorensen I Haar" of the Danish company "Concept Partners"	Дочірнє підприємство "Соренсен І Хаар" Датської Компанії "Концепт Партнерс"	Manufacturer of wood flour	sorensen-haar.business-guide.com.ua
20	Private enterprise "Nectar-Agro"	Приватне підприємство "Нектар-Агро"	Peat production	nektaragro-pp.biz-gid.ru
21	Private enterprise "Typhoon Plus"	Приватне підприємство "Тайфун-Плюс"	Manufacturer of wood briquettes and pellets	tayfun@ukr.net
22	"U.A.I.Service" LLC	ТОВ "У.А.І. Сервіс"	Manufacturer of wood pellets	(097)80979405947
23	Ecoenergyikrain LLC	ТОВ "Екоенерджіукраїн"	Manufacturer of wood pellets	bio.ukrbio.com/ua/catalogue/4217/about/
24	Vudpel LLC	ТОВ "Вудпел"	Manufacturer of wood pellets	8589pit@ukr.net

№	Company name (English)	Company name (Ukrainian)	Activity	Contacts
<b>Zakarpattia region</b>				
1	Scientific and production enterprise "Griffcand-Svalyava" LLC	ТОВ «НВП «Грифсканд-Свалява»	Producer of charcoal	gryfskand.pl/en/start
2	East-West Chemicals Asset Management Limited	East-West Chemicals Asset Management Limited	Producer of charcoal	stelmah_ri@poliprom.com
3	Crook Wood LLC	ТзОВ «Крок Вуд»	Woodworking, producer of charcoal, firewood	krokwood.com
4	Carrbridge Developments Limited	Carrbridge Developments Limited	Producer of charcoal	sales@lxx.com.ua
5	Euroland LLC	ТОВ «Євроленд»	Producer of charcoal	quality@lxx.com.ua
6	Greenwood 2005 LLC	ТОВ «Грінвуд 2005»	Manufacturer of wood chips	transvood@ukr.net
7	Biopel LLC	ТОВ «Біопел»	Manufacturer of wood chips	pavlo.popovych@biopel.org
8	LLC "SIO-K"	ТОВ «СІО-К»	Manufacturer of wood chips	siok.office@meta.ua
9	Holts LLC	Holts Ltd	Manufacturer of wood chips	m.maksimets@gmail.com
10	PE "SIO"	ПП «СІО»	Woodworking, producer of wood pellets	ppsio.com/ua/
11	LLC "Contact-5"	ТОВ «Контакт-5»	Woodworking, manufacturer of sawdust briquettes	kontakt-5.com.ua/
12	PE "Trier"	ЧП «Трієра»	Manufacturer of wood cake	chptriera@gmail.com
13	LLC "Intertorrs"	ТОВ «Інтерсорс»	Manufacturer of wood pellets	intersource.com.ua
14	Wright Power Energy Ukraine LLC	ТОВ «Райт Пауер Енерджи Україна»	Producer of heat from biomass	rightpower.ua/
15	LLC "Success"	ТОВ «Успіх»	Woodworking, producer of wood briquettes	uspih.uz.ua
<b>Volyn region</b>				
1	Volyn-Calvis LLC	ТОВ «Волинь-Кальвіс»	Production and trade of pellets and solid fuel boilers	volyn-kalvis.com.ua
2	Grow Plus Plus LLC	ТзОВ «Приріст Плюс»	Producer of charcoal	pryrist-plus.com.ua
3	Open Company "Verba-VV"	ТОВ «Вєрба-ВВ»	Producer of charcoal	kovelverba@gmail.com

№	Company name (English)	Company name (Ukrainian)	Activity	Contacts
4	Evrovud Ukraine LLC	ТОВ «Євровуд Україна»	Manufacturer of wood pellets	urowood.office manager@gmail.com
5	LLC "LBK WOOD"	ТОВ «ЛБК ВУД»	Manufacturer of wood pellets	lbkwood.com.ua/
6	Volynteplo LLC	ТОВ «Волиньтепло»	Manufacturer of wood pellets	tov-volinteplo.oferteo.com.ua/
7	Salix Energy LLC	ТОВ «Salix Energy»	Energy crop	salix-energy.com
8	Izolfа Ukraine LLC	ТОВ «Ізола Україна»	Woodworking, producer of wood pellets	izolfа.com.ua/
9	Tsunami LLC	ТОВ «Цунамі»	Woodworking, manufacturer of pellets	zunami.com.ua
10	Communal enterprise "LutskTeplo"	КП «Луцьктепло»	Energy service company	teplo-dkp.lutsk.ua
11	Brenwell LLC	ТОВ «Бренвель»	Manufacturer of wood chips	balaser@ukr.net
12	Avanty Development LLC	ТОВ «Аванті Девелопмент»	Producer of heat from biomass	avanti.org.ua/
<b>Rivne region</b>				
1	Sarnitorf LLC	ТОВ «Сарніторф»	Extraction, sale and processing of peat	sarnitorf.com.ua
2	LLC "MAR-SOF"	ТОВ «МАР-СОФ»	Producer of charcoal	lavruk_serg@ukr.net
3	Carbonis LLC	ТОВ «Карбоніс»	Producer of charcoal	carbonis.eu
4	PE "Design"	ПП «Дизайн»	Woodworking, producer of wood chips	wood-design.com.ua/
5	LLC "Ukrainian Sawmills"	ТЗОВ «Українські лісопильні»	Woodworking, producer of wood chips	serhiy.stupnitskiy@sp1.rv.ua
6	LLC "Odek Ukraine"	ТОВ «Одек Україна»	Woodworking, producer of wood chips	odek.eu
7	Firma Nostradamus LLC	ТОВ «Фірма Нострадамус»	Woodworking, producer of wood chips	nostradamus-fsc.com.ua/
8	Biosystem LLC	ТОВ «Біосистема»	Manufacturer of wood pellets	biosistema.uaprom.net
9	PE Torfwood	ПП «Торфвуд»	Manufacturer of wood cake	torfwood.com
10	Polissya region LLC	ТОВ «Поліський регіон»	Manufacturer of peat substrates	richland.net.ua
11	LLC "MSM Favorit"	ТОВ «МСМ Фаворит»	Manufacturer of wood pellets	bio.ukrbio.com/ru/catalogue/3534/about/
12	LLC "Group Trade"	LLC «Group Trade»	Manufacturer of wood pellets	markgrouptrade.com
13	LLC "Modern Energy"	ТОВ «Сучасні енергетичні»	Manufacturer of peat briquettes	suchasn-energetichn-sistemi.uaprom.net

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.

### **Solid biofuel production**

#### ***Pellets and briquettes***

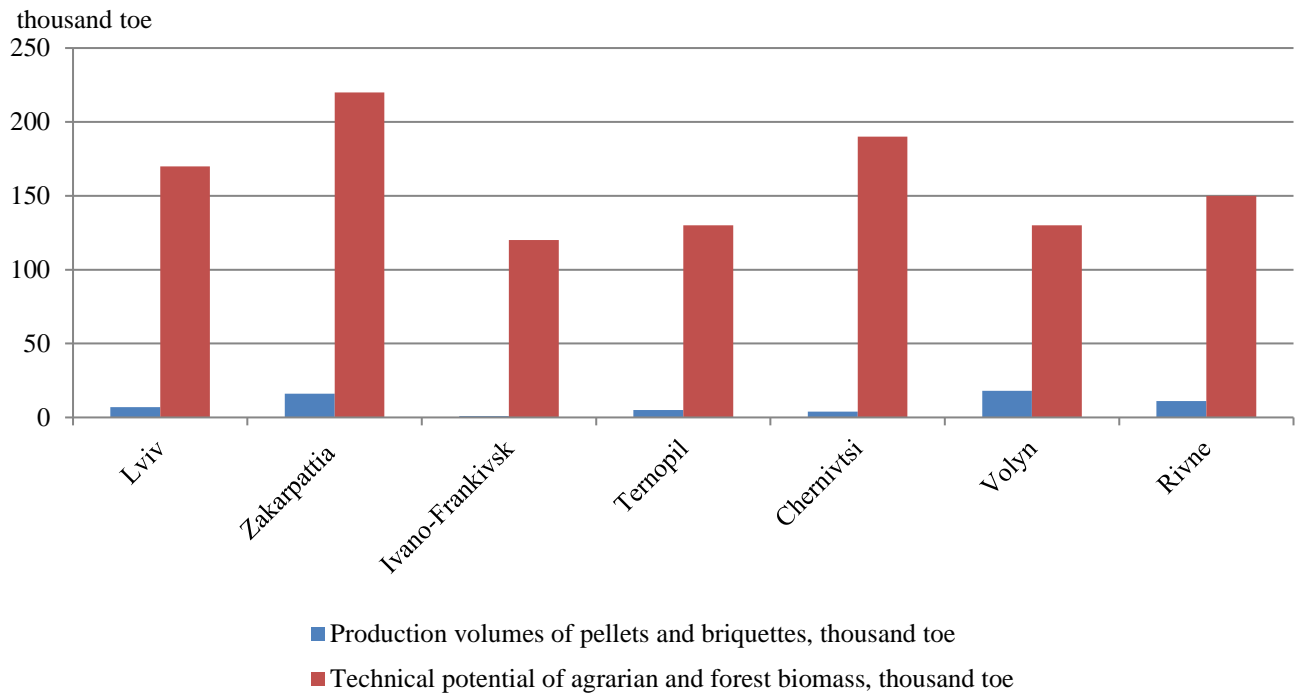
There are at least 57 pellet and briquetting plants with a total production capacity of more than 100 thousand tons per year (39.4 thousand toe) at the territory under study. Most of the factories are located in Rivne region (18 units). In other regions, there are up to 10 producers registered (Table 3.46).

**Table 3.46. Number of producers of pellets and briquettes and production volumes**

Region	Number of producers of pellets and briquettes, units	Production volume of pellets and briquettes in 2016	
		Thousand tonnes	Thousand toe
Lviv	7	12	7
Zakarpattia	10	27	16
Ivano-Frankivsk	4	2	1
Ternopil	4	9	5
Chernivtsi	5	7	4
Volyn	9	32	18
Rivne	18	19	11
<b>Total</b>	<b>57</b>	<b>108</b>	<b>61</b>

Currently, pellet and briquettes producers utilize about 5.5% of the technical potential of agrarian and forest biomass in the region.





**Figure 3.71. Production volumes of pellets and briquettes and technical potential of biomass in 7 regions of Western Ukraine**

Volyn (32 thousand tons / year) and Zakarpattia (27 thousand tons / year) regions are leaders in production volumes. All export-oriented companies have an average production capacity of 5.2 thousand tons per year, compared to 1.6 thousand tons per year for factories oriented to the domestic market. Export of pellets is approximately 0.03 million tons per year.

About 95% of the products are made from wood raw materials. It is mainly wood processing waste.

### ***Energy crop***

There are at least 5 companies in the region that grow energy crop and produce wood chips from them. The total area of plantations is more than 2,400 hectares, which yields 49 thousand tons per year (11.54 thousand toe). The largest player in this segment is the Salix Energy company. The company grows energy willow at 1.700 hectares and controls 68% of the market.

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.

**Table 3.47. Companies that grow energy plants**

<b>№</b>	<b>Company</b>	<b>Region</b>	<b>Plant</b>	<b>Area, ga</b>	<b>Harvest, tons per year</b>	<b>Thousand toe</b>
1	Salix Energy	Volyn	Willow	1 700	34 000	7,96
2	Energo Agrar	Rivne	Miskanthus	630	12 600	2,95
3	Ukr Research Institute of HVT named after L.Pogorilyi	Lviv	Willow	50	1 000	0,23
4	Bioproject LLC	Lviv	Willow	50	1 000	0,23
5	Institute of Agriculture of Western Polissya	Rivne	Willow	36	720	0,17
	<b>Total</b>			<b>2 466</b>	<b>49 320</b>	<b>11,54</b>

***Forest waste***

The technically achievable potential of forest biomass (taking into account the planned felling) is 0.85 million toe. Part of this resource is consumed as a fuel by the households and enterprises in boilers, in manufacturing, and in power industry. There are 229 companies involved in supplying biofuels to consumers in the region. This figure is significantly higher compared to other regions of Ukraine. The number of biofuel boiler-houses is constantly increasing.

**Table 3.48. Number of suppliers of forest biomass by region**

<b>Region</b>	<b>Number of forest enterprises</b>
Lviv	45
Zakarpattia	28
Ivano-Frankivsk	21
Ternopil	21
Chernivtsi	26
Volyn	39
Rivne	49
<b>Total</b>	<b>229</b>

**Bioethanol production**

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.

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 "Ukrspirt", located on 8 distilleries in 7 regions of Ukraine.

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.

An introduction of an excise tax on alternative motor fuels in 2014 led to a sharp decrease in the production of liquid biofuels in Ukraine (Table 3.49).

**Table 3.49. Domestic production and foreign trade of liquid biofuels in Ukraine in 2013-2016, thousand tons**

	2013	2014	2015	2016
Production	66	26	16	6
Export	-	-	9	6
Import	-	38	46	58
Domestic consumption	66	64	53	58

Source: State Statistic Service, "Annual Energy Balance of Ukraine (by product)"

Currently, bioethanol buyers – refineries and biofuel producers issue tax bills for excise duty.

The tax bill which can be issued for up to 90 days is deemed to be repaid in case of a documentary confirmation of the bioethanol use to produce biofuels.

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. It implies increase in domestic demand for biofuel to more than 0.5 million tons per year.

In the studied regions, there are two active bioethanol producers – Khorostkiv distillery of the state-owned enterprise "Ukrspirt" in the town of Khorostkiv, Gusyatsky District, Ternopil Region and private Biofuel Energy Company in the city of Lutsk, Volyn region. The enterprises produce brand "B" bioethanol with a volume fraction of ethyl alcohol at least 98.3%. The product is obtained from vegetable sugar and starchy raw materials. The capacities of Khorostkiv distillery and Biofuel Energy Company are 15.8 thousand tons / year and 17.5 thousand tons / year respectively.

According to the Ukrspirt's Strategic Plan for the Alcohol Industry Development announced in February 2018, Ukrspirt is to develop biofuel manufacturing from bioethanol, biodiesel and biogas at 21 distilleries in Lviv (10) and Ternopil (11) regions.

In addition, in 2017 the American-Hungarian Consortium "Interservis-Group" announced the start of the construction of a bioethanol plant near town of Chop, Zakarpattia region, with a capacity of 60 thousand tons per year.

### **Biofuel consumption**

#### ***Energy service companies and utilities***

In general, there are at least 140 energy service companies and utilities that use biomass in the studied regions. The total capacity of their installations is more than 488 MW. The leaders in terms of installed capacity are Volyn (159 MW) and Rivne (109 MW) regions.

Let us assume the efficiency of the installations is 85%, the heating season lasts 175 days, and the utilization rate of the installed capacity is 70%. In this case, the estimated annual fuel demand for these plants is about 145 thousand toe. (Table 3.50).

**Table 3.50. Capacity of utility companies and volume of consumption**

<b>Region</b>	<b>Capacity, MW</b>	<b>Consumption, thousand toe</b>
Lviv	58	17
Zakarpattia	13	4
Ivano-Frankivsk	79	23
Ternopil	58	17
Chernivtsi	12	4
Volyn region	159	47
Rivne	109	32
<b>Total</b>	<b>488</b>	<b>145</b>

#### ***Power stations***

There are 3 power plants – biogas plants in the studied regions. Raw material for them is agricultural waste and household waste. Wood biomass for power generation is not used.

**Table 3.51. Biogas plants**

<b>№</b>	<b>Company (in English)</b>	<b>Company (in Ukrainian)</b>	<b>Region</b>	<b>Source of energy</b>	<b>Capacity, MW</b>
1	Danosha LLC	ТОВ «Даноша»	Ivano-Frankivsk	Pig manure	1,17
2	Claire Energy LLC	ТОВ «Кліар Енерджі»	Ivano-Frankivsk	Household waste	0,66

№	Company (in English)	Company (in Ukrainian)	Region	Source of energy	Capacity, MW
3	PE "MPP" Latex "	ПІП «МІПІ «Латекс»	Zakarpattia	Silage waste	0,60
	<b>Total</b>				<b>2,43</b>

### Market development trends

According to the Energy Balance of Ukraine of 2015, the final consumption of natural gas by enterprises in the studied regions, excluding municipal utilities of heat supply and power plants, is 2.4 million toe. At the same time, about 85% of natural gas is consumed by the population.

**Table 3.52. Final consumption of natural gas in 2015**

Region	Thousand toe
Volyn	203
Zakarpattia	308
Ivano-Frankivsk	356
Lviv	825
Rivne	206
Ternopil	303
Chernivtsi	196
<b>Total</b>	<b>2 398</b>

The annual technically achievable potential of forest and agrarian biomass in the region is 1.1 million tons. The consumption of biomass in the heat supply sector is about 0.15 million tons per year. The estimated annual consumption of biomass by the households is approximately 2.5 times higher and is 0.38 million tons. Export of pellets is 0.03 million tons per year (60% of production).

Consequently, there is a certain resource for the sector development, which will continue to develop in the first place to replace the most expensive natural gas (commercial companies and households). As the forest biomass resources are exhausted and biofuels become more expensive, the energy cropping sector and agricultural biomass processing will grow.

### 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.

Potential investment projects

Below is a list of investment projects in the field of bioenergy in the studied regions that came to the Office of Renewable Energy Investment in the State Energy Efficiency of Ukraine as of May 2018<sup>3</sup>.

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<sup>3</sup> Source: Official website of the State Agency for Energy Efficiency and Energy Saving of Ukraine  
<http://sae.gov.ua/uk/business/investyscii>

**Table 3.53. List of investment projects in the field of bioenergy**

<b>№</b>	<b>Region</b>	<b>Investment project/proposal, the initiator of the project</b>	<b>Activity</b>	<b>Capacity MW</b>
1	Volyn	Construction of mini heat power plant (cogeneration unit) electric power 5.1 MW, city of Kovel, Kolbe Power Kovel LLC	Bioenergy	5.1
2	Lviv	CHERVOONOGRAD biomass electric power plant. Location – city of Chervonograd (Lviv Oblast). The initiator of the project is Salix Energy LLC. Feasibility study and business plan	Bioenergy	5.3
3	Lviv	Safe recycling of organic waste from livestock and crop production. Production of biogas in the Kamyanka-Buzky district of Lviv region	Bioenergy	
4	Lviv	Construction of an ecologically clean waste processing plant on the territory of the operating solid waste landfill in village of Stryi, Lviv region	Bioenergy/waste management	
5	Rivne	Construction of the garbage processing plant using the pyrolysis process (cogeneration). Town of Varash (Kuznetsovsk), Rivne region	Waste management/ Ecological safety	
6	Chernivtsi	Reconstruction of boiler-houses, Chernivtsi on the Zalozetsky-S.Schedrin streets with the installation of a bio boiler on pellets	Heat supply	
7	Ivano-Frankivsk	Construction of an ecologically clean waste processing plant in the area of the existing solid waste landfill in the Rybnoye region of Ivano-Frankivsk region	Bioenergy/waste management	

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](mailto:dilovod.agentstvo@gmail.com)

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

In Western Ukrainian regions there are 62 producers of equipment and components for agro-sectors and bioenergy energy production, namely 1 producer of greenhouse lighting, 3 producers of pesticides, 26 boiler producers, 9 fertilizer producers, 2 producers of refrigeration and freezing equipment, 16 producers of agricultural machinery, 1 dairy machinery producer, 2 agricultural products dryers producers and 2 producer of equipment for the production of wine, cider, fruit juices and similar beverages.

At the same time, the indicated producers are small in production volume, and therefore their market share is insignificant.

**Table 3.54. Producers of machinery, equipment, materials for agro-food, horticulture and bioenergy sectors**

Product	ID code	Company name (English)	Company name (Ukrainian)	Region
Lighting for greenhouses	32578132	Project-Production Firm Elektrosvit LLC	ТОВ "Проектно-Виробнича Фірма Електросвіт"	Ternopil region
Pesticides	22199462	Private Enterprise "Scientific-Production Firm" Stim "	ПП "Науково-Виробнича Фірма "Стім"	Ivano-Frankivsk region
	39849708	LLC "Ninti"	ТОВ "Нінті"	Ternopil region
	32451362	ТОВ - Фірма "Агрохімпак "	Firm "Agrohimpac LLC"	Rivne region
Central heating boilers, for producing hot water or low pressure steam	2971794	"Astron" ALC	ТДВ "Астрон"	Ternopil region
	7552205	State Enterprise "Ivano-Frankivsk Boiler-Welding Plant"	ДП "Івано-Франківський котельно-зварювальний завод"	Ivano-Frankivsk region
	21131678	"Alfa-Gazpromcomplex" Gas Equipment Plant "	ТОВ "Завод Газового Обладнання "Альфа-Газпромкомплект"	Ternopil region
	37556645	"Artem" LLC	ТОВ "Армот"	Ternopil region
	1284761	"Lviv Experimental Mechanical Factory" ALC	ТДВ "Львівський експериментальний механічний завод"	Lviv region
	4937815	Metallist LLC	ТОВ "Металіст"	Lviv region
	5723430	"Mukachivskiy Verstatovod" ALC	ТДВ "Мукачівський Верстатозавод"	Zakarpattia region
	5797977	OJSC "Osnastka"	ВАТ "Оснастка"	Volyn region
	14314972	PJSC "Rivne Factory" Gazotron"	ПАТ "Рівненський Завод "Газотрон"	Rivne region
	22576509	PE - Firm "Retra"	ПП - Фірма "Ретра"	Rivne region



Product	ID code	Company name (English)	Company name (Ukrainian)	Region
	23951910	Collective Enterprise "Yasen"	КП "Ясень"	Lviv region
	24175498	PJSC "Agroresurs"	ПрАТ "Агроресурс"	Rivne region
	25315667	"Gazotron-Vlatava" LLC	ТОВ "Газотрон-Влатава"	Rivne region
	30104493	"Factory" Konvektor" LLC	ТОВ "Завод "Конвектор"	Zakarpattia region
	30823440	"Technolis-Industry" LLC	ТОВ "Техноліс-Індустрія"	Lviv region
	31145221	"Bogdan and Volodymyr" LLC	ТОВ "Богдан І Володимир"	Lviv region
	32200047	PJSC "Factory" Techno-Drive"	ПАТ "Завод "Технопривод"	Rivne region
	33001289	PE - Firm "Company Kvartal"	ПП - Фірма "Компанія Квартал"	Rivne region
	33928354	ООО Romteh	ТОВ "Ромтех"	Lviv region
	34214554	Volyn-Kalvis Ltd.	ТОВ "Волинь-Кальвіс"	Volyn region
	36565365	PE "Retra-3M"	ПП "Ретра-3М"	Rivne region
	36597879	Bepaz Energo LLC	ТОВ "Бепаз Енерго"	Rivne region
	36767078	ООО "Ekokotel"	ТОВ "Екокотел"	Lviv region
	37556645	LLC Armot	ТОВ "Армот"	Ternopil region
	39231710	PE "Rivnespetsmash"	ПП "Рівнеспецмаш"	Rivne region
	39355047	Tekhnoprivod LLC	ТОВ "Технопривод"	Rivne region
Fertilizers	05607824	PJSC "Rivneazot"	ПАТ "Рівнеазот"	
	37685405	Mineral Group LLC	ТОВ "Мінерал-Груп"	Rivne region
	36809662	Ltd "Rich Land"	ТОВ "Річ Ленд"	Rivne region
	30526844	Agrofirm "Records" Ltd.	ТОВ "Агрофірма "Рекорд"	Rivne region
	21088370	Private Firm "Termite"	Приватна Фірма "Терміт"	Rivne region
	37382173	"Grybna Rodyna" LLC	ТОВ "Грибна Родина"	Rivne region
	38247819	Private Enterprise "Tykva"	ПП "Тиква"	Rivne region
	31121682	PE "Zeletin"	ПП "Зелемін"	Lviv region
	36933042	Private Enterprise "Research and Production Complex" BIOZ - Volyn "	Приватне Підприємство " Дослідно - Виробничий Комплекс " БІОЗ - Волинь "	Volyn region
Refrigeration and freezing equipment	33804075	"Bukremprom" LLC	ТОВ "Букремпром"	Chernivtsi region
	20813509	"Kadans" LLC	ТОВ "Каданс"	Lviv region
Agricultural machinery (parts of soil machiner, seeders and mowers)	217024	PJSC "Techinmash"	ПАТ "Техінмаш"	Ternopil region
	238180	OJSC "Kolomyia Plant of Agricultural Machinery"	ВАТ "Коломийський завод сільськогосподарських машин"	Ivano-Frankivsk region
	3767512	"Chernivtsyagrotehservis"	ТДВ	Chernivtsi

Product	ID code	Company name (English)	Company name (Ukrainian)	Region
		ALC	"Чернівціагротехсервіс"	region
	36467711	"Ternopil Machine-Building Plant" LLC	ТОВ "Тернопільський машинобудівний завод"	Ternopil region
	4655	OJSC Plant "Lvivsilmash"	ВАТ Завод "Львівсільмаш"	Lviv region
	222278	"Lviv factory of milling machines" ALC	ТДВ "Львівський завод фрезерних верстатів"	Lviv region
	237593	"Lvivagromashproekt" ALC	ТДВ "Львівагромашпроект"	Lviv region
	728380	PJSC "Rivnesilmash"	ПАТ "Рівнесільмаш"	Rivne region
	5795783	PJSC "Module M"	ПАТ "Модуль М"	Zakarpattia region
	13979385	PE "Patar"	ПП "Патар"	Rivne region
	23961825	"Leader-Techno Trade" LLC	ТОВ "Лідер-Технотрейд"	Lviv region
	31144694	Private Enterprise "Likos"	ПП "Лікос"	Lviv region
	31338967	"Transekosakhid" LLC	ТОВ "Трансекозахід"	Lviv region
	31533318	"Manufacturing Company" Kovelsilmash " LLC	ТОВ "Виробниче Об'єднання "Ковельсільмаш"	Volyn region
	32872065	PE "Volynagrotekh"	ПП "Волиньагротех"	Volyn region
	37204601	"West-Agroservice Plus" LLC	ТОВ "Захід-Агросервіс Плюс"	Volyn region
Dairy machinery	23592532	Private Small Enterprise Saur	ПМП "Саур"	Ternopil region
Dryers for agricultural products	14313501	PJSC "Inductor"	ПАТ "Індуктор"	Ivano-Frankivsk region
Dryers for agricultural products, biofuel boilers	38555008	"Bioenergy Company" YUTG" LLC	ТОВ "Біоенергетична Компанія "ЮТГ"	Ivano-Frankivsk region
Parts for presses, crushers and similar machines for the production of wine, cider, fruit juices and similar beverages	04605958	PJSC "Rivne Research Institute of Mechanical Engineering"	ПАТ "Рівненський науково-дослідний інститут технології машинобудування"	Rivne region
	20784529	"Vuzlivchanka" LLC	Тов "Вузлівчанка"	Lviv region