УДК 338.45:(66+677+338.43+630*83):005.336-047.44(477)
JEL Classification: L16, O25, O57 **Doi: 10.31767/su.4(91)2020.04.03**

S. O. Ishchuk,
DSc in Economics, Professor,
Head of the Department,
E-mail: iso.ird@ukr.net
ResearcherID: G-6417-2019,
ORCID: https://orcid.org/0000-0002-3698-9039;
L. Yo. Sozanskyy,
PhD in Economics,
Senior Researcher,
E-mail: ls.ird2@ukr.net
ResearcherID: G-5930-2019,
ORCID: https://orcid.org/0000-0001-7854-3310;
SI "Institute of Regional Research named after M. I. Dolishniy of the NAS of Ukraine"

An Assessment of the Development Potential of Manufacturing Industries in Ukraine

To ensure the competitiveness in world markets in the context of deepening globalization processes, Ukraine needs to adjust its own raw material base, which will qualitatively change the structure of Ukrainian exports from raw materials to goods with a high share of value added. The purpose of the article is to assess the development potential of chemical, textile, agro-processing and woodworking industries of Ukraine on the basis of import substitution and export orientation, and to substantiate organizational and economic forms of its practical implementation.

The authors propose an interpretation of the term "industrial system development potential". The peculiarities of operation of the manufacturing industry in Ukraine are determined on the basis of a comparative assessment of the density of cross-sectoral links, the cost and innovation level of domestic and European chemical, textile, woodworking and agro-processing industries. Based on the results of the analysis of the technological profile, the level of capacity utilization and performance indicators of the largest chemical enterprises of Ukraine, the strategic guidelines for the development of promising chemical industries are substantiated and organizational and economic forms of realizing their potential are proposed, in particular in the Western region.

Proposals for ensuring competitive conditions for participants in the domestic market of light industry products are provided, the need for simplified regulatory procedures and investment incentives to ensure the development of domestic light industry enterprises is substantiated. An organizational mechanism for restoring the raw material base of textile and other industries is developed. The regions of Ukraine are grouped according to the potential of timber harvesting and industrial processing. The perspective directions for the woodworking industry development in the administrative-territorial units of the Western region are defined (by production type), and the basic strategies of their realization, focused on the internal and external markets, are outlined. A comprehensive review of operation problems of agro-processing productions in Ukraine is made through the prism of their resourcing from a regional perspective. The key problems are outlined and the prospects for the development of grain, meat and milk productions are substantiated, based on current and forecasted trends in the respective commodity markets. Organizational forms for realization of the development potential of agro-processing productions in Ukraine and mechanisms for their institutional support are proposed.

Key words: *industry, processing production, potential, forms of potential's implementation, development, perspective directions.*

Introduction. To ensure the competitiveness in world markets in the context of deepening globalization processes, Ukraine needs to adjust its own raw material base. This will radically change the structure of Ukrainian exports from raw materials to goods with a high share of value added. Only imports of innovations (in form of production or management technologies), but not raw materials (mainly crops, ores or metals), can help increase future exports of value added along with filling the domestic market with high quality products. It follows that practical implementation of the development potential of domestic manufacturing industries will be capable

to accelerate integration of the domestic industrial sector in global value added chains, thus promoting technology transfer, spread of business culture, higher employment, increase in the professional and education qualification of production and management personnel, resulting in the higher level of salaries and living standards in Ukraine.

Literature review. The formation of the economic category "industry potential" is based on the resource theory, a founder of which was E. Penrose [1], and on the concept of resource dependence by J. Pfeffer [2], which assumes that the business operation efficiency depends on the level of resource utilization and exploitation. According to P. Grant, resources are a source of opportunities, whereas opportunities are a source of competitive advantages [3, p. 119]. Theoretical foundations of the resource-based approach were further developed in the concept of dynamic opportunities by D. J. Teece [4, p. 510], who interpreted the latter as the capacities of business entities to create, consolidate and integrate internal and external advantages in order to adapt to the changeable environment. G. Hamel and K. Prahalad proved that the unique combination of key advantages can create a competitive advantage for a company [5, p. 222]. Eventually, research in this field led to the development of the resource theory of competitive advantages (which is shown e. g. in works of J. Barney) [6]. This theory says that the availability and accessibility of resources complying with certain characteristic forms the highest potential of the society and allows it to implement the strategies focused on higher efficiency of the operation. Th. Durand puts emphasis on utilization of company resources for creating new potential opportunities due to process management (or re-engineering) [7]. He argues that the availability of a resource combination is not sufficient for the formation of industrial potential, as it is necessary to find technologies (mechanism) for their organization and effective exploitation. At the same time, the involvement of resources is limited to the available (or accessible) capital, conditions of the environment, operative goals of a business entity (i. e. the management situation). Therefore, breakdown of factors into external and internal ones is the essential one for understanding the processes of formation and development of the industrial potential.

The economic potential of industry as a system has to contain a set of the already established links and relations reflecting the past and the present of the process of company operation and development (the actual level of the resource potential), as well as an in-depth differentiated analysis of strategic links and relations with a long-term projection of opportunities and resources given their optimal exploitation (the perspective level of the potential). It should be noted that investigation of the category "industry development potential" is not a new problem, being addressed when elaborating a development strategy for the industrial sector of the economy. But a clear definition of the development potential is not existent, it tends to be interpreted as a set of opportunities of functional potentials to change the operation parameters in the conditions of a chosen development strategy. Some researchers highlight only the significance of its use and the factors with impact on its level.

The purpose of the article is to assess the development potential of chemical, textile, agro-processing and woodworking industries of Ukraine on the basis of import substitution and export orientation, and to substantiate organizational and economic forms of its practical implementation.

Results. A review of existing approaches to the definition of "development potential" gives grounds for elaborating the following broad definition: a set of limited resources and competences available with a company, to achieve global and strategic goals in future with due consideration to the conditions of external environment. We, therefore, believe that the industry development potential (manufacturing industry in particular) is a system of the internal economic potential, i. e. the potential of companies (or integrated industrial entities), which covers the potentials of production, resources (staff, financial, information etc.), investment, innovation and exports, on the one hand. On the other hand, it is a complex of external global and macroeconomic parameters (the phases of global economy development, the external and internal market conjuncture, fiscal and custom policies of the government etc.), which can either stimulate or limit the development of manufacturing companies [8, p. 6]. It follows that the development potential of an industrial system (or manufacturing industry or its segments) is the capability for effective operation and intensive increase of production output and exports given the available economic potential of companies, their resource supply, the capacity of internal and external markets, and the conditions of institutional and legal environment at macro- and meso-level.

A central problem for the Ukrainian economy is its heavy dependence on imports of industrial products, amounting to more than 80% in the total domestic imports. The share of imports in the internal consumption of the domestic chemical industry exceeds 50%, for the light industry it is 48%, for the food industry is makes nearly 32% (Table 1, constructed by data from [9; 10; 11]). The import component of the Ukrainian exports is similarly high: from nearly 40% in the food industry output to 57% in the chemical industry output. Import dependent are production processes in the manufacturing, especially in chemicals and textiles, with the share of imports in production costs close to 50%. In Poland, however, the figure is 1.5 times lower.

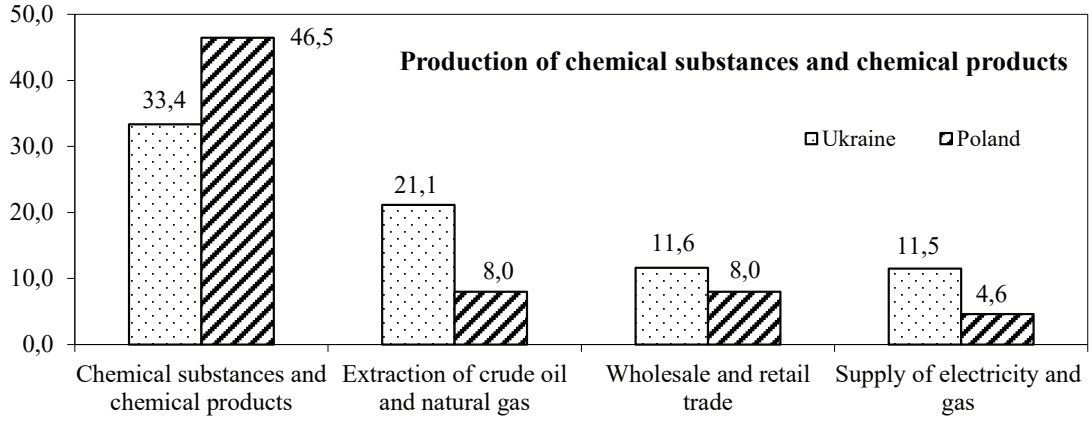
Table 1

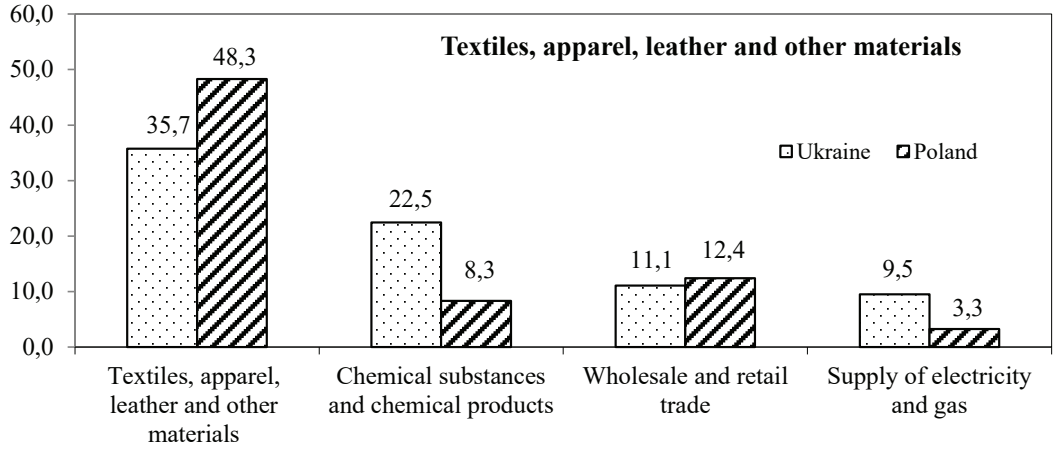
Import dependence of production processes in manufacturing, Ukraine and Poland

(%)

Production processes in manufacturing	Import share in the intermediate consumption of production processes in the manufacturing						Import share in the manufacturing exports		Import share in the manufacturing costs	
	Internal		Intermediate		Final					
	Ukraine	Poland	Ukraine	Poland	Ukraine	Poland	Ukraine	Poland	Ukraine	Poland
Chemical substances and chemical products	50.3	42.1	81.1	69.6	73.5	67.6	57.0	40.8	49.2	30.2
Textiles, apparel, leather and other materials	48.6	48.3	53.0	66.9	81.8	79.7	66.8	34.6	47.6	30.7
Foods, beverages, tobacco	31.9	19.0	40.9	21.1	20.9	20.8	39.4	27.0	23.0	15.6
Wood, paper; printing and replication	37.2	22.5	34.6	28.3	48.5	15.1	47.0	31.9	34.4	21.8

Another important problem for manufacturing processes in Ukraine is their high production costs, compared to Poland in particular, and much higher ones than in Germany (Figure 1, constructed by data from [9; 10; 11]). An essentially smaller share of intermediate consumption in the output of domestic light industry companies can be explained by its absence (more detailed discussion of this will be given below). The data given in Figure 1 clearly demonstrate the low level of innovativeness (i. e. the share of innovative products in the total sales) of manufacturing processes in Ukraine. It ranges from 1 to 1.5%, whereas in Poland it is 6% in average, and even 9.5% in the woodworking (2.3 percentage points higher than in Germany).





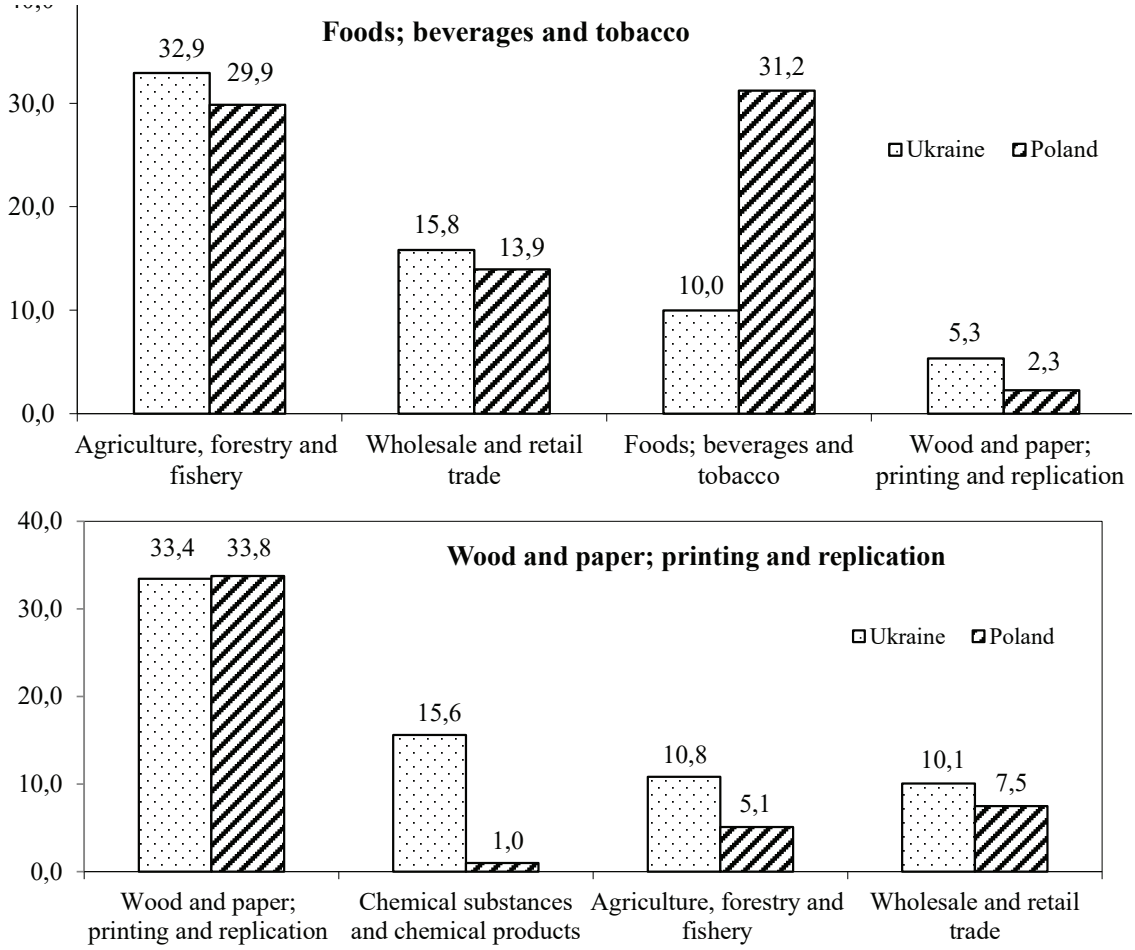


Figure 1. The costs and innovativeness in manufacturing industries, %

The structure of costs (or intermediate consumption) reflects the completeness of the technological cycle in the production process of manufacturing or the length of a value added chain. A measure like the share of own products in the intermediate consumption is an indicator of the depth (or phasing) of raw materials processing. As can be seen, this figure for Ukraine is close to the Polish one only in woodworking (Figure 2, constructed by data from [9; 10; 11]).

Of the four groups of manufacturing processes under study, only chemicals belong to medium-tech (by the Eurostat classification), with three others classified as low-tech. But the Ukrainian chemical industry mainly consists of low-tech manufacturing processes of non-organic chemistry which output dominates the domestic exports in this industry, whereas chemical exports in EU-28 consist of the output of high-tech manufacturing processes in organic chemistry and pharmaceutics, with less than 3% accounted for by non-organic chemicals. Also, Ukrainian chemical companies are resource and energy consuming (compared with Polish ones in particular), which is demonstrated by high shares of the crude oil, natural gas and electric energy in their intermediate consumption.

Results of in-depth author's studies of the domestic chemical industry (in comparison with EU countries in particular) and an analysis of their technological profile, production capacities utilization and performance indicators of the largest chemical companies in Ukraine enable the author to substantiate strategic orientations for the development of advanced chemical production processes and propose organizational and economic forms for realization of their potential, with focus on the Western region (Table 2, author's development).

Considering internal and external market conjunctures, most advanced manufacturing industries in Ukraine can be making textiles, apparel, leather and other materials. Problems and prospects of the light industry development in Ukraine are outlined by the results of performance assessment of these industries, their import dependence and export orientation in particular [12], and on the basis of a comparative analysis of the production facility structure in the light industry from regional perspective, by product type and product consumption segment [13].

The main problem impeding the development of domestic textile factories is high dependence on imported raw materials and components, such as textile (cotton and linen in the first place), leather, wool, fittings,

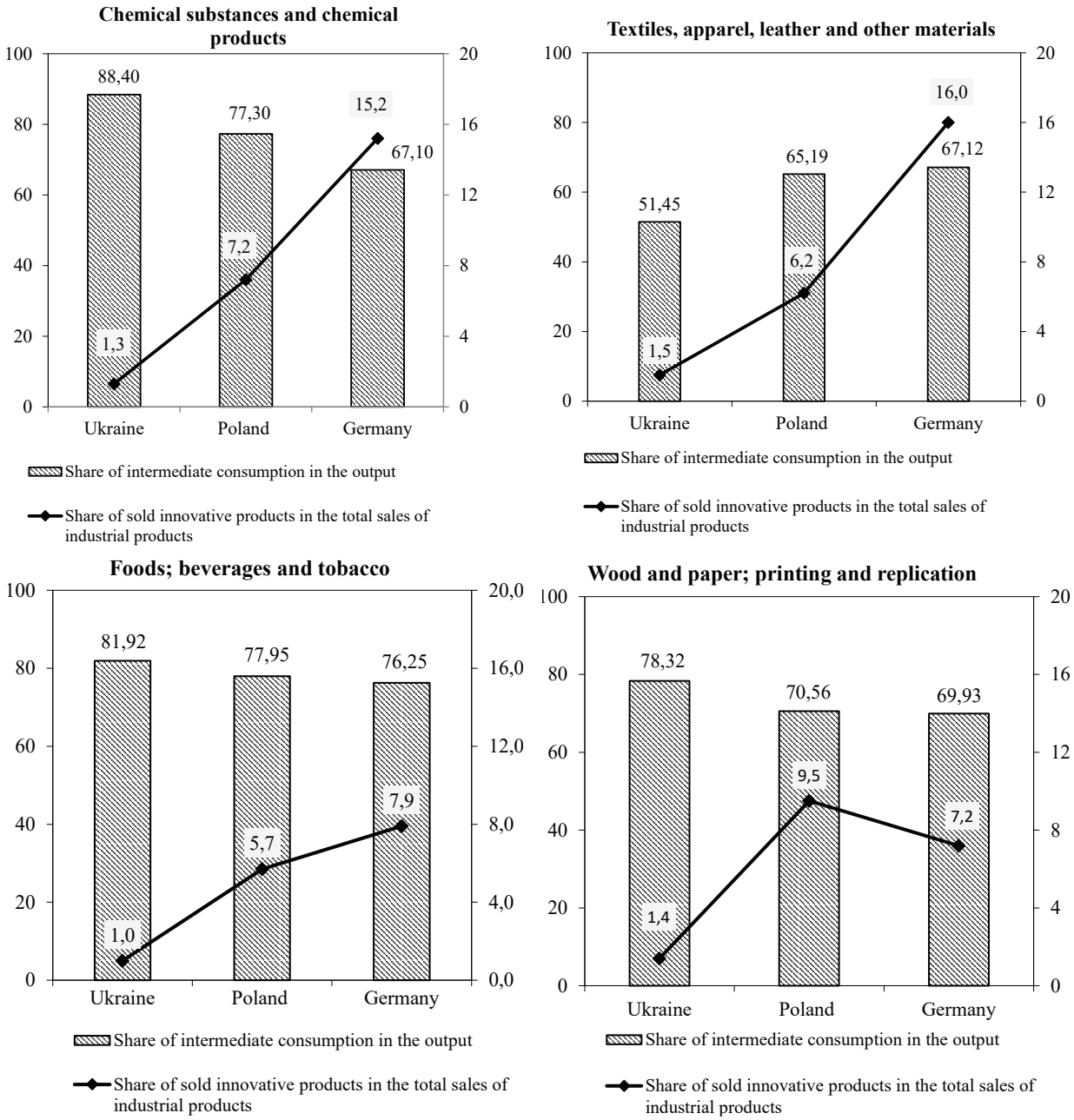


Figure 2. The structure of costs (in intermediate consumption) at manufacturing companies

threads, and fixed assets. The only way to solve this problem is to create or renovate/modernize capacities (factories) for processing wood, linen, technical cannabis, cotton, and for manufacturing artificial and synthetic fabric. The organizational form for implementing the development potential of textile factories in Ukraine is agrarian-industrial parks which will incorporate effective industrial and agricultural factories in the regions with favorable conditions for cultivation and procurement of the abovementioned raw materials.

The second, not less important, problem is low price competitiveness of domestic textile products on the internal market, caused by favorable terms for official and "grey" imports of second hand clothes and footwear, illegal domestic making and smuggling of textiles and finished products. This problem can be addressed by creating competitive conditions for the participants of internal market of textile and other manufactured products through liquidation of shadow deals by way of: establishing, in an obligatory manner, of transaction recorders (including computerized ones); licensing businesses of vendors of second hand clothes and footwear; increasing (given its consistence with the WTO rule) duty and tax rates on value added for imports of clothes, footwear, raw materials, textiles, fittings and light industry products that have actual or future potentials for manufacturing in Ukraine.

The third problem hampering the domestic light industry development is the reliance of a large part of factories (especially in the Western region) on give-and-take raw materials in product making. The sole way of solving this problem is to open domestic factories that will make products capable to replace give-and-take

Table 2

Forms for realization of the development potential of chemical productions in the Western region of Ukraine

Advanced production process	Form for realization of the potential
Soda industry (manufacturing of caustic soda)	A strategic orientation – internal and external markets: – expand the output on the material and technical facilities of "Karpatnaftokhim" company; – enhance protection of the internal market from unfair competition by creating equal terms for market access for domestic and foreign manufacturers using technical and custom barriers, administrative and regulatory measures
Manufacturing of ammonia (the input for production of nitric acid and nitrogen fertilizers)	A strategic orientation – internal and external markets: – retrofit "Rivneazot" company technically and technologically, to meet the demand of domestic agro-producers in nitrogen fertilizers, and expand of their assortment; – increase the capacities for ammonia processing and output of fertilizers with the strong demand on external markets (ammonium nitrate, carbamide, carbamide-ammonia mixtures etc.)
Manufacturing phosphate fertilizers	A strategic orientation – internal market: – create manufacturing facilities on enriching local phosphate and other raw materials for making phosphate containing fertilizers
Sulfuric (sulfate) acid industry, manufacturing of potassium salts and carbonate raw materials	A strategic orientation – internal market (import substitution): – extend the exploitation of the sources of mineral resource with investing shared funds of leading chemical companies by creating vertically and horizontally integrated entities with complete processing of raw materials (clusters, industrial chemical parks)
Manufacturing of technical carbon (a component in the manufacturing of rubber and other plastics)	A strategic orientation – internal market (import substitution): – increase production capacities of the public enterprise "Dashava factory of composite materials"; – impose custom and tariff limitations on competing imports
Manufacturing of cyclic hydrocarbons (benzene)	A strategic orientation – internal market (import substitution): – increase the production capacity utilization in "Karpatnaftokhim" company; – impose custom and tariff limitations on competing imports
Manufacturing of primary plastics and plastic products of industrial and household purposes	A strategic orientation – internal market (import substitution): – implement investment projects on creating import substitution production facilities (conveyer lines for making low-tonnage chemistry products) on the basis of medium and small enterprises; – expand the assortment of goods, provide for high quality engineering; – enhance price-based and commodity-based competitiveness of domestic manufacturers
Manufacturing of chemical products for housing & maintenance and automobile road construction (pipes and other materials)	A strategic orientation – internal market (import substitution): – create new production capacities, including ones with foreign capital; – modernize existing production facilities on the basis of innovative technologies; – start the production of new types of products
Manufacturing of input and supporting materials for furniture industry (carbamide-f ormaldehyde resins or glues) and light industry (synthetic colorants, chemical fibers and needles)	A strategic orientation – internal market (import substitution): – increase the available capacities of companies (group of companies "Polikom") with attracting foreign investment; – provide tax and custom & tariff preferences to domestic manufacturers for importing equipment and technologies with innovative focus

raw materials, and to create facilities inside operating domestic factories for further processing (or use) of the finished products made of give-and-take raw materials.

Given the existing natural and resource potential of Ukraine, one of the most advanced areas for the development of the domestic manufacturing industry can be woodworking. More than 40% of the domestic woodworking output is accounted for by the Western region, four oblasts of which (along with Zhytomyr and Kyiv ones) have the highest potential in procurement and industrial processing of wood (Table 3, author's development).

Table 3

Grouping of Ukrainian regions by the potential of procurement and industrial processing of wood

Group number	Characteristic of group	Composition of group	
		2010	2019
I	Significant scopes of procurement of marketable wood and its industrial output	Volyn, Zhytomyr, Ivano-Frankivsk, Kyiv, Lviv, Rivne, Chernihiv	Volyn, Zhytomyr, Ivano-Frankivsk, Kyiv, Lviv, Rivne
II	Significant scopes of industrial processing of marketable wood along with small volumes of its procurement	Dnipropetrovsk, Donetsk, Luhansk, Kharkiv, Vinnytsia, Zakarpattia, Sumy, Chernivtsi	Dnipropetrovsk, Luhansk, Kharkiv
III	Insignificant scopes of industrial processing of marketable wood along with large volumes of its procurement		Zakarpattia, Sumy, Khmelnytskyi, Chernivtsi
IV	Insignificant scopes of procurement and industrial processing of marketable wood	Khmelnytskyi, Zaporizhzhia, Kirovohrad, Mykolaiv, Odesa, Poltava, Ternopil, Khrson, Cherkasy	Vinnytsia, Donetsk, Zaporizhzhia, Kirovohrad, Mykolaiv, Odesa, Poltava, Termopil, Kherson, Cherkasy, Chernivtsi

The woodworking industry is a strategic export-oriented segment of the national economy. Advanced areas for the woodworking industry development in the oblasts of Western region could be revealed by the results of an assessment of the structure and dynamics of woodworking product distribution in Ukraine, in-depth research of the manufacturing and export potentials of domestic woodworking factories, and analysis of their technological specialization (by main product group) [14]. This enabled to determine mainstream strategies for implementing the potential of woodworking industry development in these oblasts with focus on internal and external markets (Table 4, author's development).

Table 4

Forms for implementing the potential of woodworking industry development in the Western region

Advanced types of manufacturing	Oblast	Form for implementation of the potential
Plywood making	Volyn, Zakarpattia, Ivano-Frankivsk, Rivne	A strategic orientation – increase exports: – expand the output thought increasing the capacities of large companies and attracting foreign capital (creating joint ventures)
Making of joinery and wooden structures, including for construction purposes (furniture, windows, floors, scaffolding etc.)	Volyn, Zakarpattia, Ivano-Frankivsk, Lviv, Rivne, Ternopil, Chernivtsi	A strategic orientation – internal and external markets: – modernize the existing material and technical facilities of medium and small enterprises; – create joinery (furniture) clusters on the basis of horizontal and vertical integration of entities engaged in woodworking and infrastructural sectors of the economy
Making of alternative decoration materials for furniture (wood-based slabs)	Volyn, Lviv, Rivne	A strategic orientation –external market: – develop production facilities by involving foreign capital and innovation technology transfer
Making of energy saving construction and insulating materials, panels of cross-laminated wood	Volyn, Lviv, Rivne	A strategic orientation – internal and external markets: – attract investment resources of international organizations for financing innovation projects in energy efficiency; – create innovative industrial complexes specializing on deep waste-free processing of wood
Making of wooden pellets	Volyn, Zakarpattia, Ivano-Frankivsk, Lviv, Rivne, Chernivtsi	A strategic orientation – internal and external markets: – implement innovative projects in bioenergy on the basis of new technology (e. g. through government-private partnerships)
Making of paper and paper products	Lviv, Ternopil	A strategic orientation – internal market (import substitution): – expand the output on the existing material and technical facilities ("Zhydachiv pulp and paper mill" company, "Bivlios" company, "Zakhid karton" company)

Ukraine has vast manufacturing and export potentials in the segment of processing of agricultural products, but the domestic agro-industrial complex still remains at the phase of deep transformation, to abandon post-soviet operation rules and standards and adopt global ones and European ones in the first place.

Only a minor share (6.54% in 2018) of the crop yield (wheat and rye) is processed into flour in Ukraine. The main reasons are the shrinking demand for wheat milling products on the domestic consumer market and the reduced industrial use of flour. At the same time, closure of the Russian food market along with opening of the EU market pushed up modernization of technologies for meat and dairy products making, increased their quality and expanded the assortment. However, a number of unresolved interconnected problems still exists in Ukraine, hampering altogether the facility expansion in these industries. The main problem in the segment of meat and meat products is the shrank input base, first and foremost in pig and cattle breeding: 66.5% of the cattle and 42.4% of the pig stock in Ukraine are raised in household farms that are chronically incapable to ensure appropriate technological, sanitary and organizational conditions for the mass-scale procurement of high quality sorts of raw meat.

Comprehensive studies of the performance, dynamics and effectiveness of crop, meat and milk processing facilities in Ukraine, from the regional perspective in particular, enabled to outline the key problems faced by this segment of the domestic manufacturing industry:

1) the decreased capacity utilization of flour milling factories and their low profitability rate (1.7%);

2) the decreased quantities of raw meat (pork and beef) available for industrial processing along their high cost;

3) inadequate fodder base of the cattle breeding (expensive fodder, most part of which is of bad quality);

4) inadequate capacity and low quality of raw milk for the industrial milk processing;

5) the existence of shadow segment and large scopes of falsified products on the internal milk and dairy market;

6) limited scopes of Ukrainian milk and dairy exports along with increasing imports of this products.

The advanced areas for the development of agro-processing facilities in Ukraine are as follows:

– create production capacities for deep processing of crops, such as ones for making food additives and concentrates (starch, glucose-fructose syrups etc.) or containers (bio-plastic) for food industry products;

– launch waste-free productions involving maximal inclusion of raw milk (and recycled milk products) in the industrial processing for making competitive products with long shelf life (milk sugar, hydrolysates of milk fat and protein, lactose derivatives etc.);

– meet the internal demand and increase the export capacity in the segment of niche (ecological and premium) types of meat and dairy products, which is supposed to stimulate the development of small and medium agro-business, first and foremost in highland regions.

The mechanisms for implementing the development potential of agro-processing factories are as follows:

• introduce innovative technologies for cultivating crops along with improving technical equipment of flour milling factories, to enhance the quality of finished products and meet global standards;

• stimulate cooperation and integration (horizontal-vertical) of agricultural and industrial producers in primary processing, procurement and distribution of products; develop transport infrastructures in rural areas;

• elaborate and implement medium-term and long-term programs for stimulation of dairy farming (in view of long periods of investment returns in dairy farming); support adaptation of raw milk and dairy producers to European technological norms of production and quality control;

• improve logistics for promotion of domestic food industry products to the global market, to avoid potential price or quality-related losses.

Conclusions and recommendations. The Ukrainian industry features high import dependence, with more than 50 percent share of imports in the intermediate consumption of the manufacturing, while in the EU countries the average figure is ≈37%. The Ukrainian economy is most heavily dependent on materials and components in chemicals and chemical products (>80%); textiles, apparel, leather and other materials (>60%). It actually means that domestic factories and organizations in manufacturing but also in other sectors (financial, social) cannot operate without imported goods of chemical and light industry. It clearly shows that the above industries should be put in focus of the import substitution policy. Another argument for the need to reduce the import dependence of the national economy on chemical and light industry products is that these industries became priority ones in the industrial development of Poland since its accession to EU.

The development of chemical industry in Ukraine can be pushed up by the strong sides of this manufacturing industry sector, first of all by its endowment with domestic minerals, high external and internal market potential. But it still faces a number of problems that have to do with supply of cost-effective raw materials (for organic chemistry

production first and foremost), raising of investment funds to radically improve the technological level in the production of non-organic chemicals and enhance their competitiveness. These and other problems faced by the domestic chemical industry cannot be solved without structural reforms aiming to increase the share of high tech products in the output structure, diversify the raw material base, introduce innovations by involving government support to the sectoral development, at regional level in particular. Therefore, development prospects in the chemical industry of Ukraine should be looked at through the prism of intensifying basic productions of non-organic and organic chemistry, reducing import dependence of the national economy on certain types of chemical products, and restructuring chemical exports in compliance with industrial countries of EU.

The development of light industry in Ukraine is hampered by three core problems: (i) heavy dependence on imported raw materials, components and fixed assets; (ii) low price competitiveness of domestic products on the internal market; (iii) mass-scale engagement of factories in the production based on give-and-take raw materials. It follows that a priority objective should be recovering (with subsequent increasing) raw material supplies to textile and other factories in Ukraine through creating or modernizing production capacities (factories) in processing of cotton, linen etc. and making artificial and synthetic fibers. Not less important objective is to ensure competitive terms in the internal market of textile and other products through elaborating and implementing respective normative, technical and staff measures to stop the flows of "shadow" imports of footwear and clothes to Ukraine and their illegal domestic making.

Ukraine has the raw material potential sufficient to ensure rapid development of the woodworking industry. It is confirmed by the sixth position of Ukraine among the EU countries by the wood endowment and the seventh position by the procurement of marketable wood. The main problems hampering the development of woodworking facilities in Ukraine are as follows: limited access of domestic factories to raw materials (resulting from the unresolved status of the internal wood market); shadow deals in the woodworking sector (foreign trade in particular). In view of this, we believe that an economically viable step will be creating integrated business entities, first and foremost in the Western region, as most part of its oblasts have high potentials in the procurement of marketable wood. Comprehensive interactions of wood industry and infrastructural sectors of the economy enables: (i) to meet the needs of woodworking factories in raw materials through organizing their mutually beneficial interactions with wood procurement factories; (ii) to fully employ the potential of woodworking sector in the region; (iii) to support and stimulate the investment activity. Altogether it will help achieve the high competitiveness of domestic woodworking products, introduce them on external markets and enhance the performance of woodworking factories.

The development of domestic factories in the food industry, in particular in the segment of making products of crops and especially ones of flour is also based on the powerful raw material potential. Considering the growing global demand for products made of crops, Ukraine will not be able to process large quantities of crops unless it has a powerful and diversified food industry which advanced segment is supposed to be deep processing of crops. Stimuli provided to the development of these production facilities can be an effective instrument for implementing import substitution policy and expand the presence of domestic producers on premium markets with high value added.

An efficient form for the development of small agro-processing facilities (owned by small farms or individuals) dominating in the Western regions is their cooperation for shared production, access to financial or material resources and promotion of their products. An organizational and economic form for further development of such cooperatives in Ukraine is believed to be their integration in the operation of agrarian-industrial parks that are in a way analogous to industrial parks. This mechanism can be employed in the regions with good conditions for cultivation of some animal species, first and foremost to achieve quantitative and qualitative improvements in raw material supplies of meat processing factories.

Further research is expected to focus on elaborating criteria and economic-mathematical models for the structural transformation of manufacturing industry in Ukraine.

The article presents essential results of the research entitled "Forms for implementing the development potential of manufacturing industries in the Western region of Ukraine" (number of official registration 0118U003054).

References

1. Penrose, E. T. (2009). *The Theory of the Growth of the Firm*. (4th ed.). Oxford University Press. DOI:10.1093/0198289774.001.0001

2. Pfeffer, J., & Salancik, Gerald R. (1978). *The External Control of Organizations: A Resource Dependence Perspective*. New York: Harper & Row.

3. Grant, R. M. (1991). The Resource-based Theory of Competitive Advantage: Implications for Strategy Formulation. *California Management Review, Vol. 33, Issue 3,* 114–135. Retrieved from https://doi.org/10.2307/41166664

4. Teece, D. J., Pisano. G., & Shuen, A. (1997) Dynamic Capabilities and Strategic Management. *Strategic Management Journal, Vol. 18, 7,* 509–533.

5. Hamel, G., & Prahalad, C. K. (1994). *Competing for the Future.* Boston: Harvard Business School Press.

6. Barney, J., Wright, M., & Ketchen, D. J. Jr. (2001). The Resource-based View of the Firm: Ten Years after 1991. *Journal of Management. Vol. 27, 6.* 625–641. Retrieved from https://onlinelibrary.wiley.com/doi/epdf/10.1002/%28SICI%291097-0266%28199708%2918%3A7%3C509%3A%3AAID-SMJ882%3E3.0.CO%3B2-Z

7. Durand, Th. (2005). Alkhimiya kompetentsii [The Alchemy of Competence.]. *Strategic Flexibility: Managing in a Turbulent Environment.* G. Hamel, C. K. Prahalad, H. Thomas, D. O'Neal (Eds.). (Part 16). Sankt-Peterburg: Piter [in Russian].

8. Ishchuk, S. O., Sozanskyy, L. Y., Poliakova, Yu. V., Koval, L. P., Kudria, Ya. V., Liakhovska, O. V., et al. *Pererobna promyslovist rehioniv Ukrainy: problemy ta perspektyvy rozvytku [Processing industry of the regions of Ukraine: problems and prospects of development].* S. O. Ishchuk (Ed.). Lviv: SI "Institute of Regional Research named after M. I. Dolishniy of the NAS of Ukraine". Retrived from http://ird.gov.ua/irdp/p20200002.pdf [in Ukrainian].

9. National accounts aggregates by industry (up to NACE A*64). (2020). Official website of Eurostat. *appsso.eurostat.ec.europa.eu.* Retrieved from http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=nama_10_a64&lang=en

10. Tablytsia "vytraty-vypusk" za 2018 rik v osnovnykh tsinakh: stat. zb. [Table input-output of Ukraine for 2018 at basic prices: Statistical Publication]. (2020). *State Statistics Service of Ukraine*. Retrieved from http://www.ukrstat.gov.ua/druk/publicat/kat_u/2020/zb/05/zb_tvv_18.pdf [in Ukrainian].

11. STAN Input-Output: Imports content of Exports. 2012. (2020). OECD.Stat. *Official website of Organization for Economic Co-operation and Development.* Retrieved from https://stats.oecd.org/Index.aspx?DataSetCode=STAN_IO_M_X

12. Ishchuk, S. O., & Sozanskyy, L. Yo. (2020). Problemy ta osoblyvosti rozvytku lehkoi promyslovosti v Ukraini: statystychnyi porivnialnyi analiz iz krainamy Yevrosoiuzu [Problems and Peculiarities of the Light Industry Development in Ukraine: A Statistical Comparison with EU Countries]. *Statystyka Ukrainy – Statistics of Ukraine, 1,* 42–50 [in Ukrainian]. Doi: 10.31767/su.1(88)2020.01.05.

13. Ishchuk, S. O., & Sozanskyy, L. Yo. (2019). Rehionalni aspekty rozvytku vyrobnytstv lehkoi promyslovosti v Ukraini [Regional aspects of the development of light industry in Ukraine]. *Rehionalna ekonomika – Regional economy, 4,* 64–73 [in Ukrainian]. Doi: https://doi.org/10.36818/1562-0905-2019-4-5.

14. Ishchuk, S. O., & Koval, L. P. (2020). Potentsial rozvytku derevoobrobnykh vyrobnytstv u Zakhidnomu rehioni Ukrainy ta napryamky yoho realizatsii [The potential for the development of woodworking industries in the Western region of Ukraine and the directions of its implementation]. *Sotsialno-ekonomichni problemy suchasnoho periodu Ukrainy – Socio-economic problems of the modern period of Ukraine, Vol. 141, 1,* 45–51. DOI: https://doi.org/10.36818/2071-4653-2020-1-7 [in Ukrainian].

С. О. Іщук,
доктор економічних наук, професор,
завідувач відділу,
E-mail: iso.ird@ukr.net
ResearcherID: G-6417-2019,
ORCID: https://orcid.org/0000-0002-3698-9039;
Л. Й. Созанський,
кандидат економічних наук,
старший науковий співробітник,
E-mail: ls.ird2@ukr.net
ResearcherID: G-5930-2019,
ORCID: https://orcid.org/0000-0002-3698-9039;
ДУ "Інститут регіональних досліджень імені М. І. Долішнього НАН України"

Оцінка потенціалу розвитку окремих виробництв переробної промисловості в Україні

Для забезпечення конкурентоспроможності на світових ринках в умовах поглиблення глобалізаційних процесів Україні необхідне налагодження переробки власної сировинної бази, що дозволить якісно

змінити структуру українського експорту із переважно сировинних позицій на товари з високою часткою доданої вартості. Метою статті є оцінювання потенціалу розвитку хімічних, текстильних, агропереробних і деревообробних виробництв України на засадах імпортозаміщення й експортоорієнтації та обґрунтування організаційно-економічних форм його практичної реалізації.

Запропоновано авторське тлумачення терміна "потенціал розвитку промислової системи". Визначено особливості функціонування переробної промисловості в Україні на підставі порівняльної оцінки тісноти міжсекторальних зв'язків, рівня витратності й інноваційності вітчизняних і європейських хімічних, текстильних, деревообробних та агропереробних виробництв. За результатами аналізу технологічного профілю, рівня завантаженості виробничих потужностей і результативних показників діяльності найбільших хімічних підприємств України обґрунтовано стратегічні орієнтири розвитку перспективних хімічних виробництв та запропоновано організаційно-економічні форми реалізації їх потенціалу, зокрема у Західному регіоні.

Надано пропозиції щодо забезпечення конкурентних умов для учасників внутрішнього ринку продукції легкої промисловості, обґрунтовано необхідність упровадження спрощених регуляторних процедур та інвестиційних стимулів для забезпечення розвитку вітчизняних підприємств легкої промисловості. Розроблено організаційний механізм відновлення сировинної бази текстильних та інших виробництв. Здійснено групування регіонів України за потенціалом заготівлі деревини та її промислової переробки. Визначено перспективні напрями розвитку деревообробної промисловості в областях Західного регіону (у розрізі виробництв) та окреслено базові стратегії їх реалізації, зорієнтовані на внутрішній і зовнішній ринки збуту продукції. Комплексно досліджено проблематику функціонування в Україні агропереробних виробництв крізь призму їх ресурсного забезпечення у регіональному розрізі. Окреслено ключові проблеми та обґрунтовано перспективи розвитку зерно-, м'ясо- і молокопереробних виробництв з огляду на поточні та прогнозні тренди кон'юнктури на відповідних товарних ринках. Запропоновано організаційні форми реалізації потенціалу розвитку агропереробних виробництв в Україні та механізми їх інституційної підтримки.

Ключові слова: *промисловість, переробне виробництво, потенціал, форми реалізації потенціалу, розвиток, перспективні напрями.*

Bibliographic description for quoting:

Ishchuk, S. O., & Sozanskyy, L. Yo. (2020). An Assessment of the Development Potential of Manufacturing Industries in Ukraine. *Statystyka Ukrainy – Statistics of Ukraine, 4,* 21–31. Doi: 10.31767/su.4(91)2020.04.03.

Бібліографічний опис для цитування:

Іщук С. О., Созанський Л. Й. Оцінка потенціалу розвитку окремих виробництв переробної промисловості в Україні (публікується англійською мовою). *Статистика України*. 2020. № 4. С. 21–31. Doi: 10.31767/su.4(91)2020.04.03.