

Research on the current state and needs of businesses in Ukraine

September, 2022

Center for
Innovations
Development

ОФІС З РОЗВИТКУ
ПІДПРИЄМНИЦТВА
ТА ЕКСПОРТУ
ДЕРЖАВНА УСТАНОВА

Дія Бізнес

Advanter

Міністерство
цифрової трансформації
України

МІНІСТЕРСТВО
ЕКОНОМІКИ
УКРАЇНИ

МІНІСТЕРСТВО
ФІНАНСІВ
УКРАЇНИ

Міністерство розвитку
громад та територій України

MINISTRY
FOR TEMPORARILY OCCUPIED TERRITORIES
AND INTERNALLY DISPLACED PERSONS

USAID
ВІД АМЕРИКАНСЬКОГО НАРОДУ

Technical information and methodological notes

This publication was prepared by the Center for Innovations Development, Export and Entrepreneurship Promotion Office, and Diia.Business national project jointly with Advanter Group, with the support of the European Union, Ministry of Digital Transformation, Ministry of Economy, Ministry of Finance, Ministry of Communities and Territories Development, the Coalition of Business Communities for the Modernization of Ukraine, and the USAID Competitive Economy Program in Ukraine.

This publication reflects the position of the authors and does not necessarily reflect the opinion of the European Union.

The research was carried out within the framework of [the Initiative](#) for economic recovery, business development and export of Ukraine.

Methodology and analytics: Advanter Group, advanter.ua

Method: online survey of business owners and CEOs.

Survey periods and sample size :

Survey period : 09.09 – 19.09.2022 p.

A total of 863 respondents took part in the survey.

The entrepreneurs interviewed represent all regions of Ukraine and various industries (slide 104 –passport block).

An analysis was carried out on some issues in the following aspects :

- macro regions
- industries
- size of business (pre-war)
- data from [previous waves of business research](#) (Advanter) and [the Initiative for economic recovery](#) (CID, EEPO, Diia.Business)

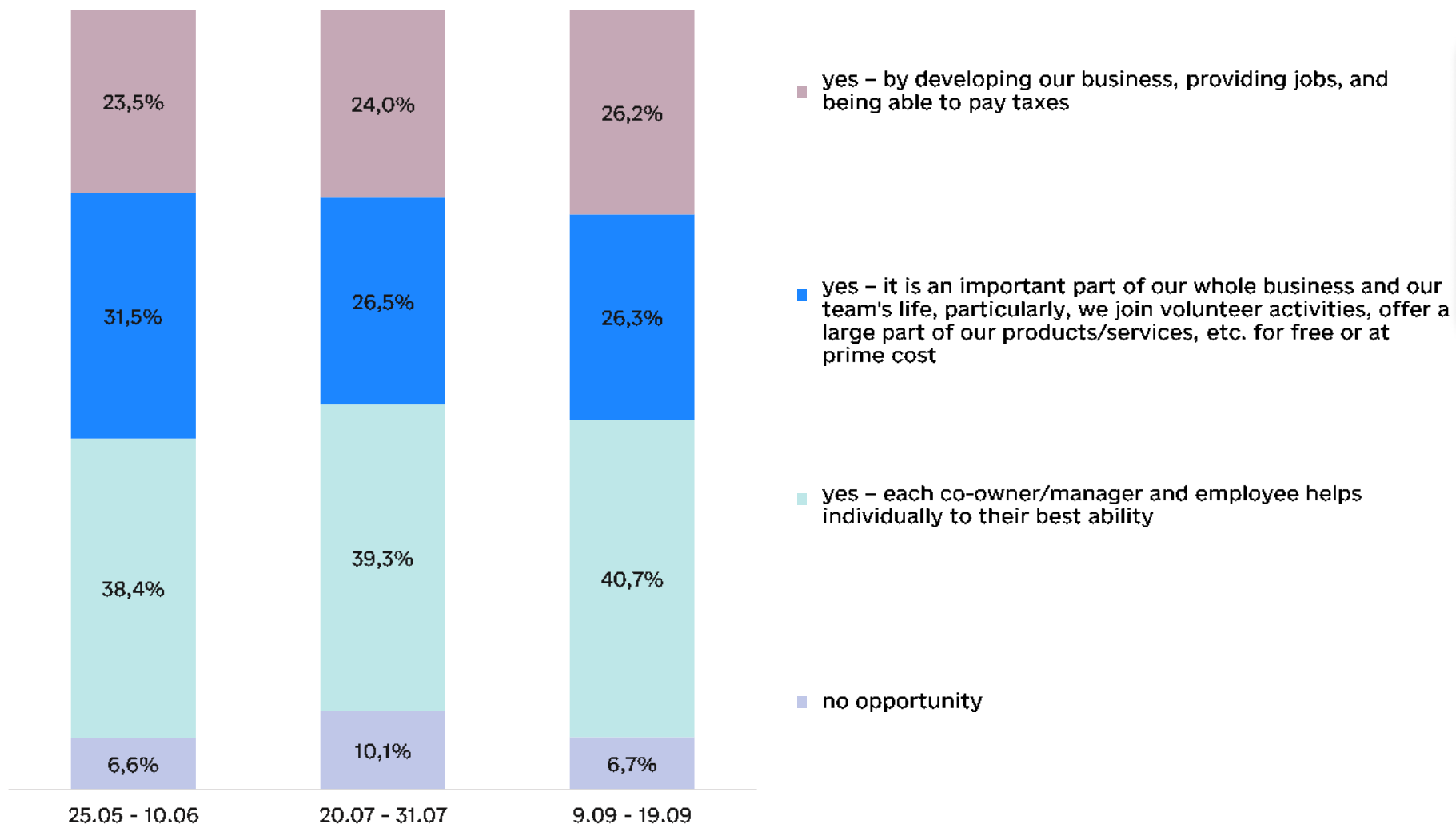
Generalizations are made based on the State Statistics Service data for 2020 and 2021.

The Business Activity Index UBI has been calculated since 2020. The Index is unified for manufacturing and service businesses.

Contact details : info@advanter.ua | info@cid.center | analytic@epo.org.ua

Main results

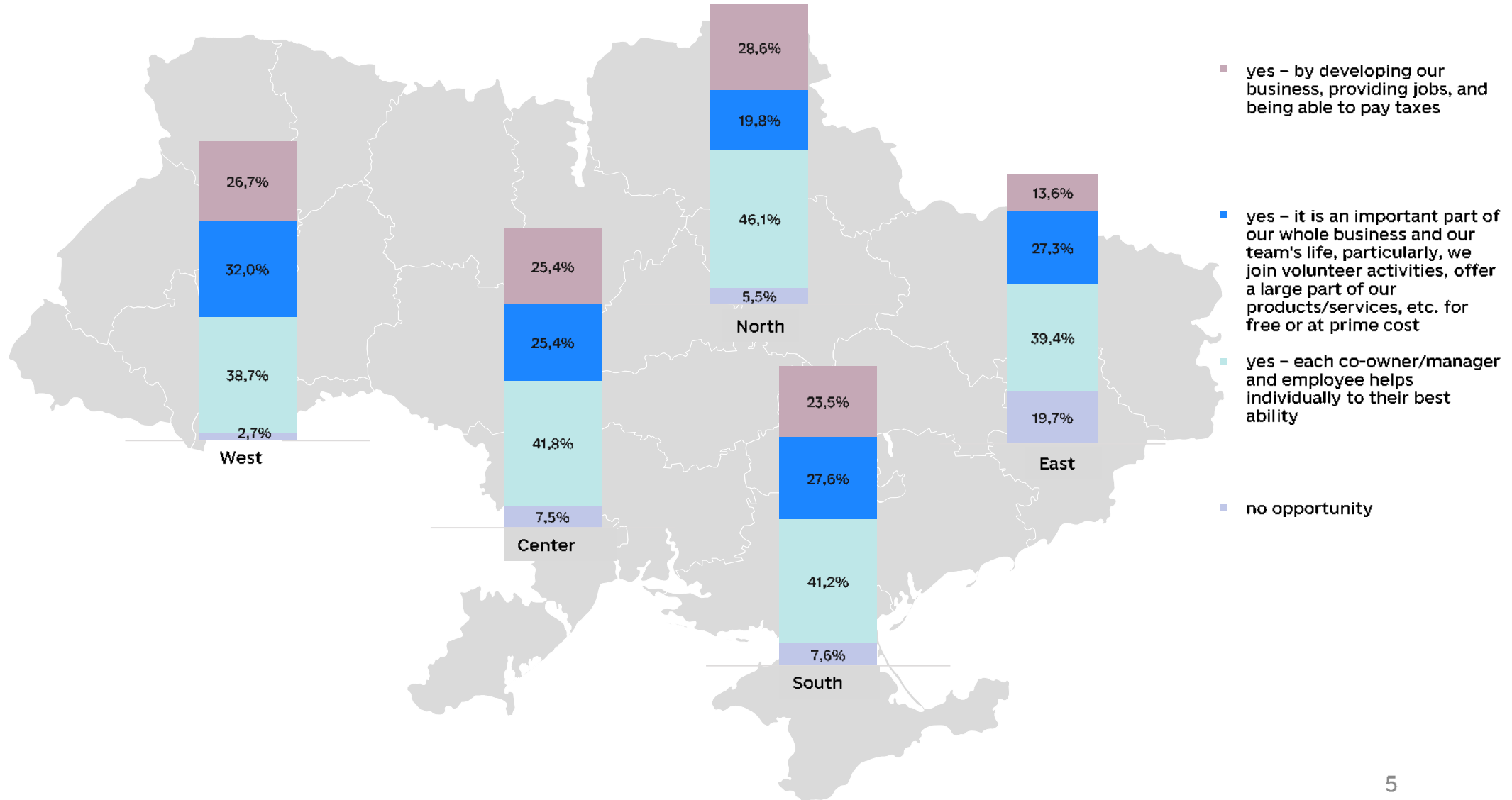
Is the business helping Ukraine win the war?



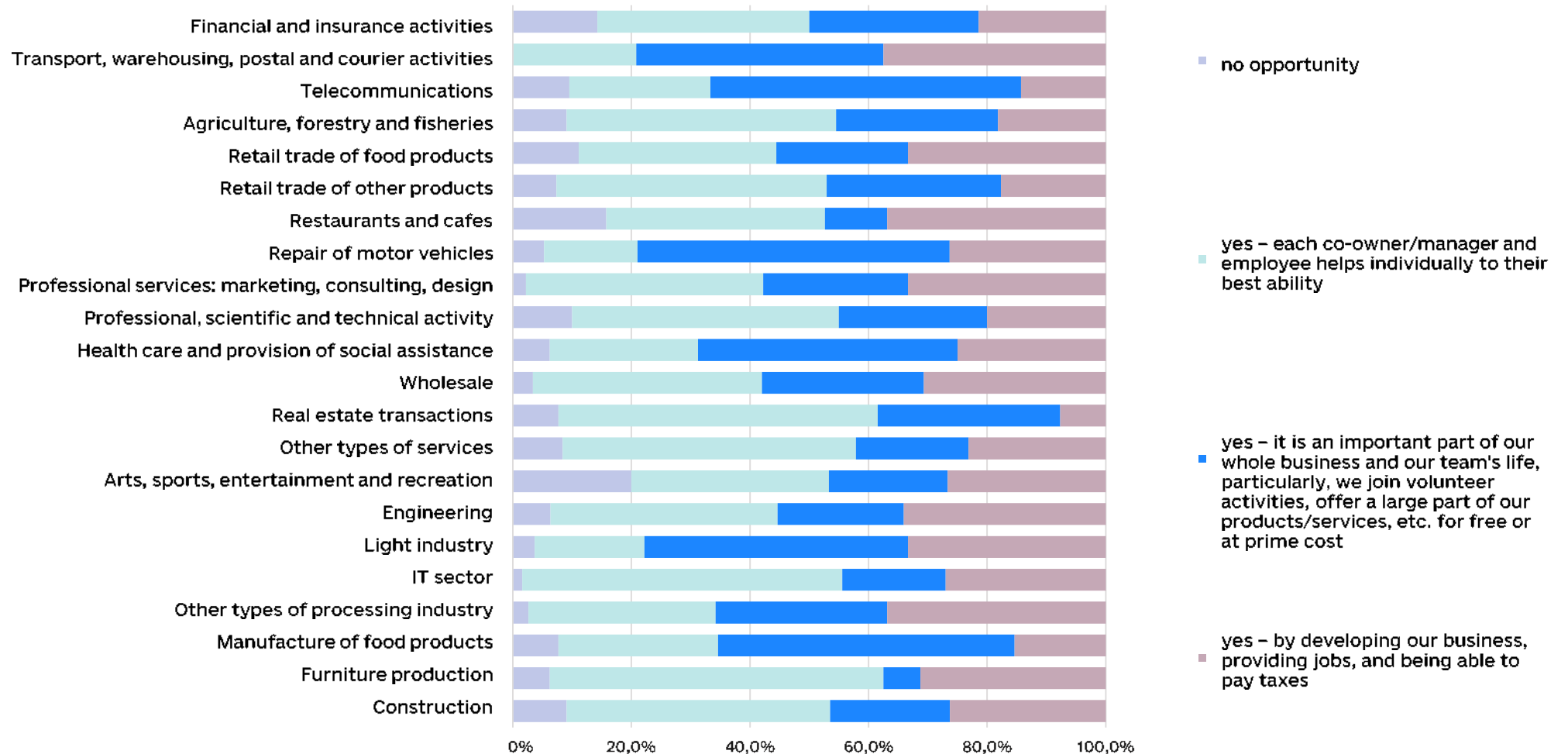
67.1%
of businesses
joined the
volunteer activity

Is the business helping Ukraine win the war?

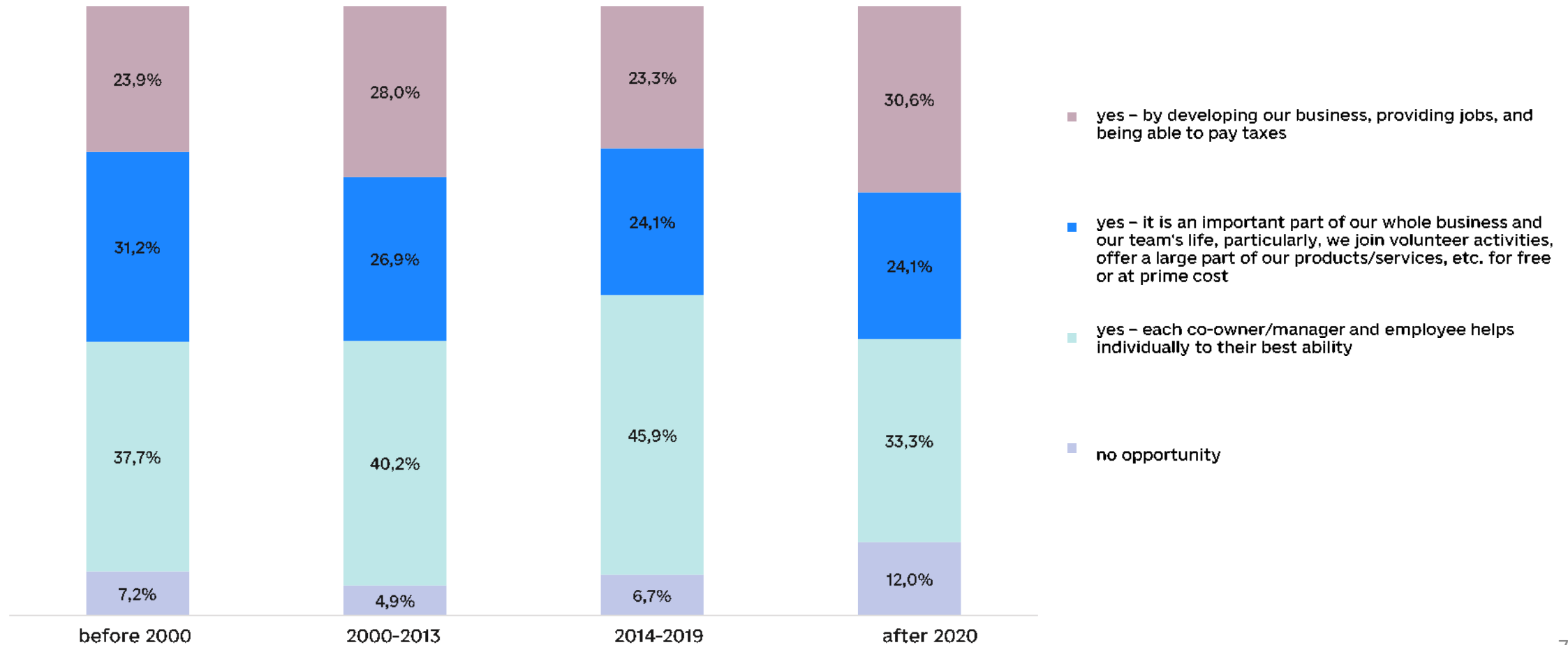
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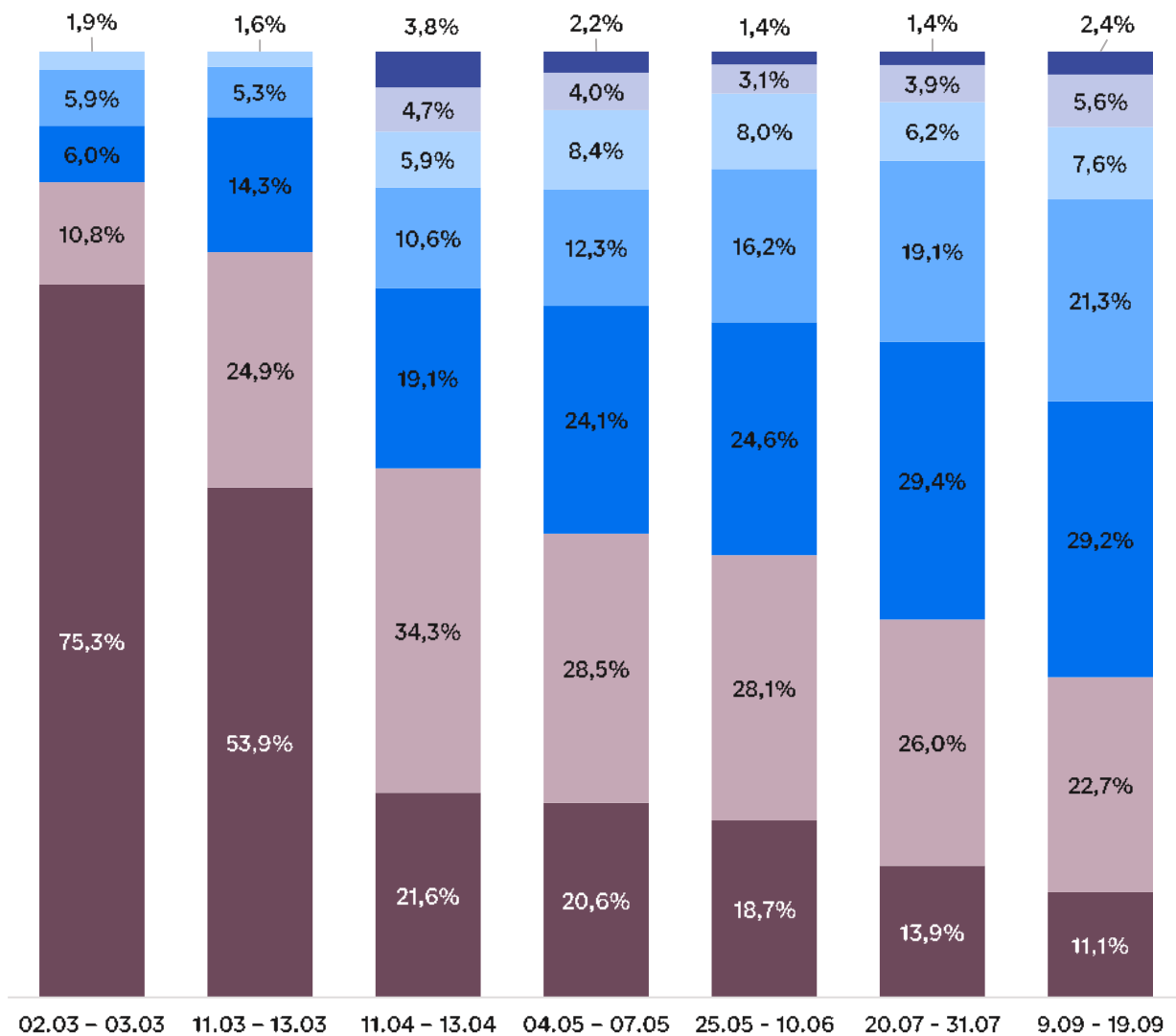
Is the business helping Ukraine win the war? (by industry)



Is the business helping Ukraine win the war? (year of business establishment)



The state of businesses compared to the period before 24.02.2022



33.8%

enterprises are stopped or almost stopped

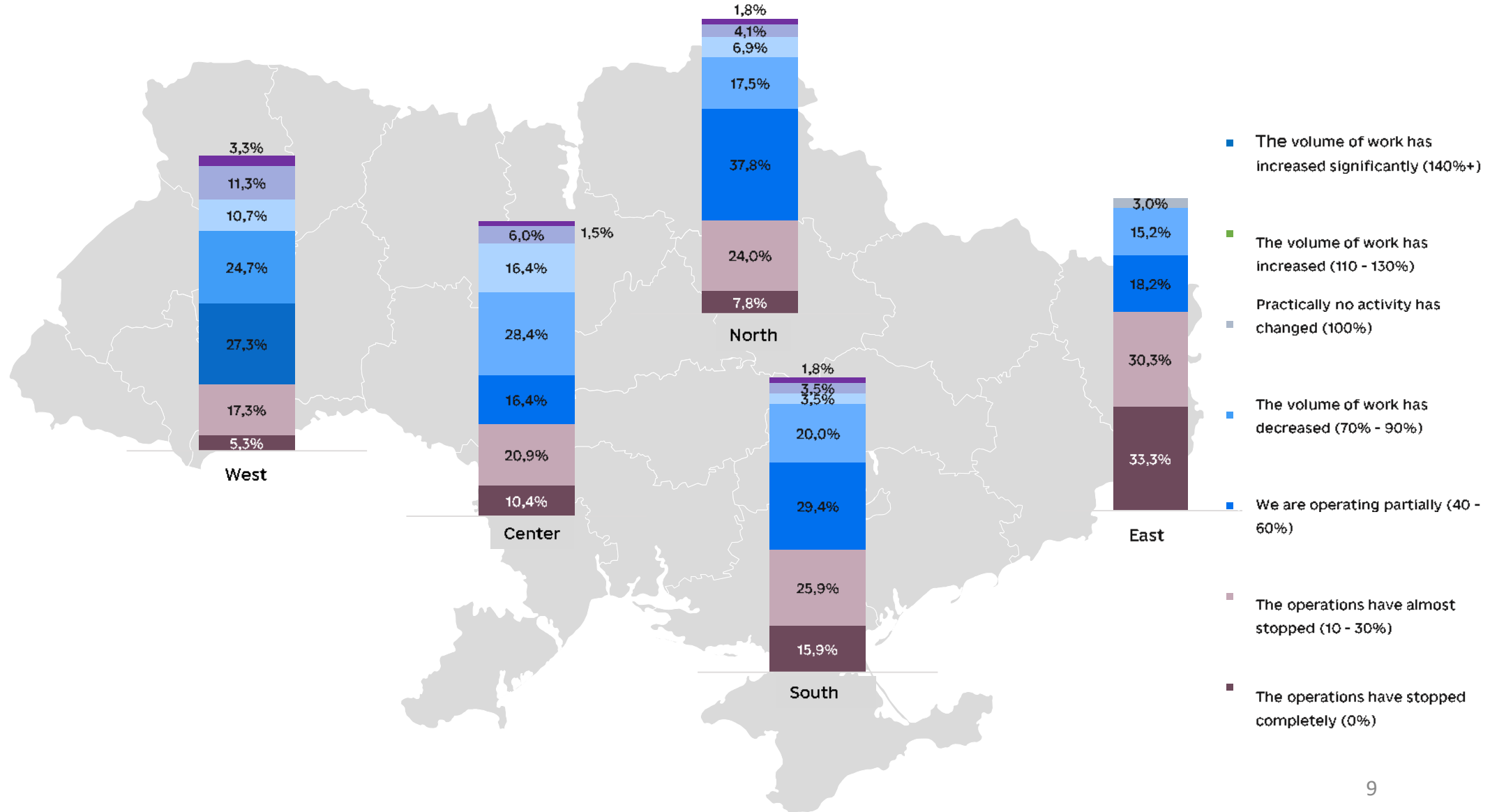
15.6%

did not change or increased the scope of work compared to 24.02

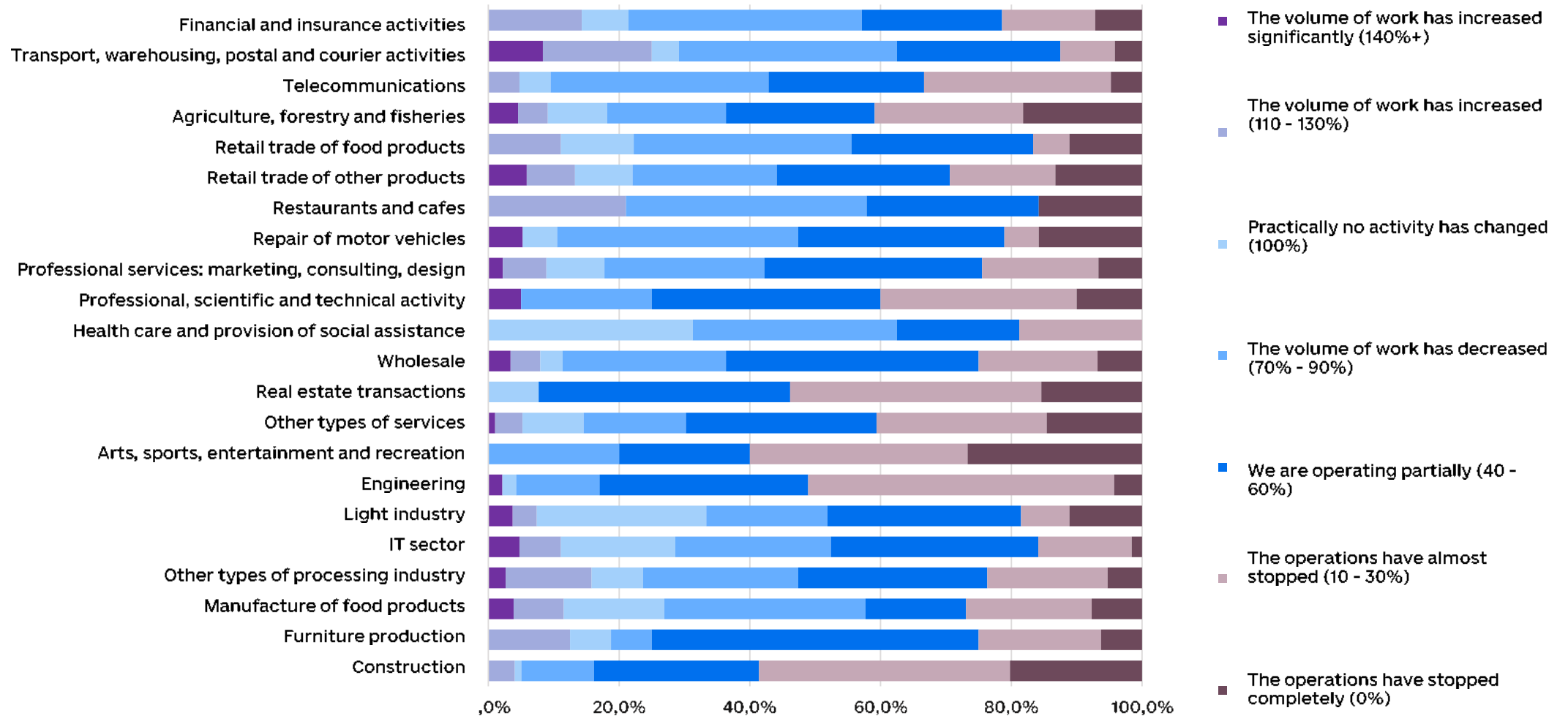
- The volume of work has increased significantly (140%+)
- The volume of work has increased (110 - 130%)
- Practically no activity has changed (100%)
- The volume of work has decreased (70% - 90%)
- We are operating partially (40 - 60%)
- The operations have almost stopped (10 - 30%)
- The operations have stopped completely (0%)

The state of businesses compared to the period before 24.02.2022

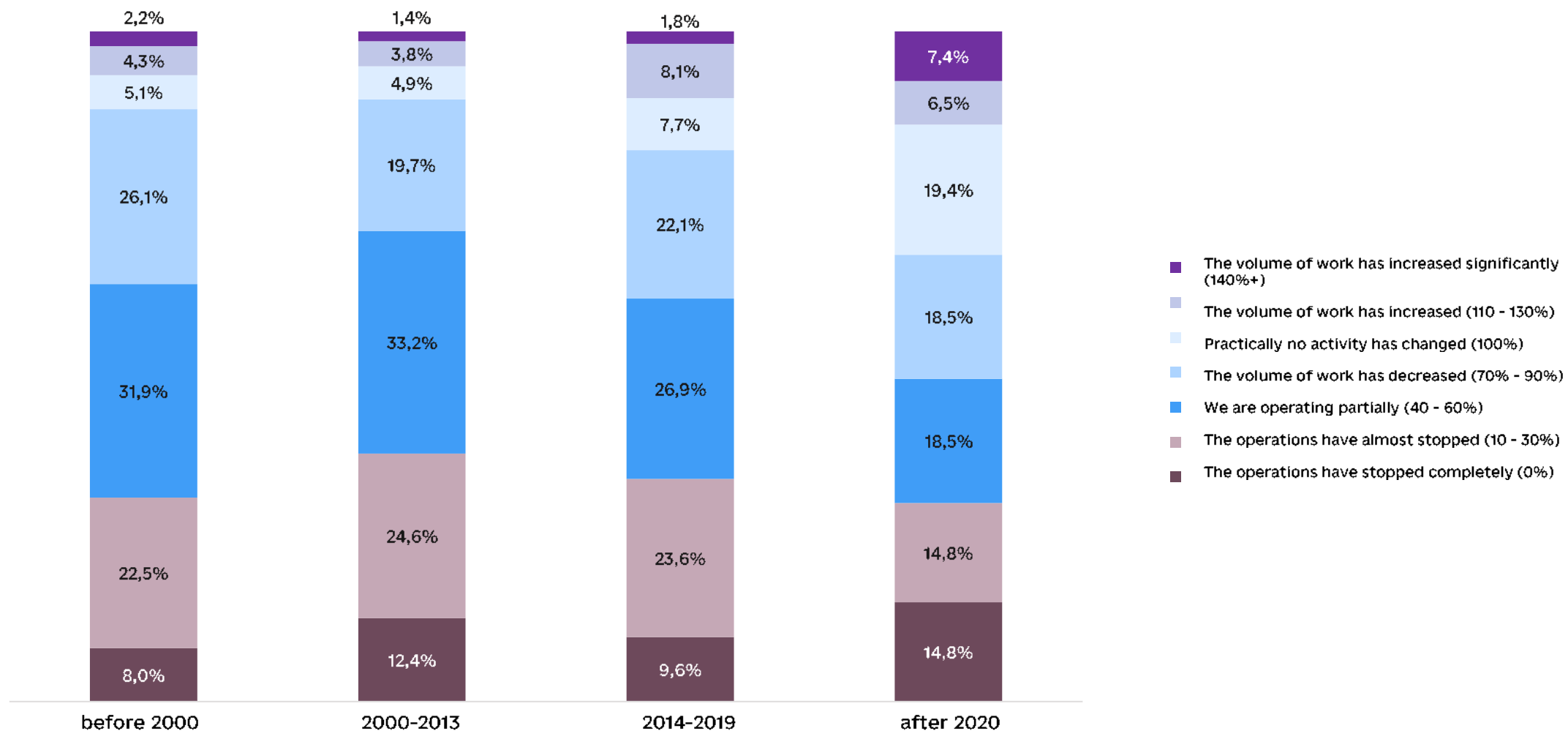
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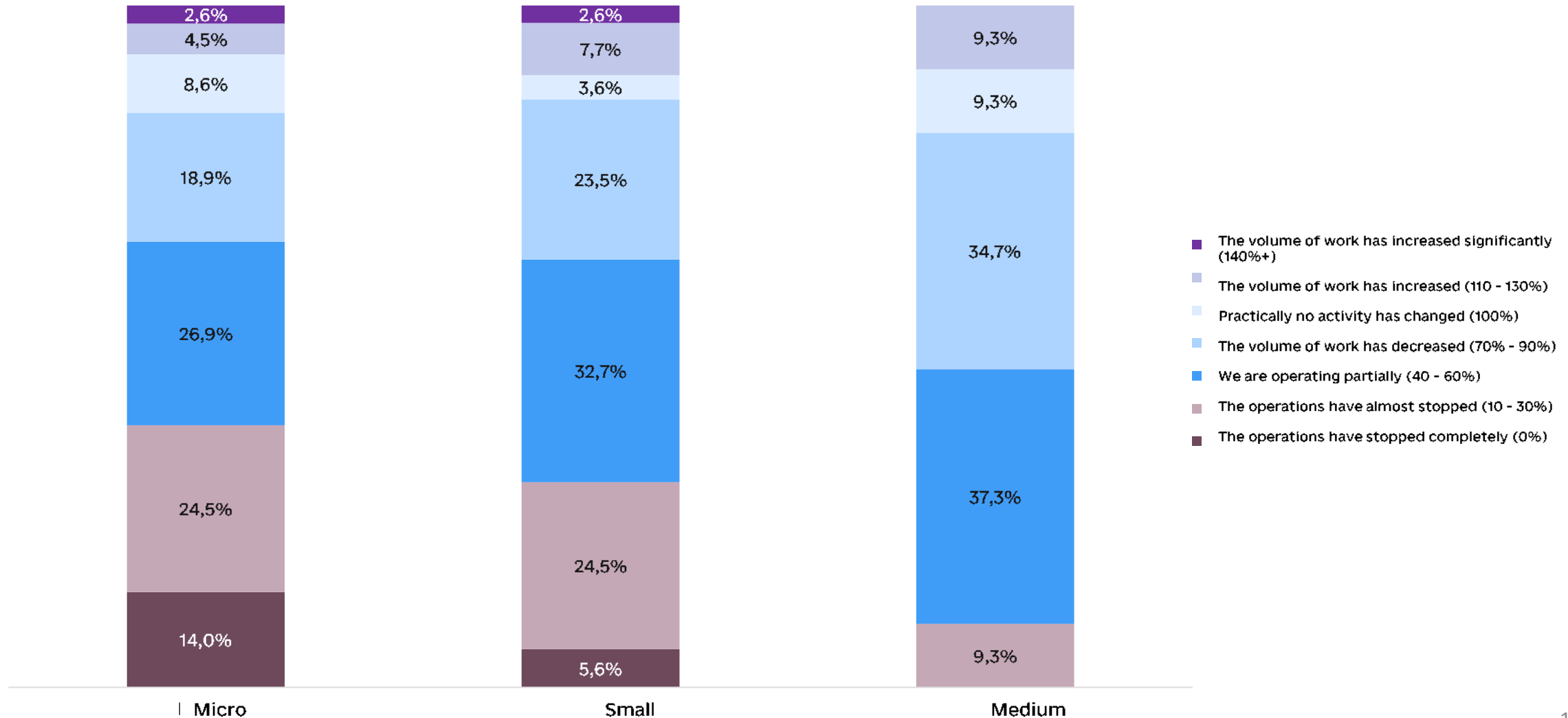
The state of businesses compared to the period before 24.02.2022 (by industry)



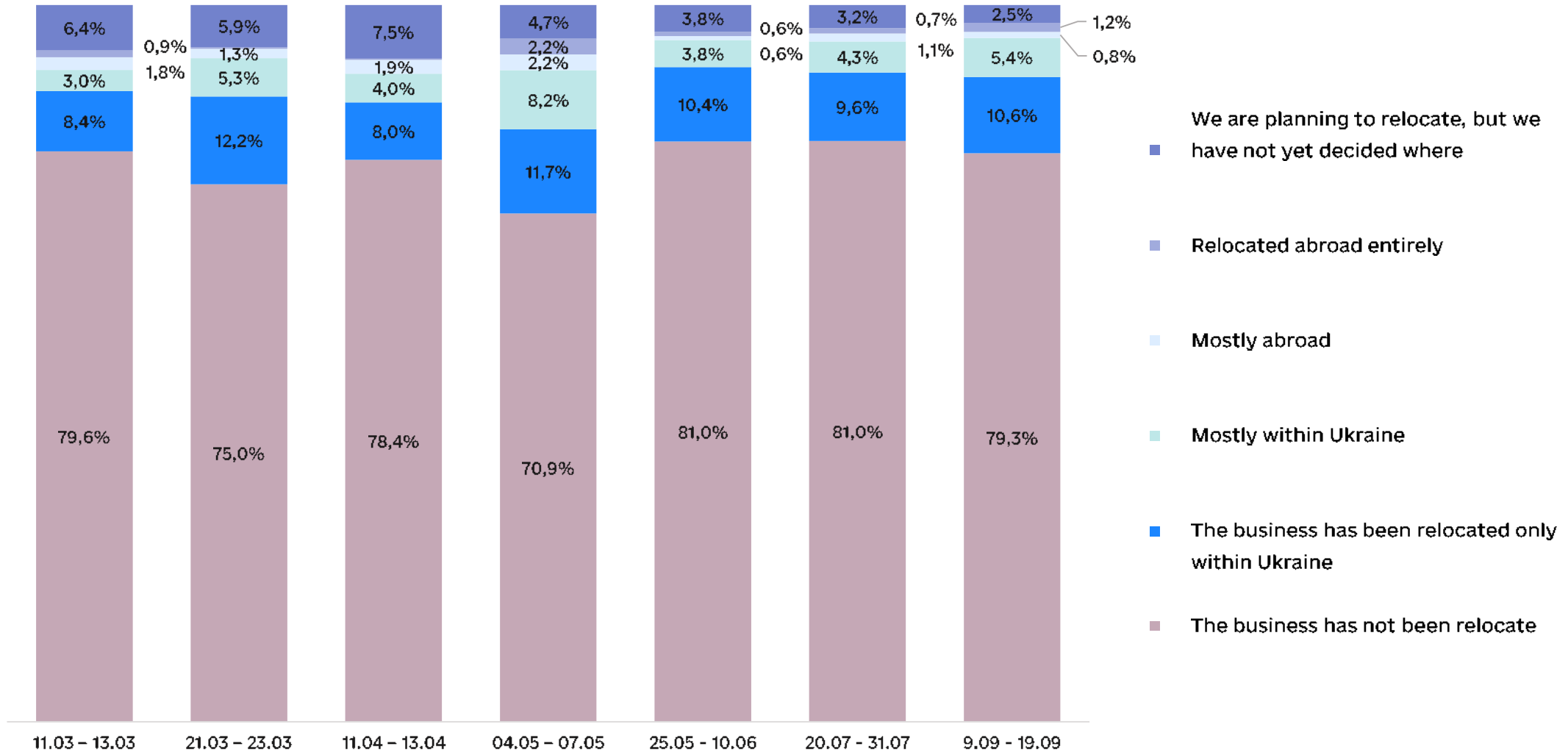
The state of businesses compared to the period before 24.02.2022 (year of the business establishment)



The state of businesses compared to the period before 24.02.2022 (by business size)

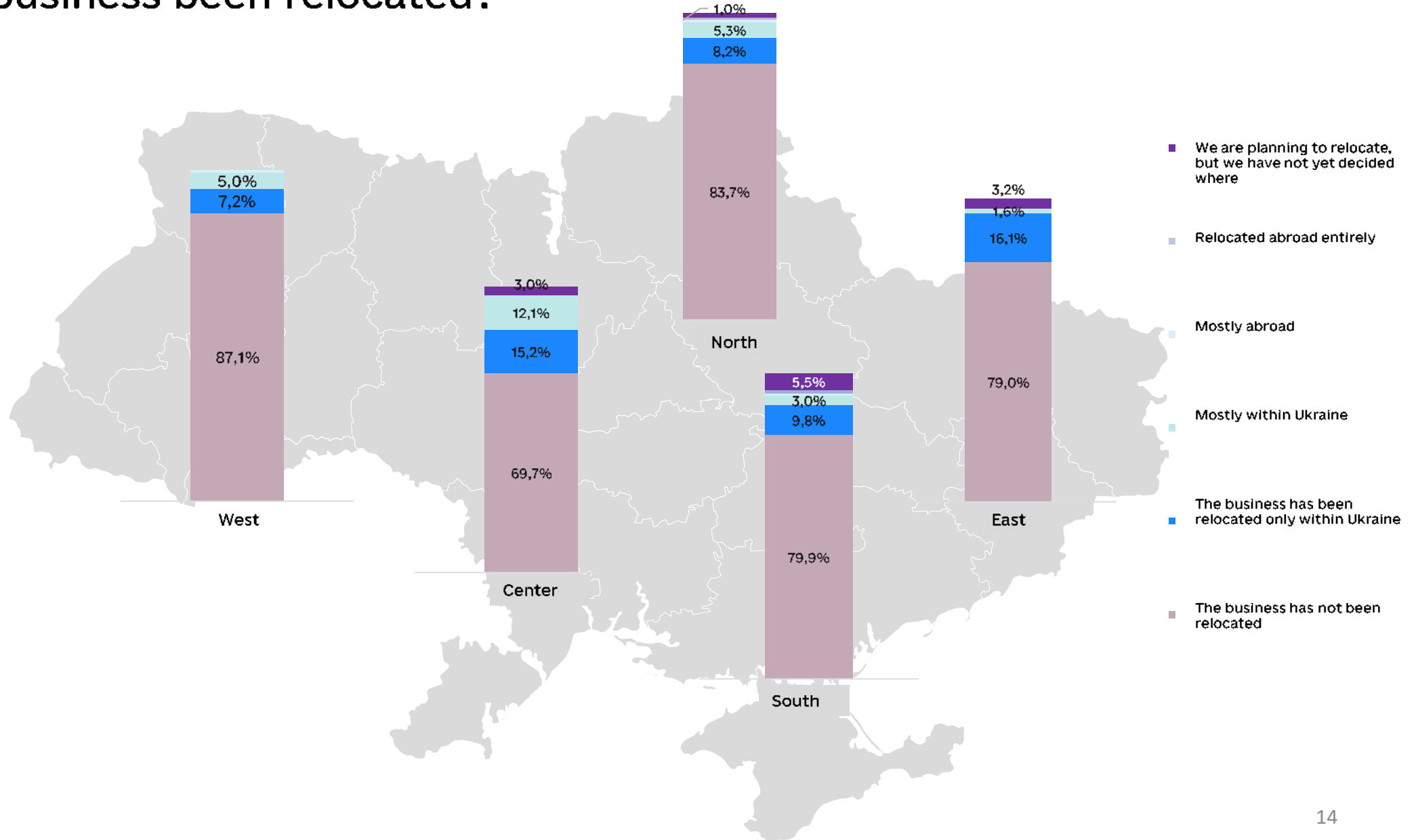


Has the business been relocated?

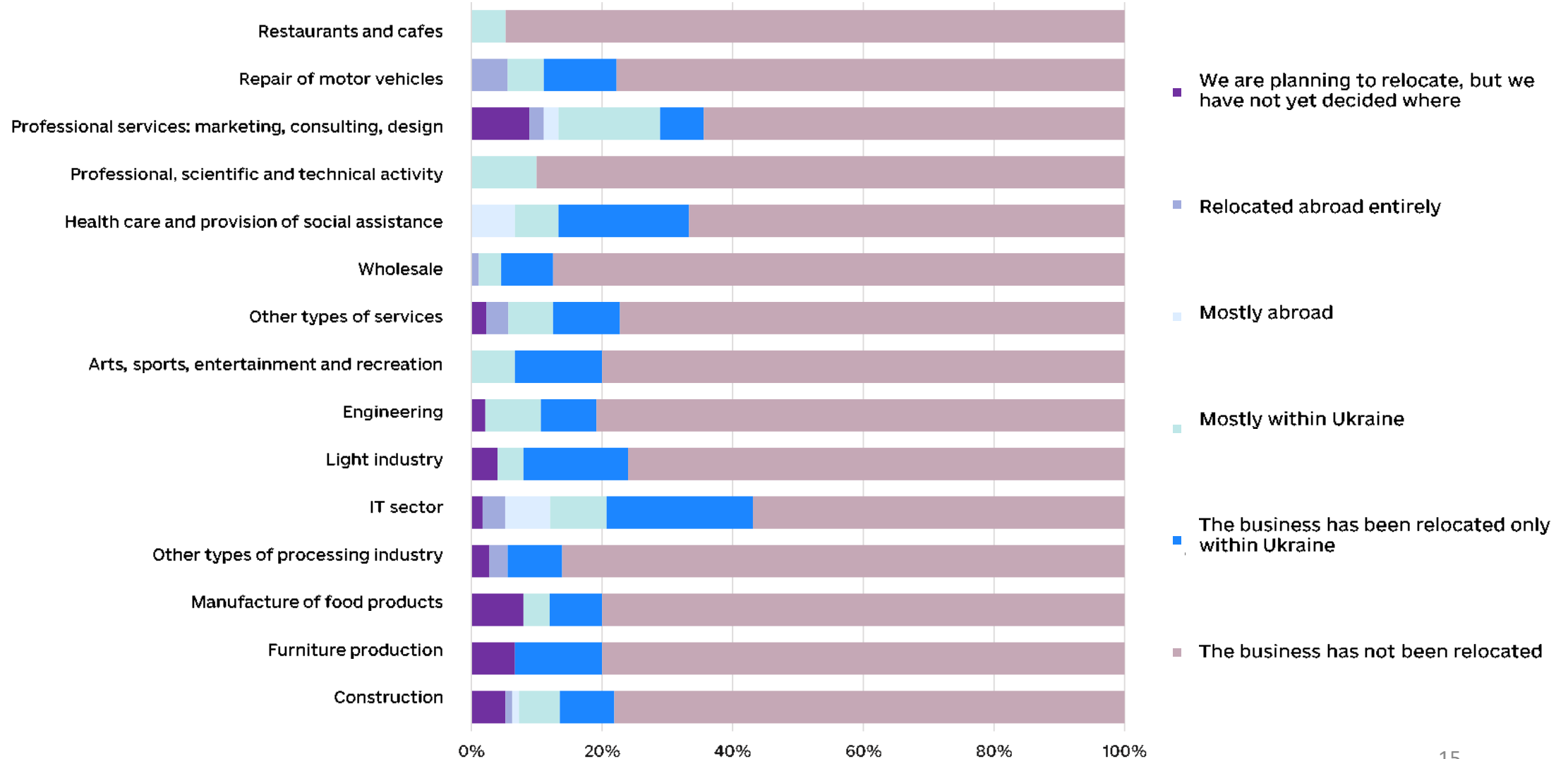


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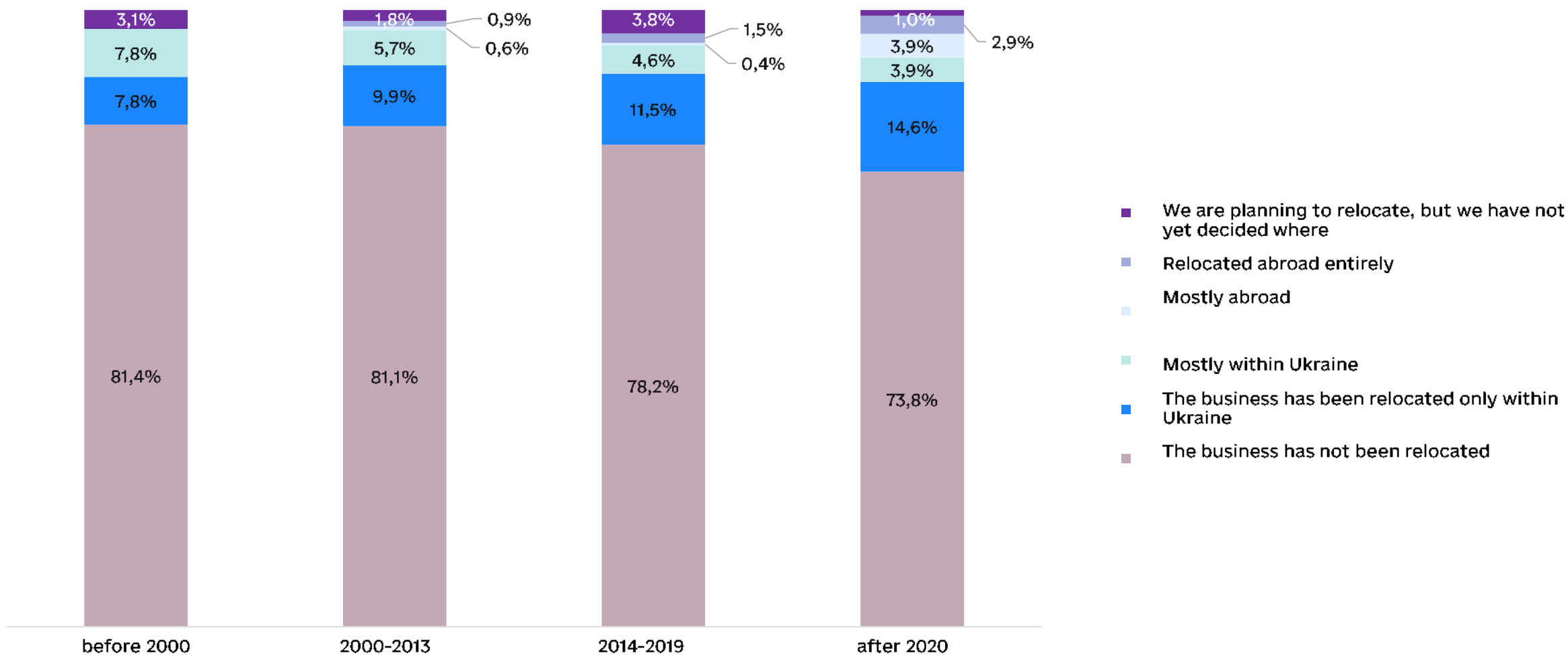
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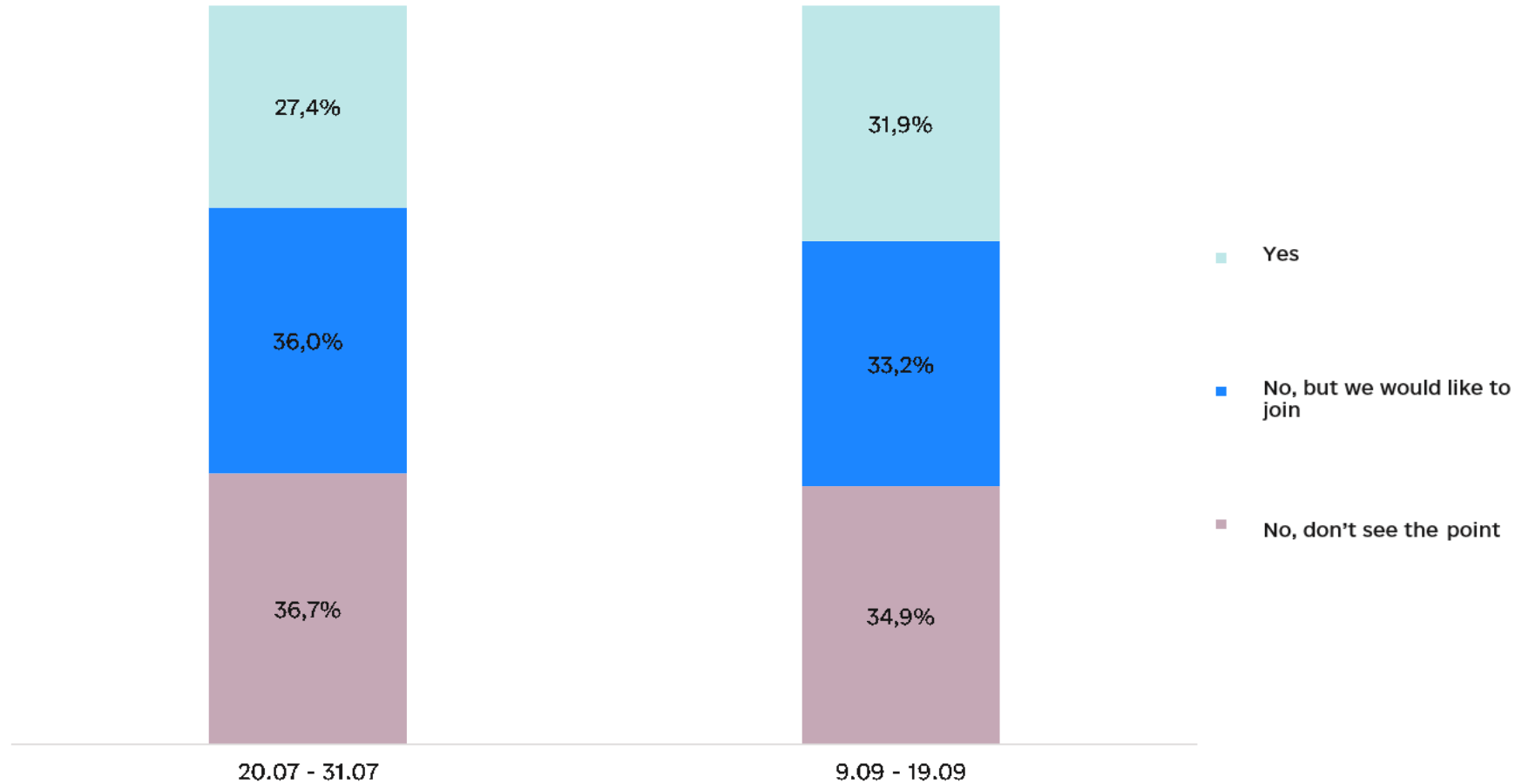
Has the business been relocated? (by industries)



Has the business been relocated?(year of the business establishment)

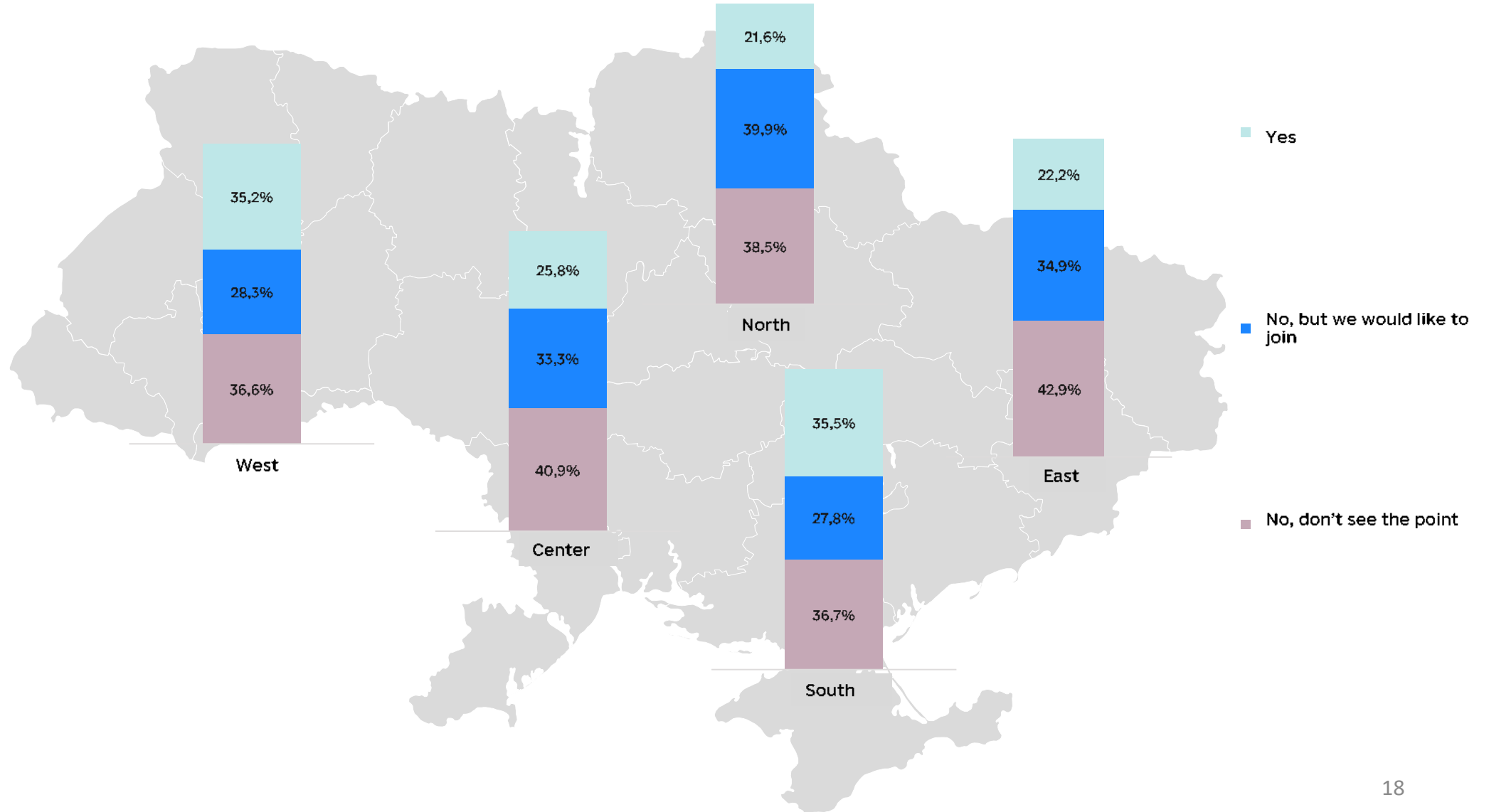


Are you personally or is your company a member of business associations or business clubs?

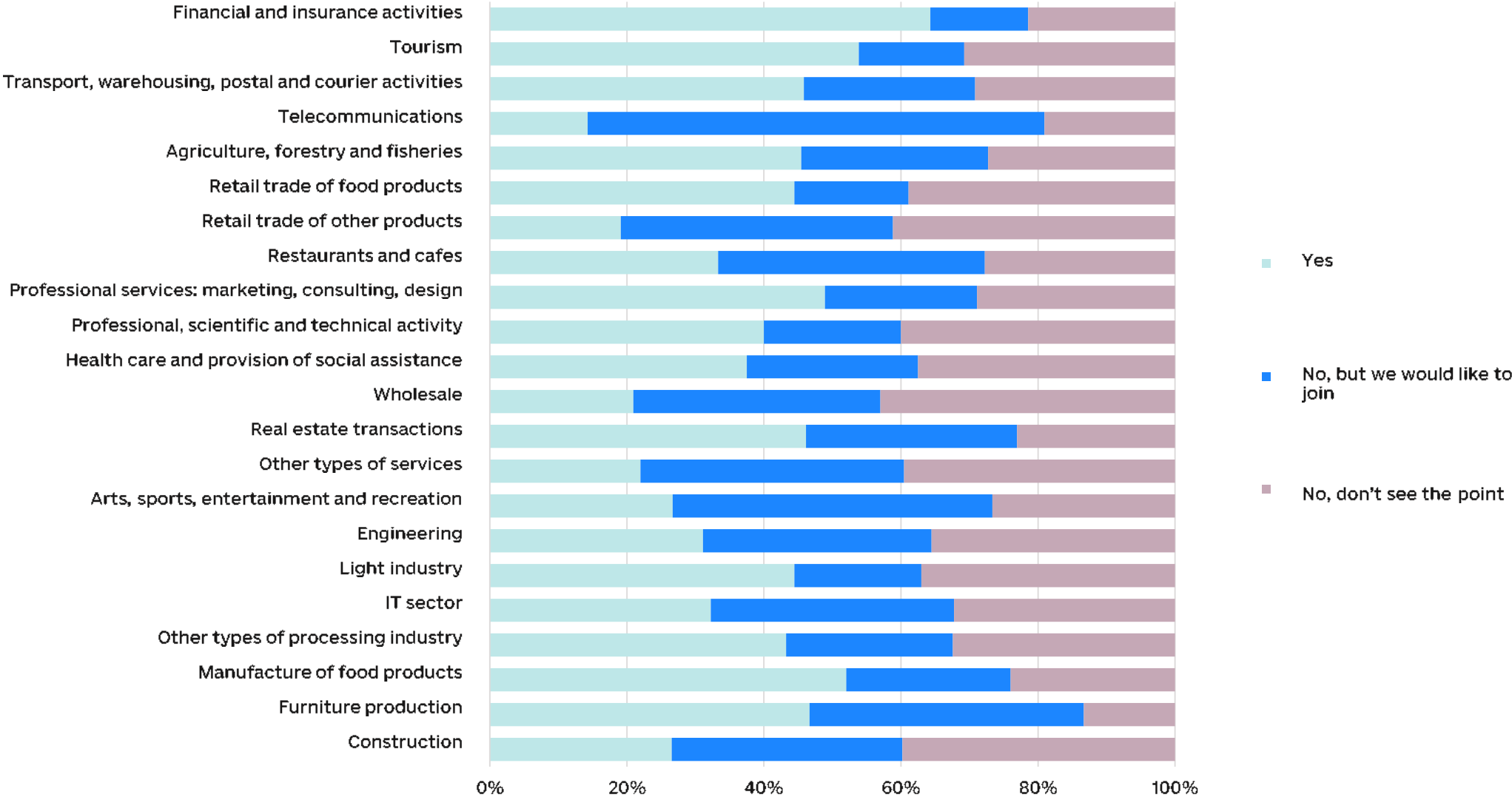


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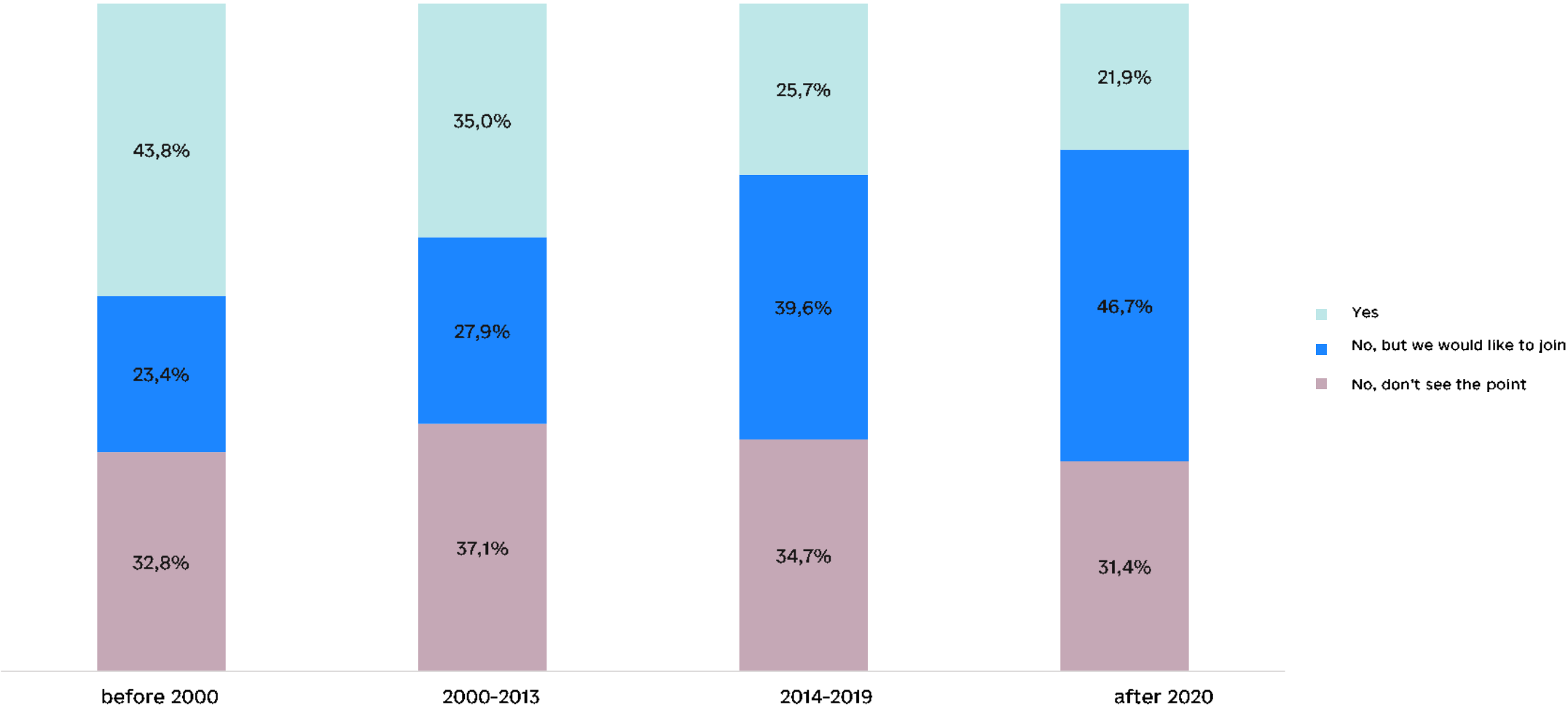
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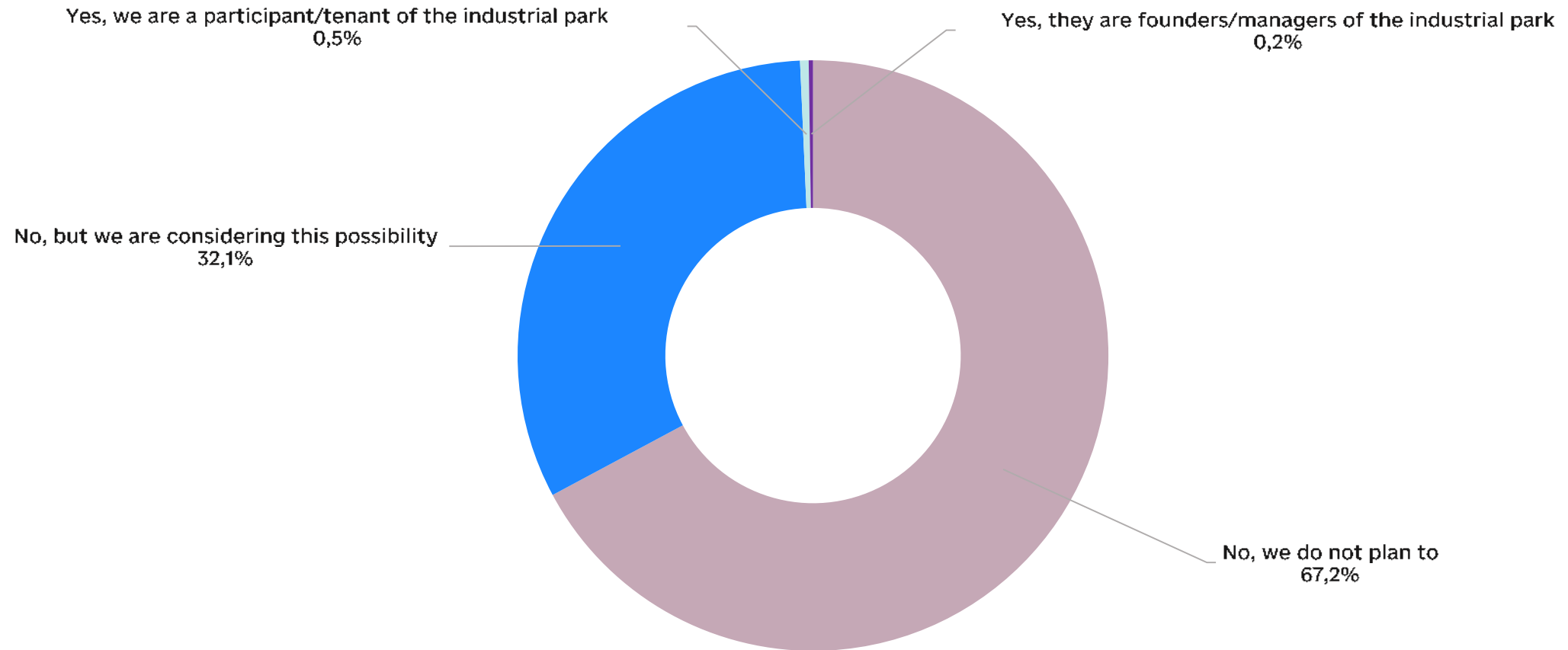
Are you personally or is your company a member of business associations or business clubs? (by industries)



Are you personally or is your company a member of business associations or business clubs? (year of the business establishment)

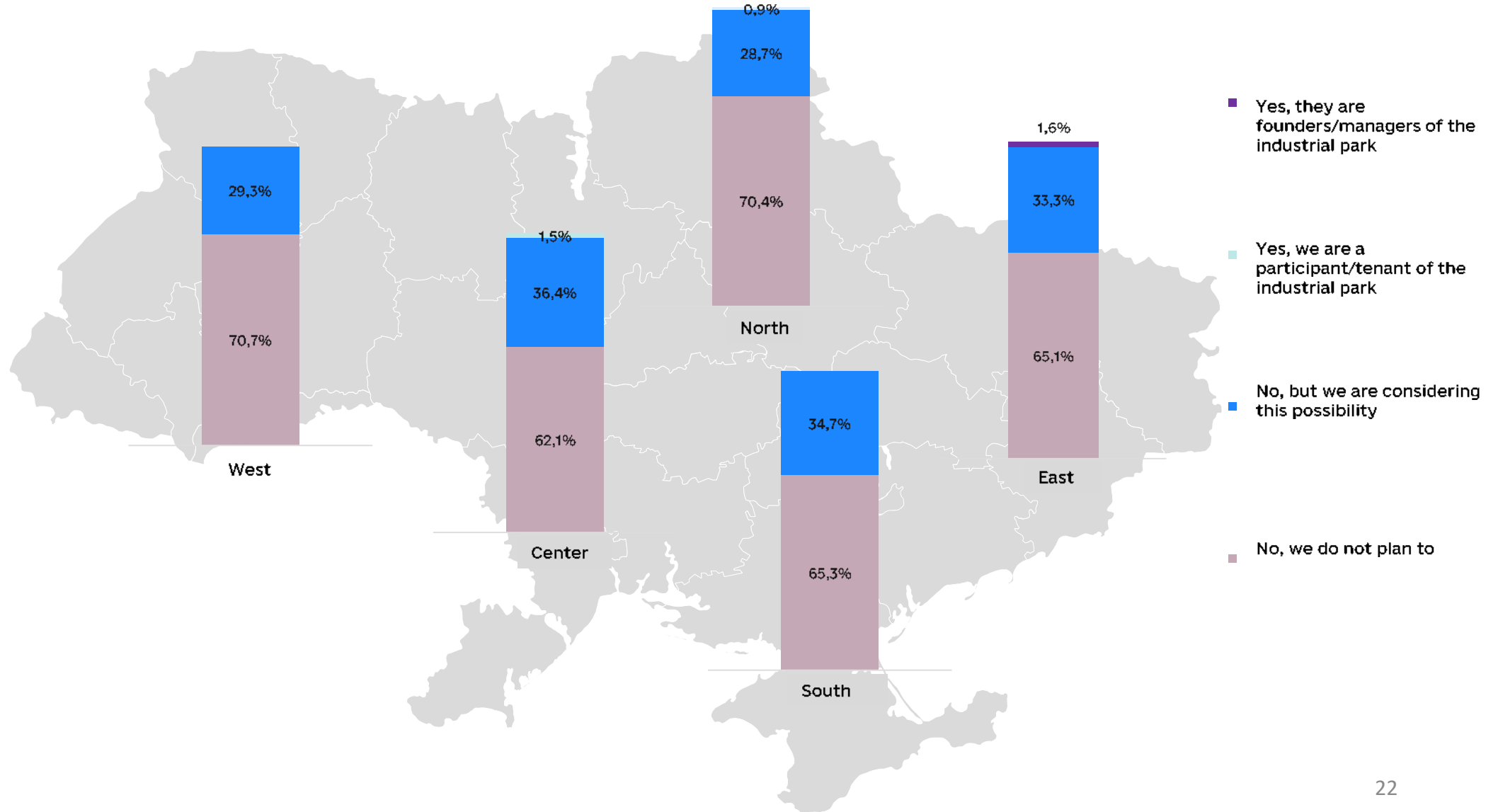


Is your company a member of the industrial park?

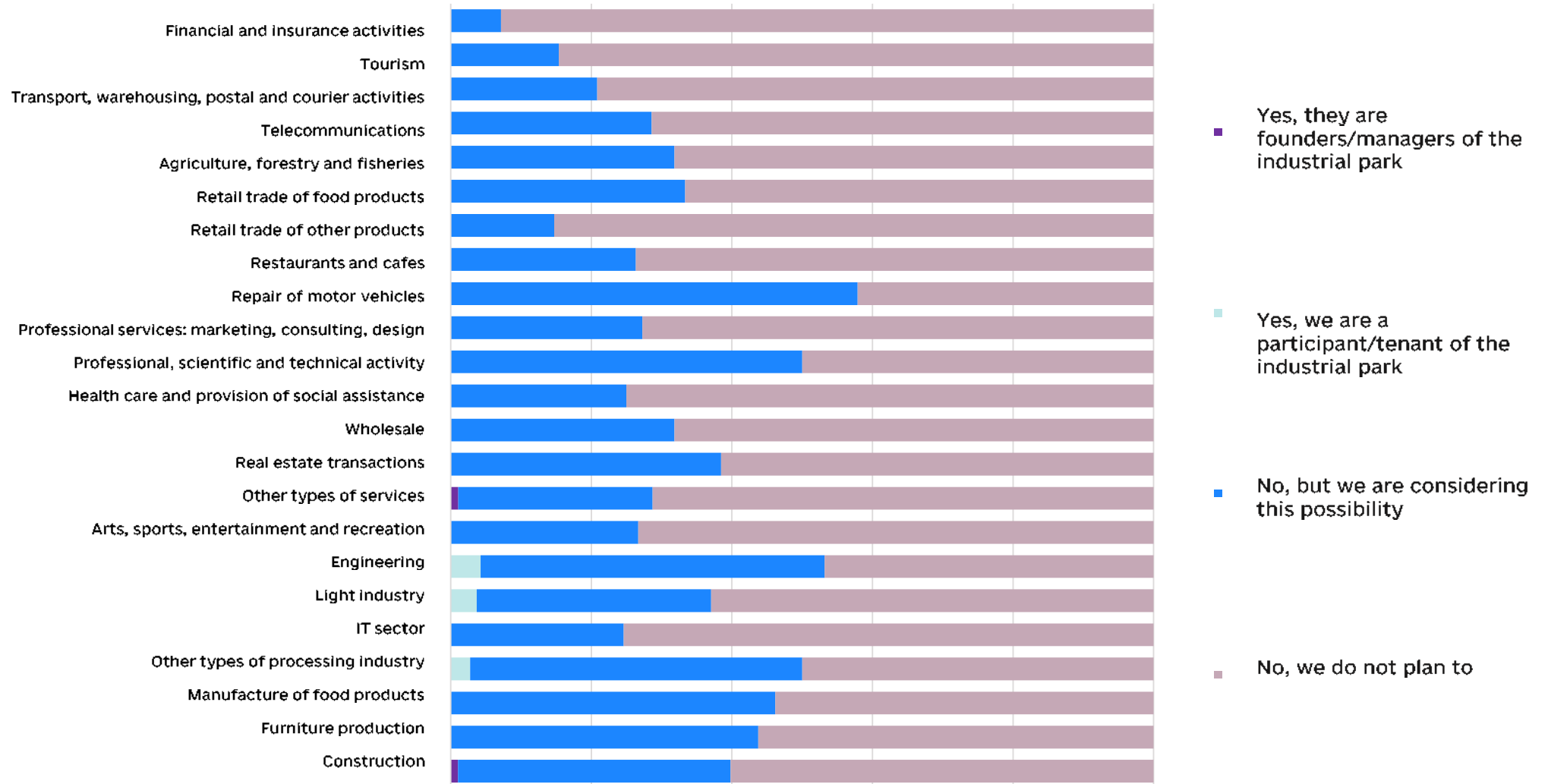


Is your company a member of the industrial park?

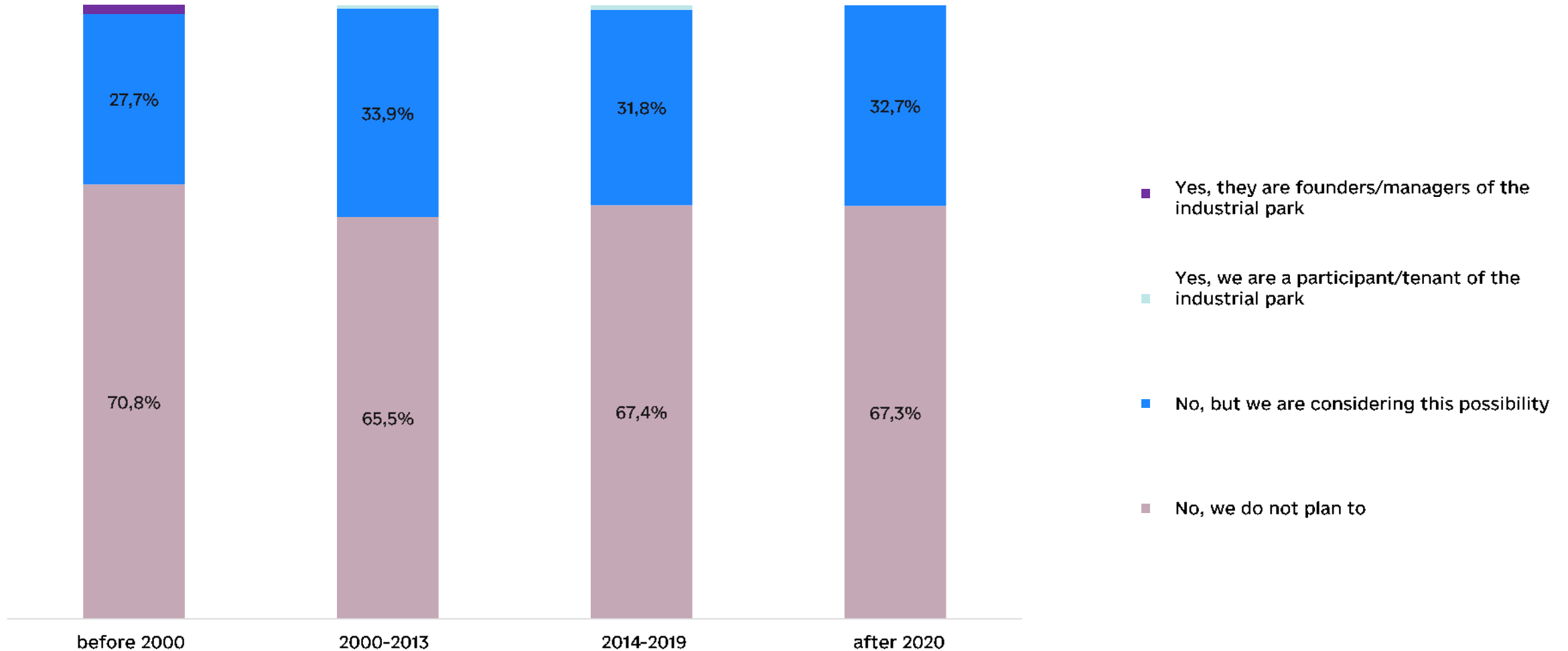
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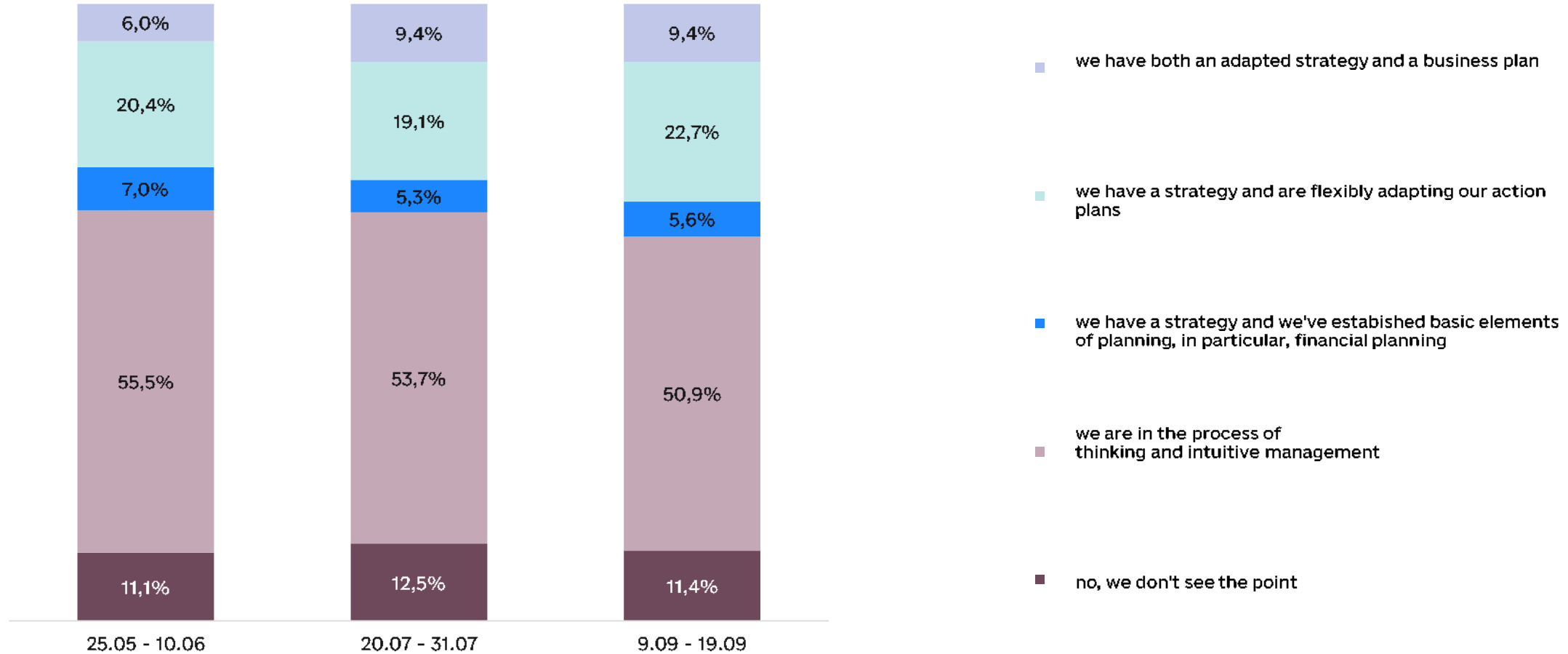
Is your company a member of the industrial park? (by industry)



Is your company a member of the industrial park? (year of business establishment)

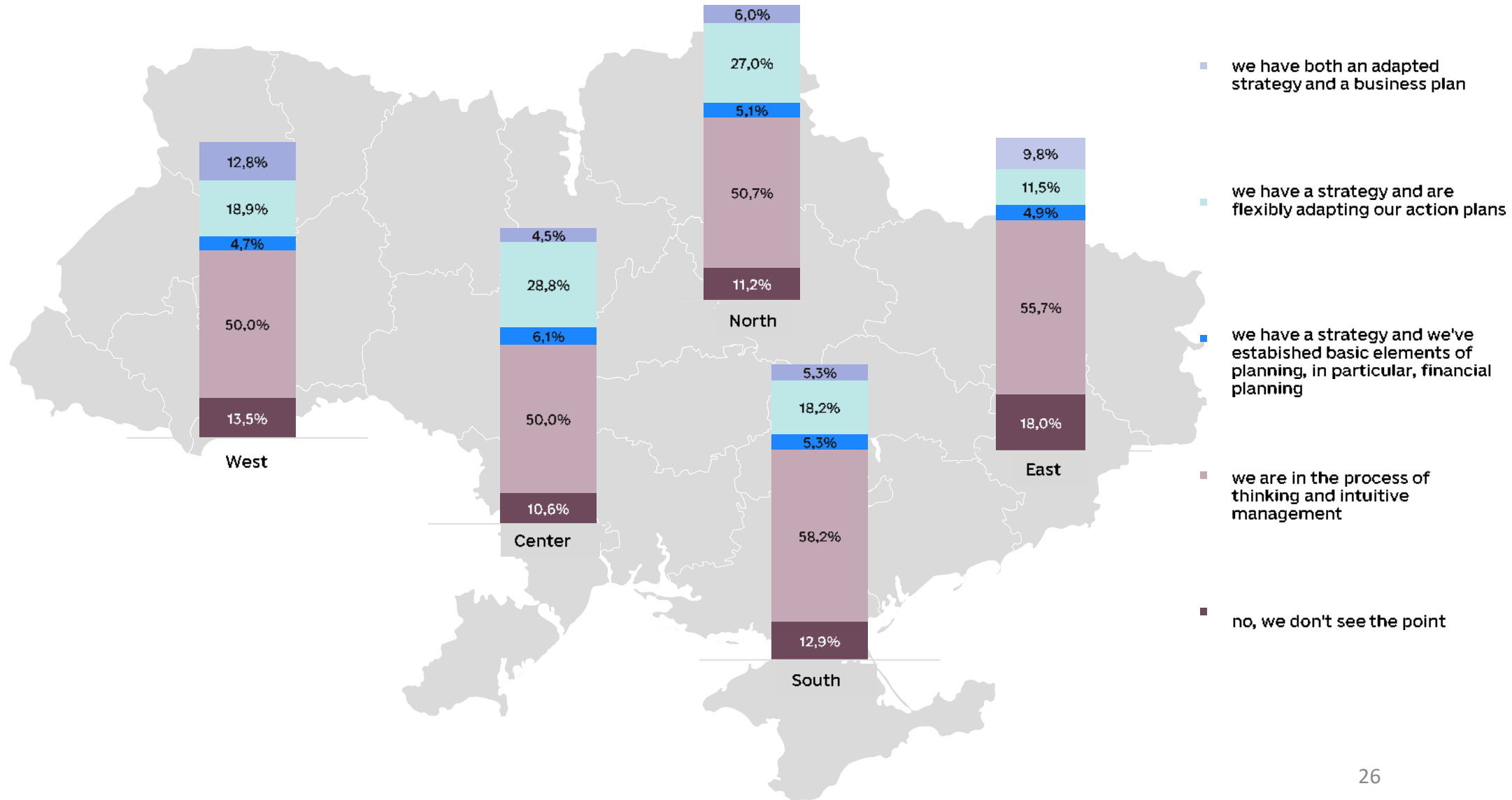


Does the business have a strategy, a business development plan considering the new reality?

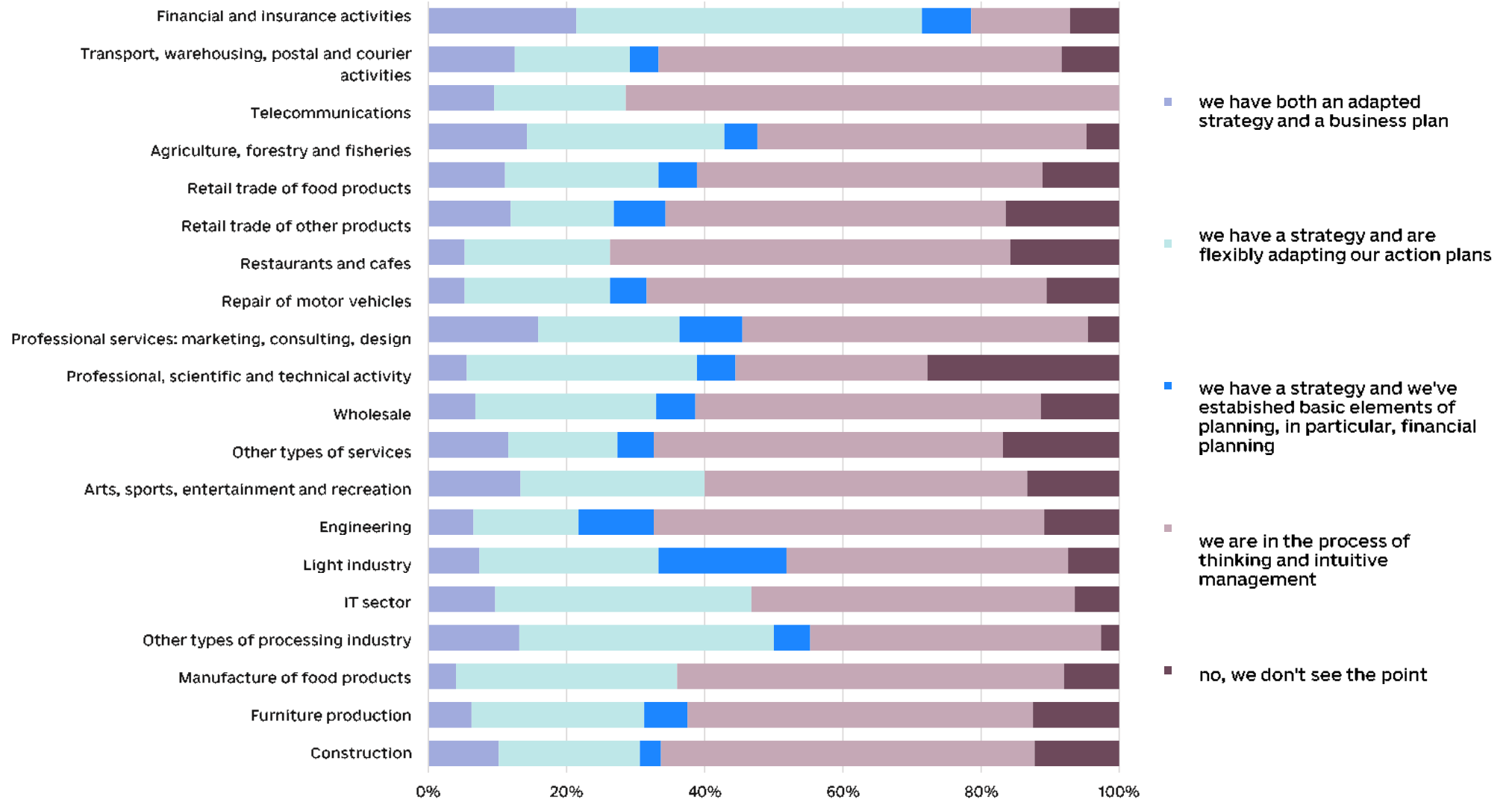


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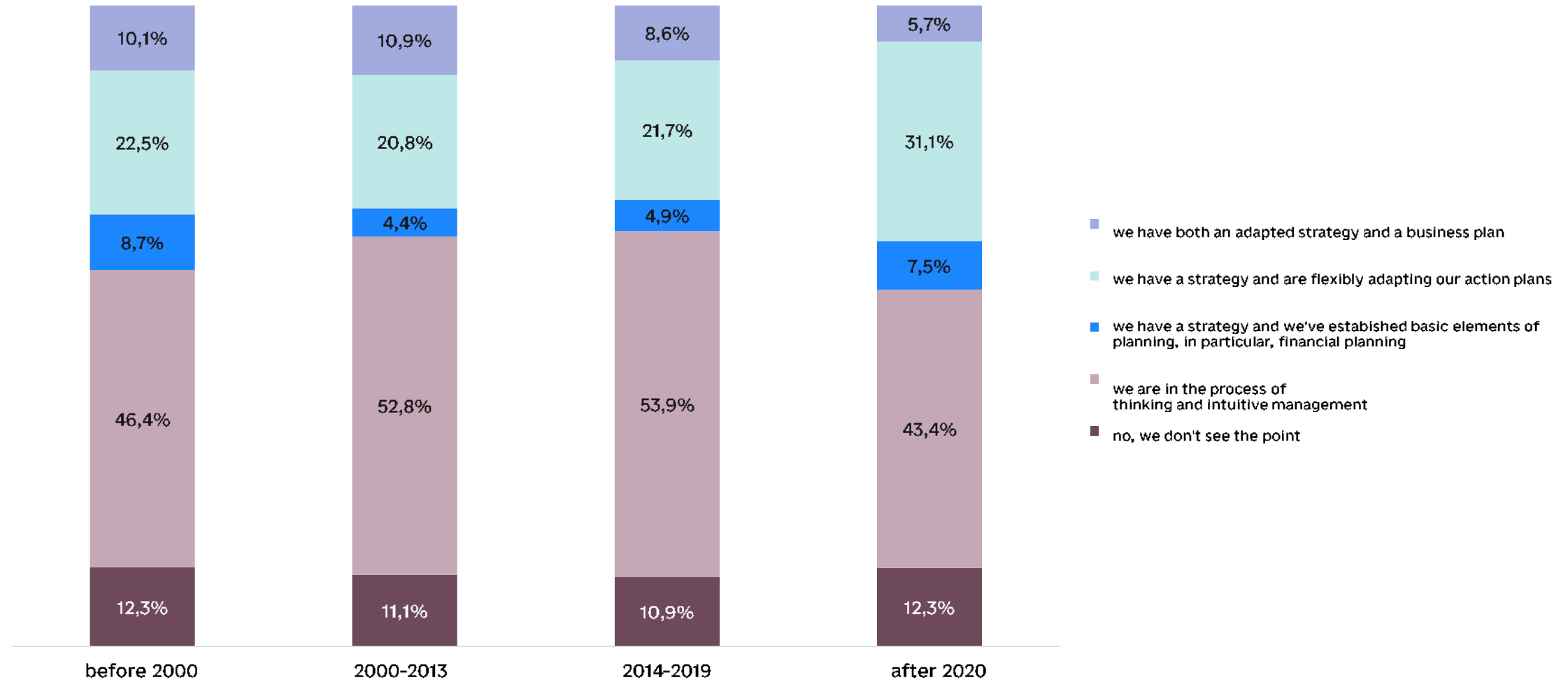
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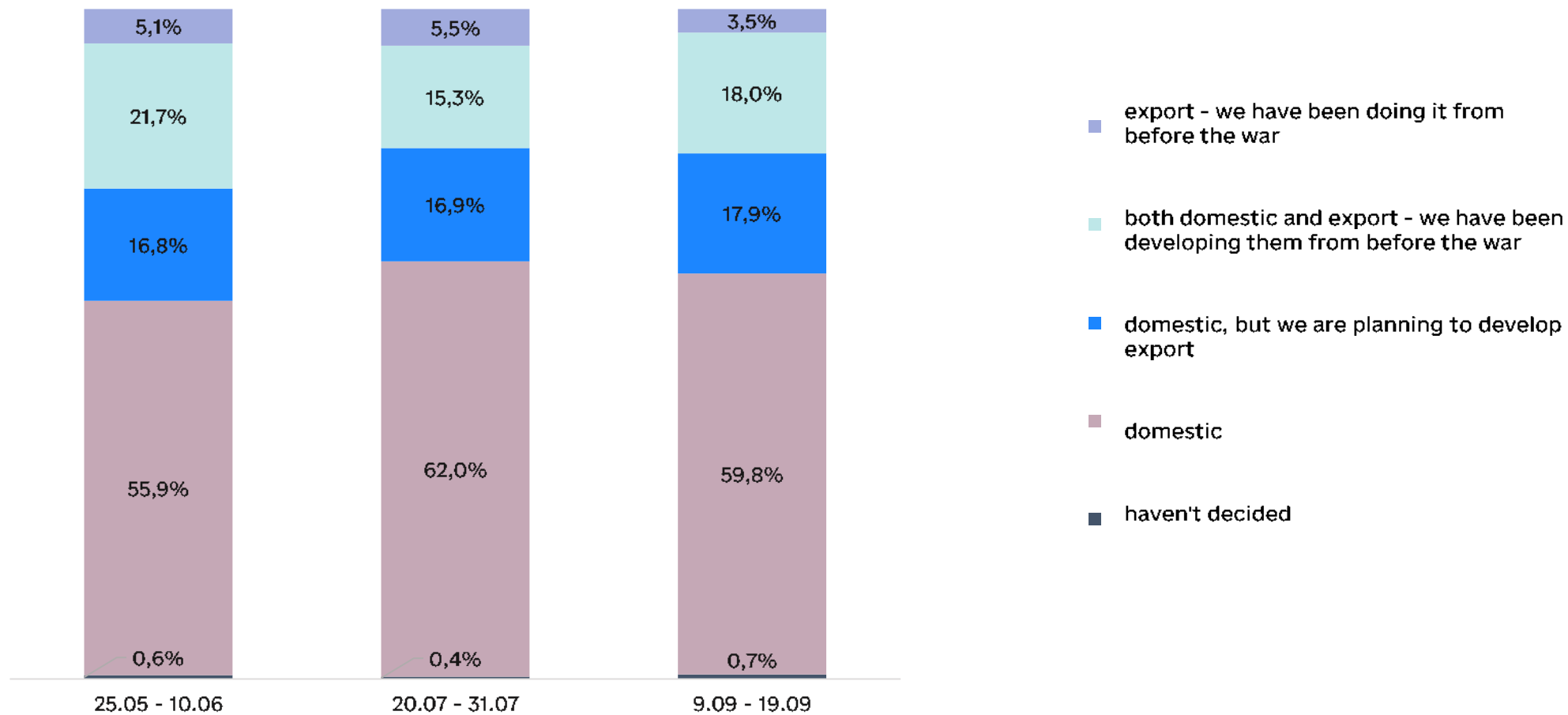
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Does the business have a strategy, a business development plan considering the new reality? (year of business establishment)

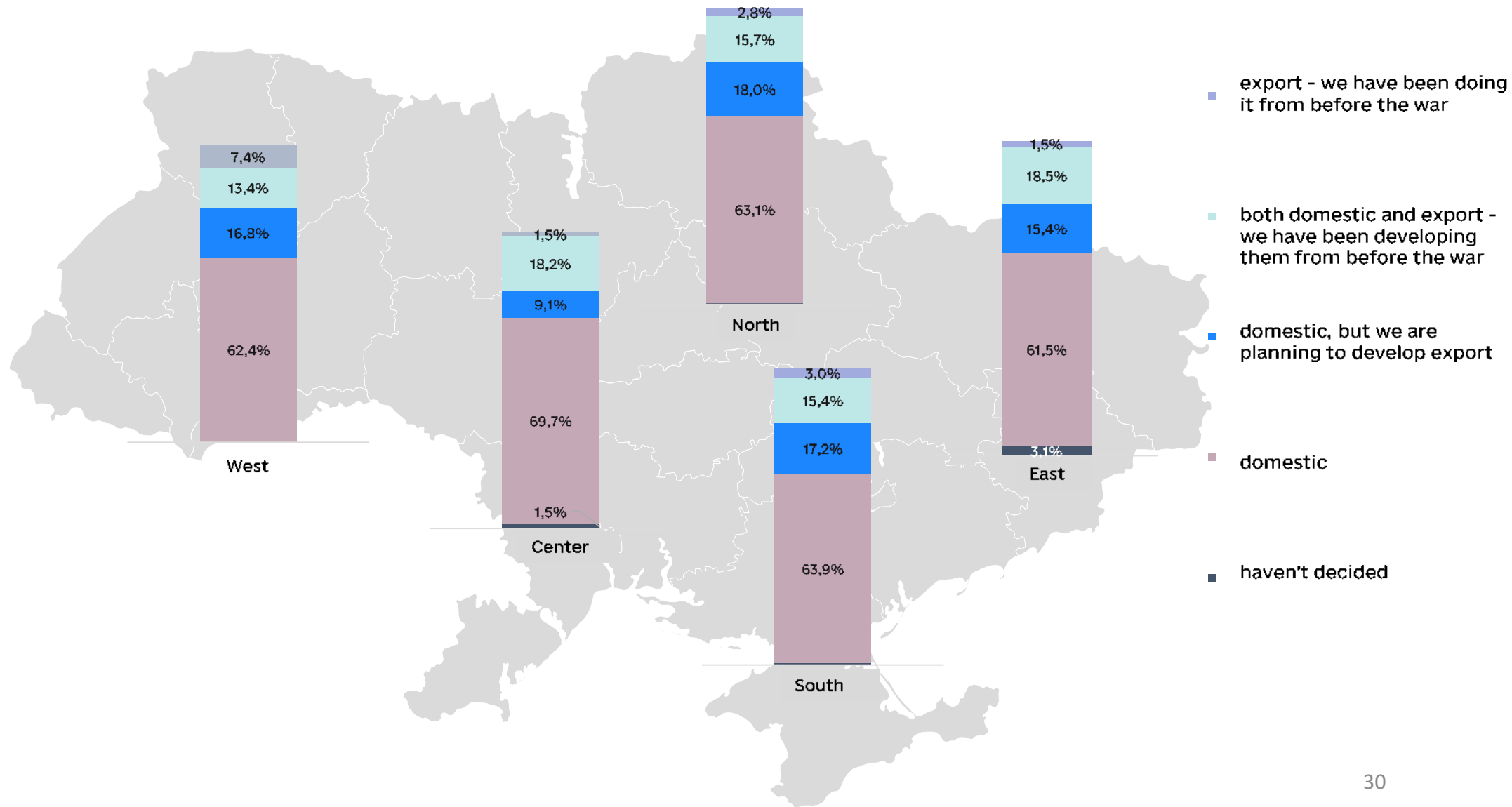


Focus on the domestic market or export?

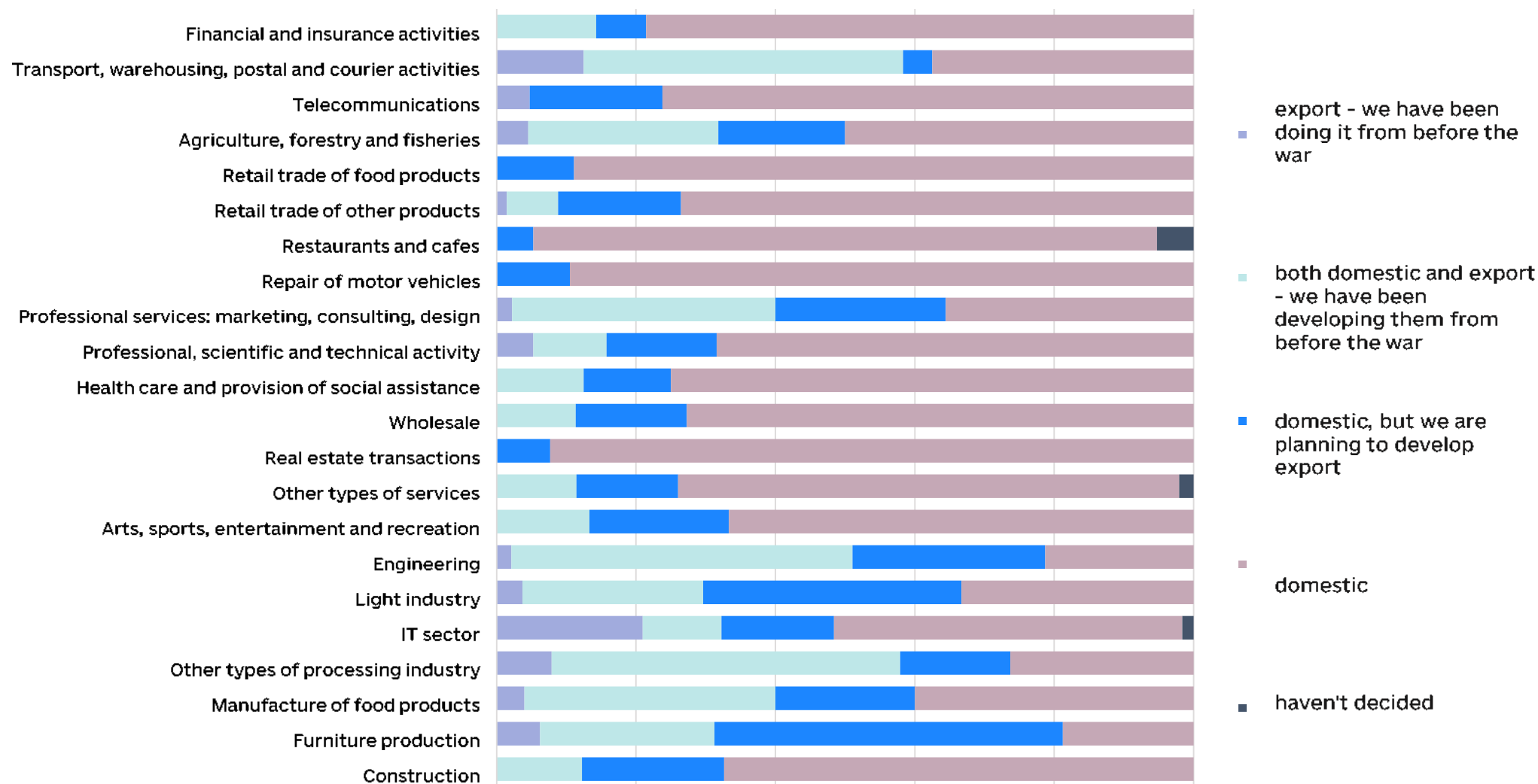


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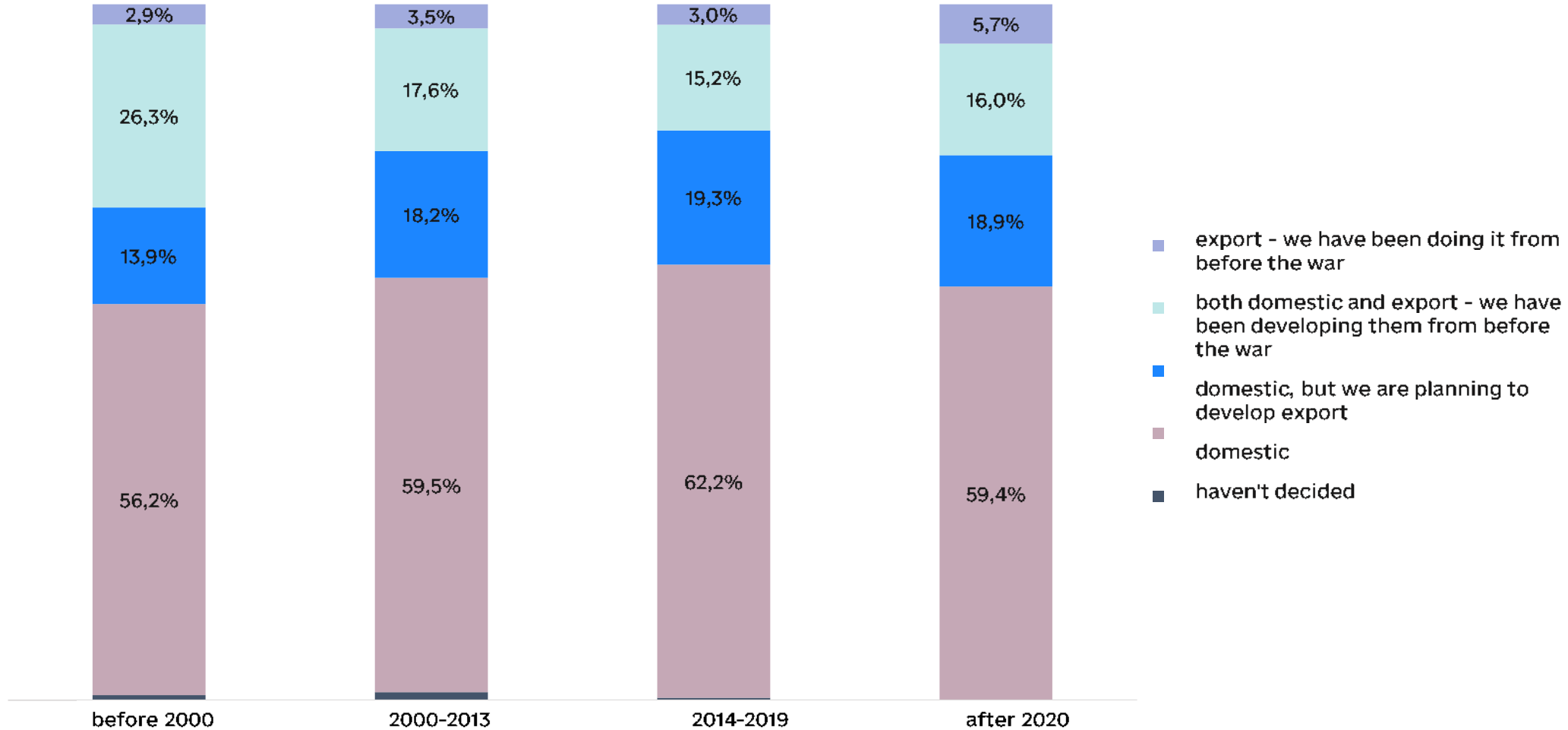
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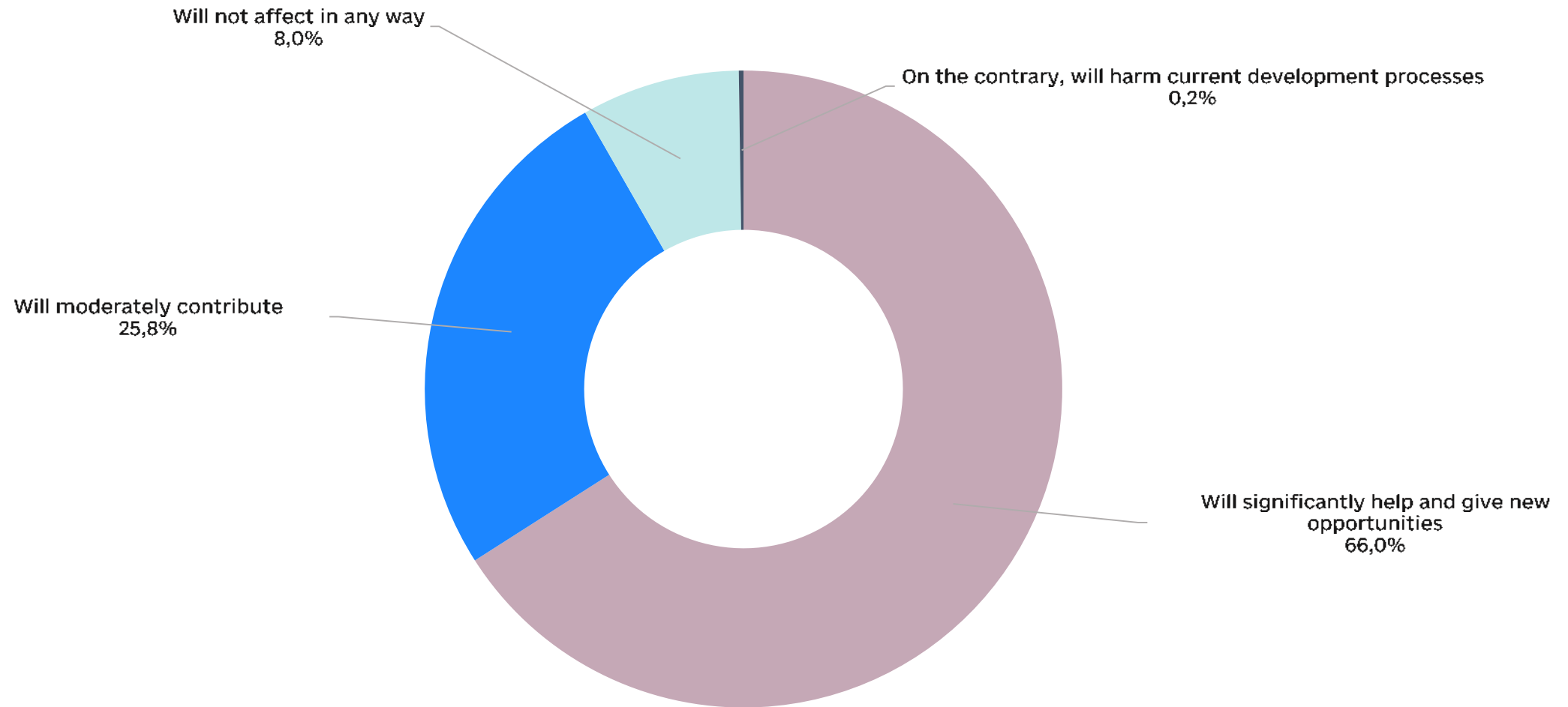
Focus on the domestic market or export? (by industry)



Focus on the domestic market or export? (year of business establishment)

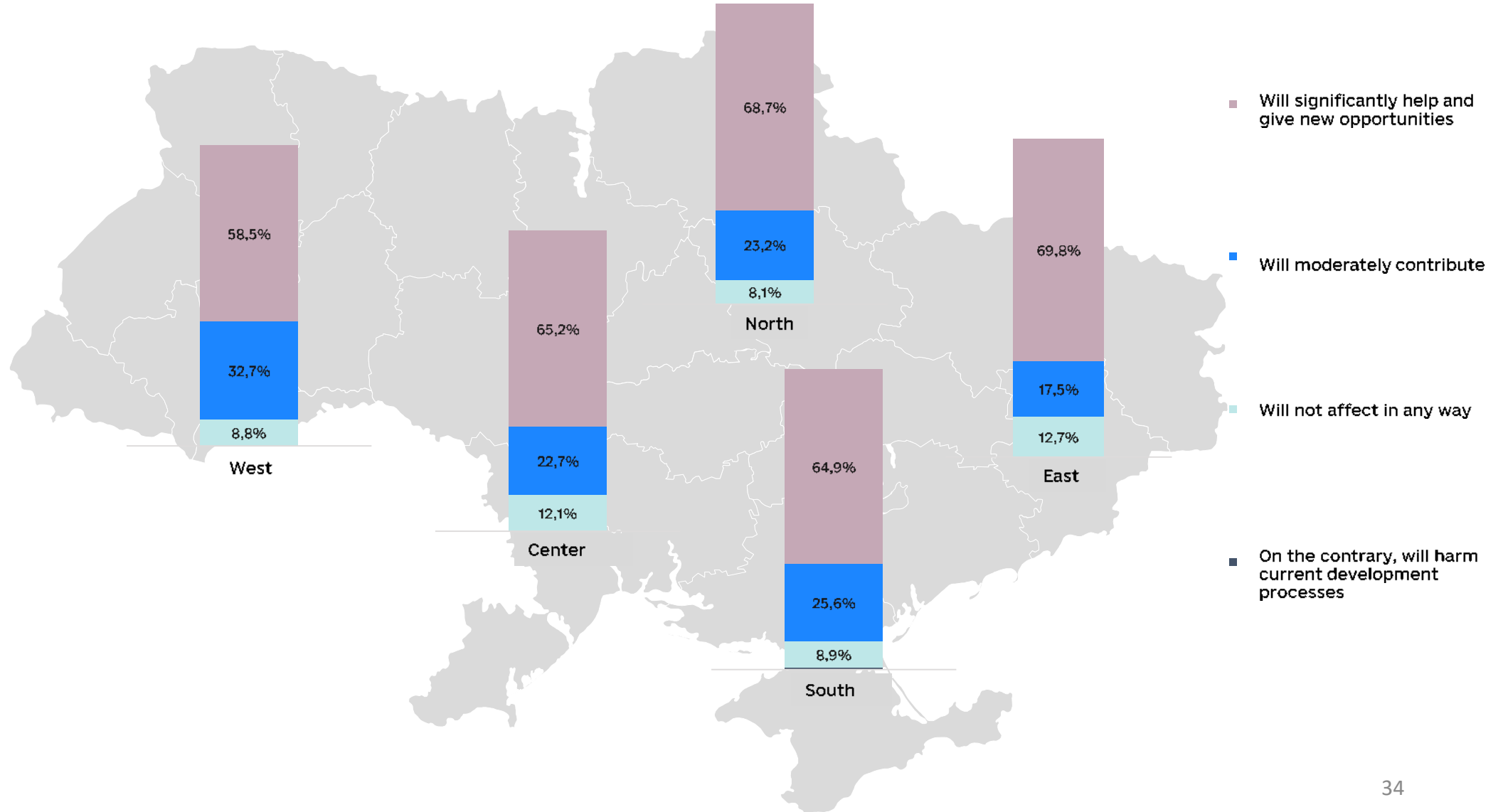


How do you think the launch of a transparent mechanism for the country's recovery will contribute to the development of your business?

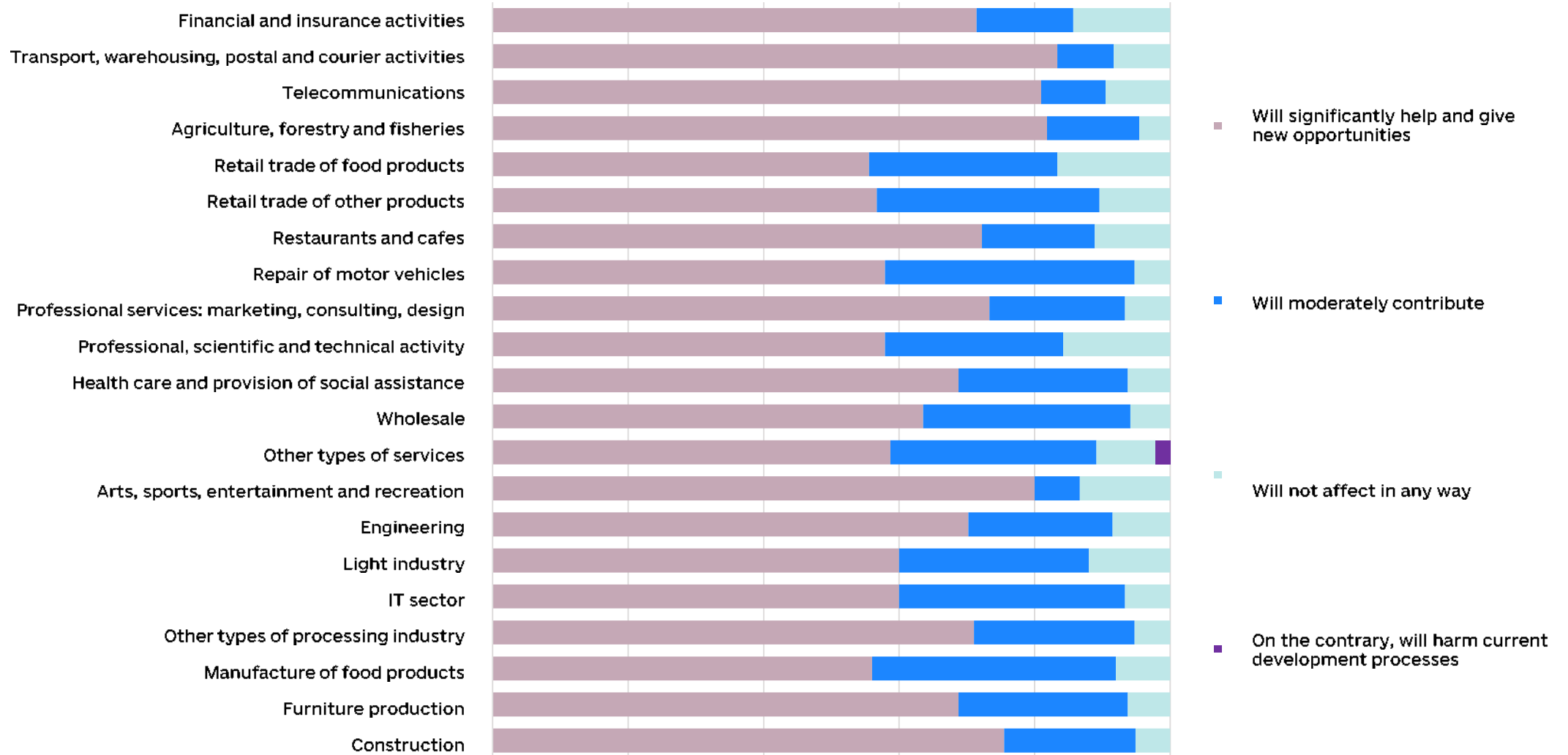


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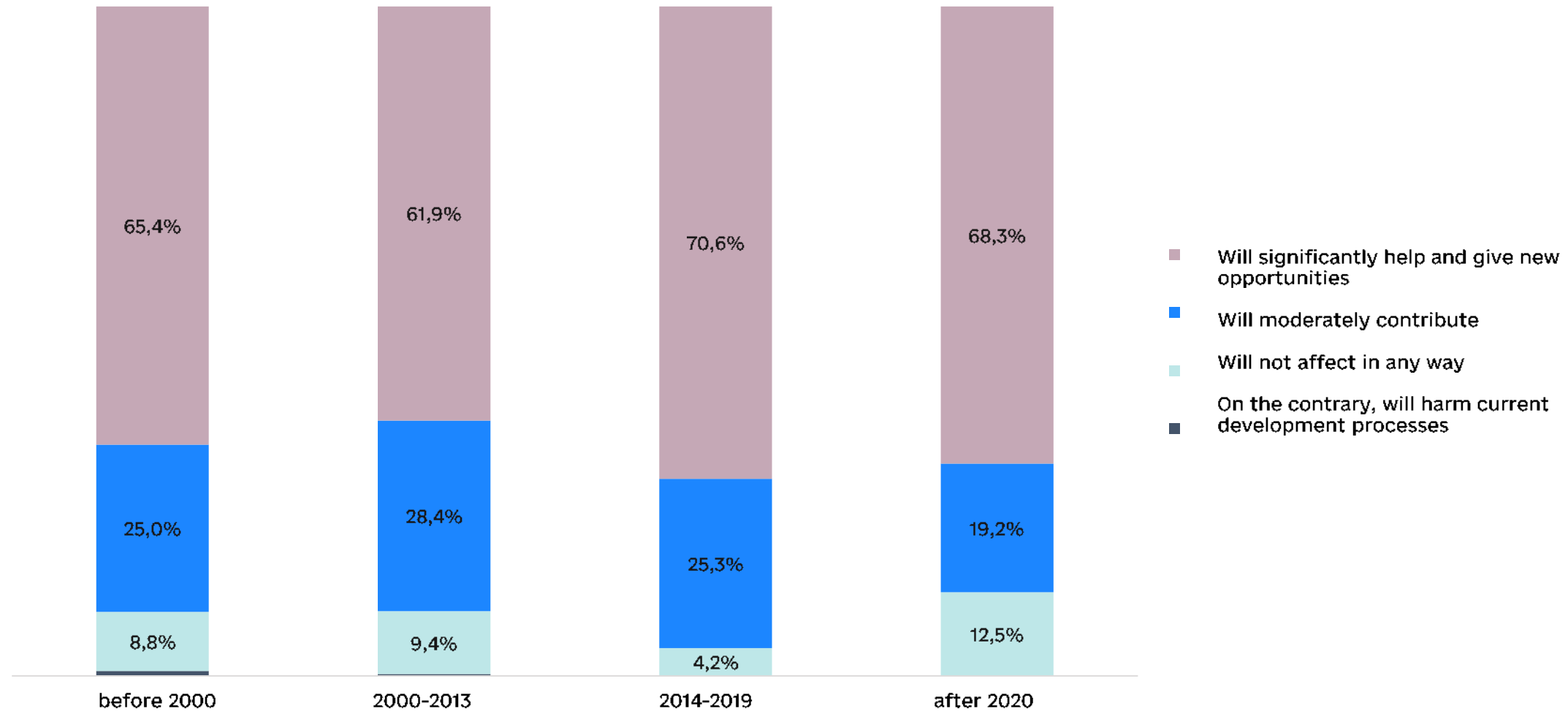
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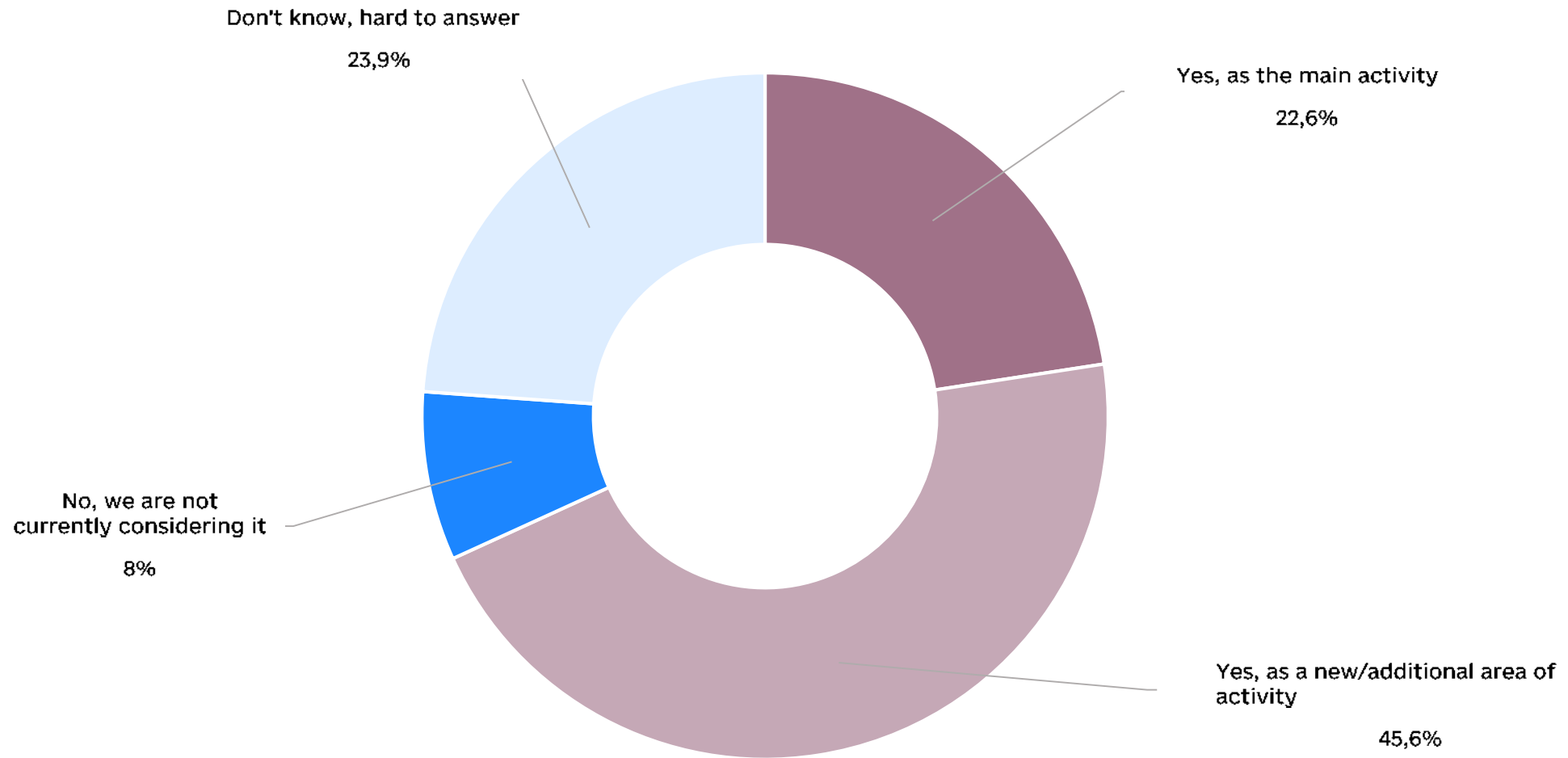
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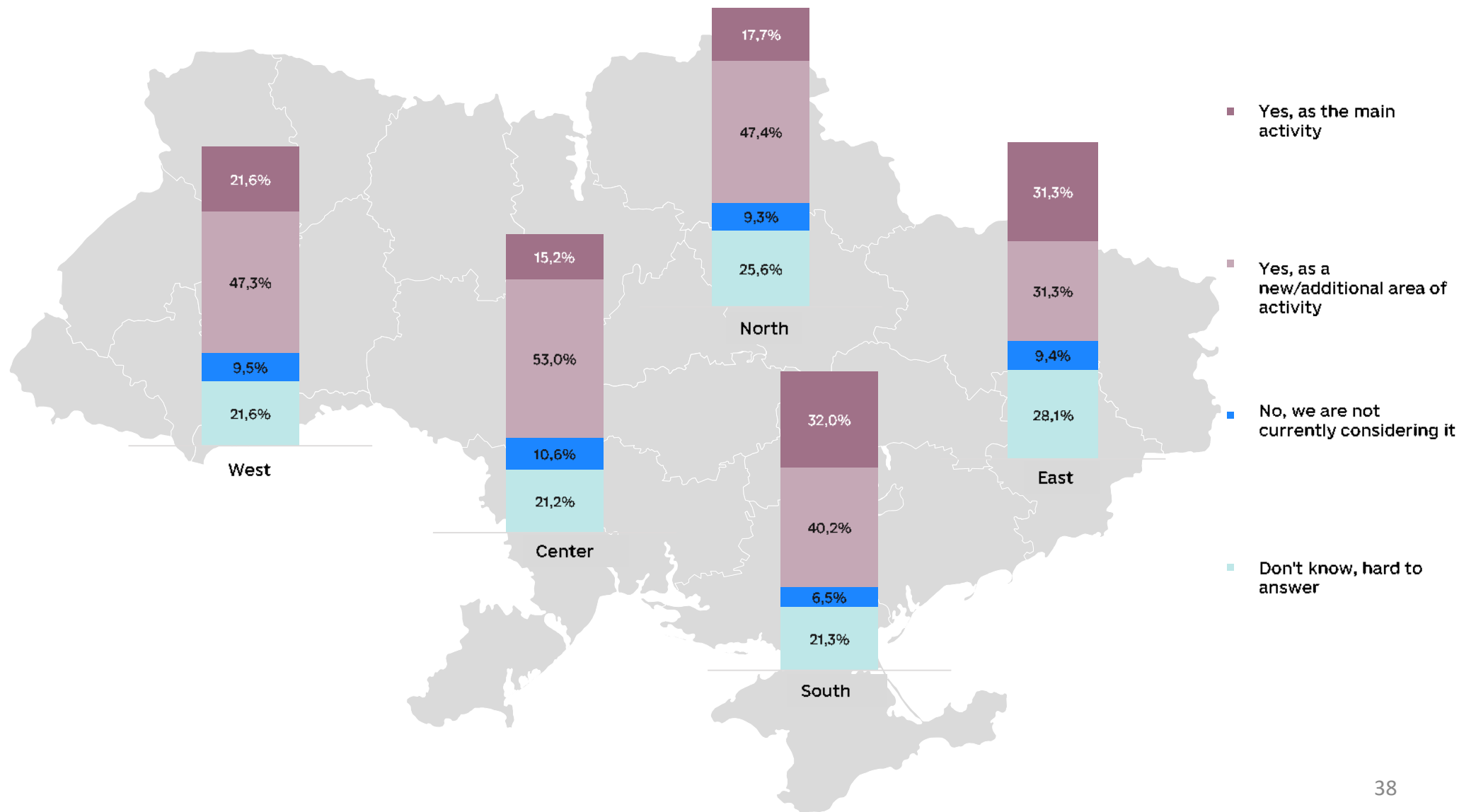


Do you consider the possibility of involvement in the reconstruction of the country?

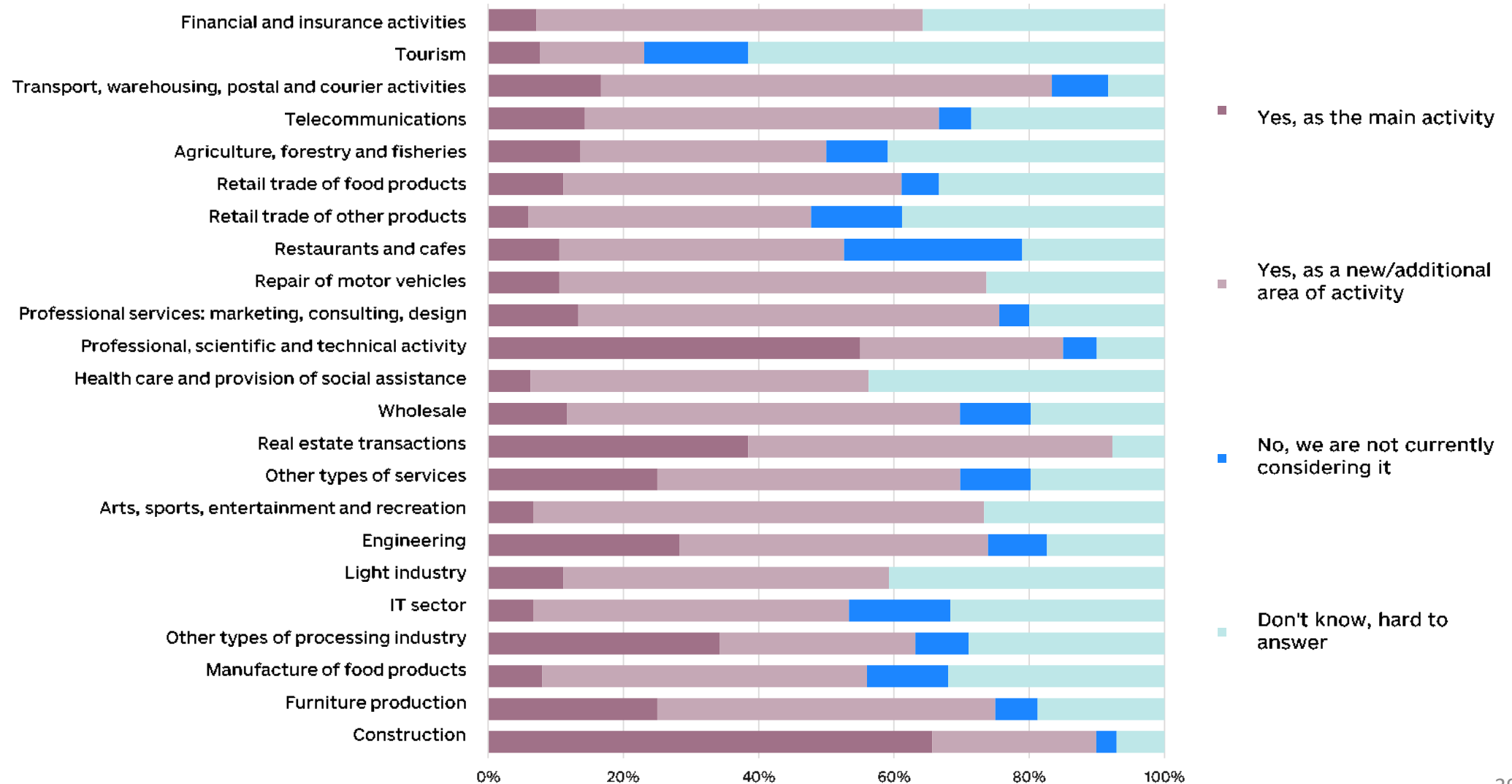


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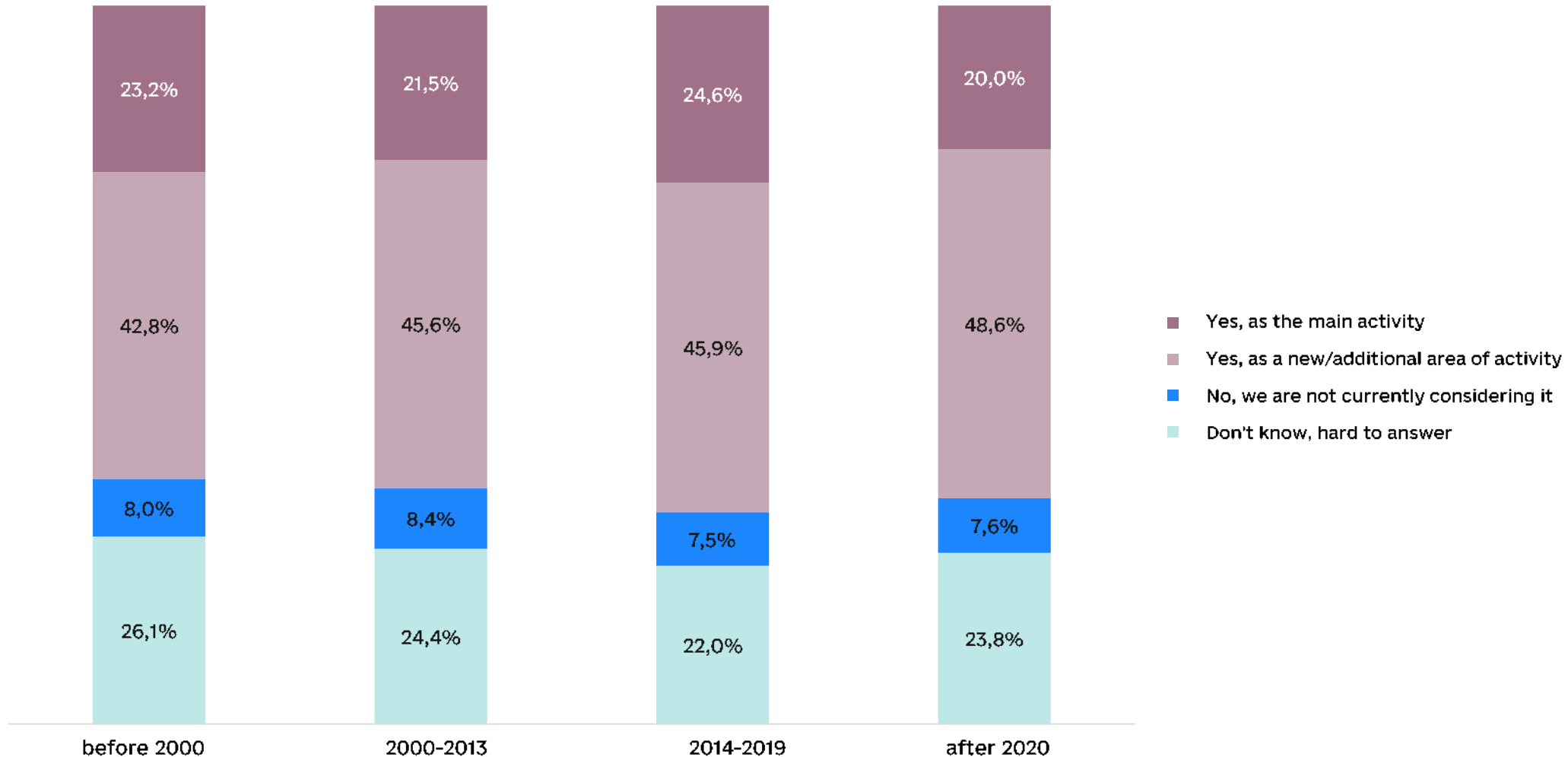
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Do you consider the possibility of involvement in the reconstruction of the country? (by industry)



Do you consider the possibility of involvement in the reconstruction of the country? (year of business establishment)



Personnel situation

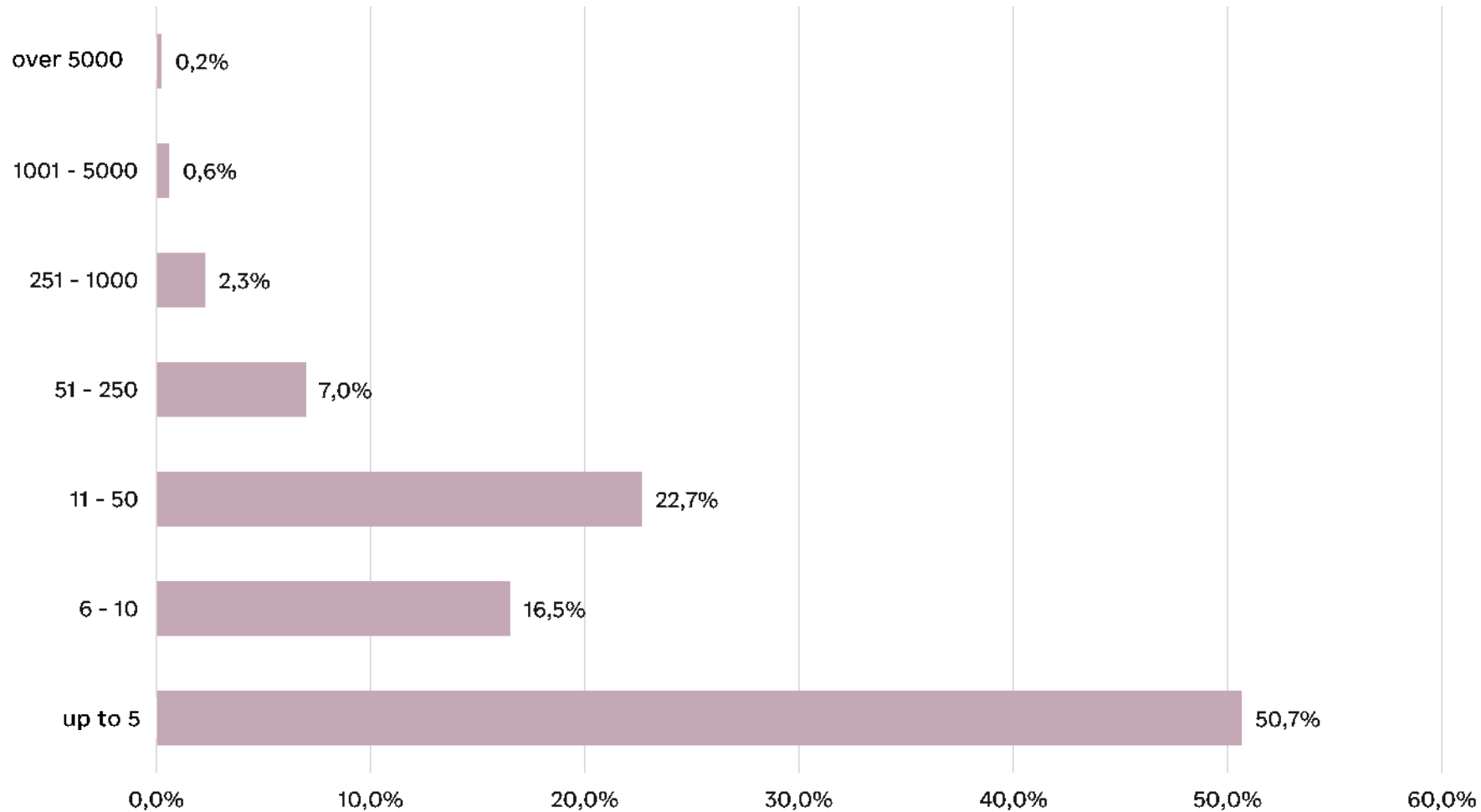
Personnel situation

	10.06	31.07	19.09
The share of personnel working with pay cuts	27%	26%	22%
The share of personnel (in relation to 24.02) sent on vacation	20%	18%	18%
The share of personnel (in relation to 24.02) reduced at the moment	20%	24%	28% ↗

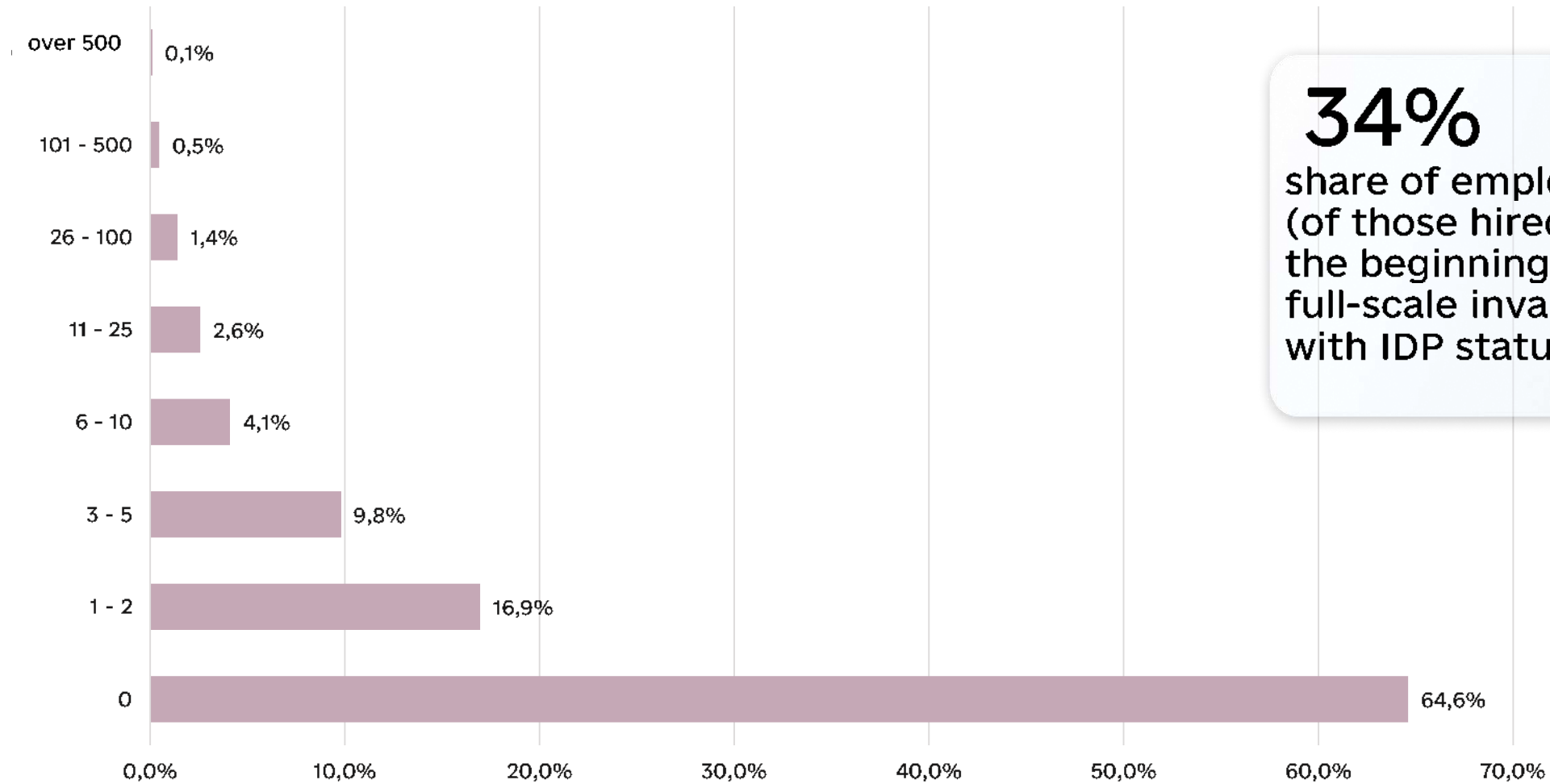
1 320 000

of SME
employees have
been reduced

How many employees are currently working in your business?



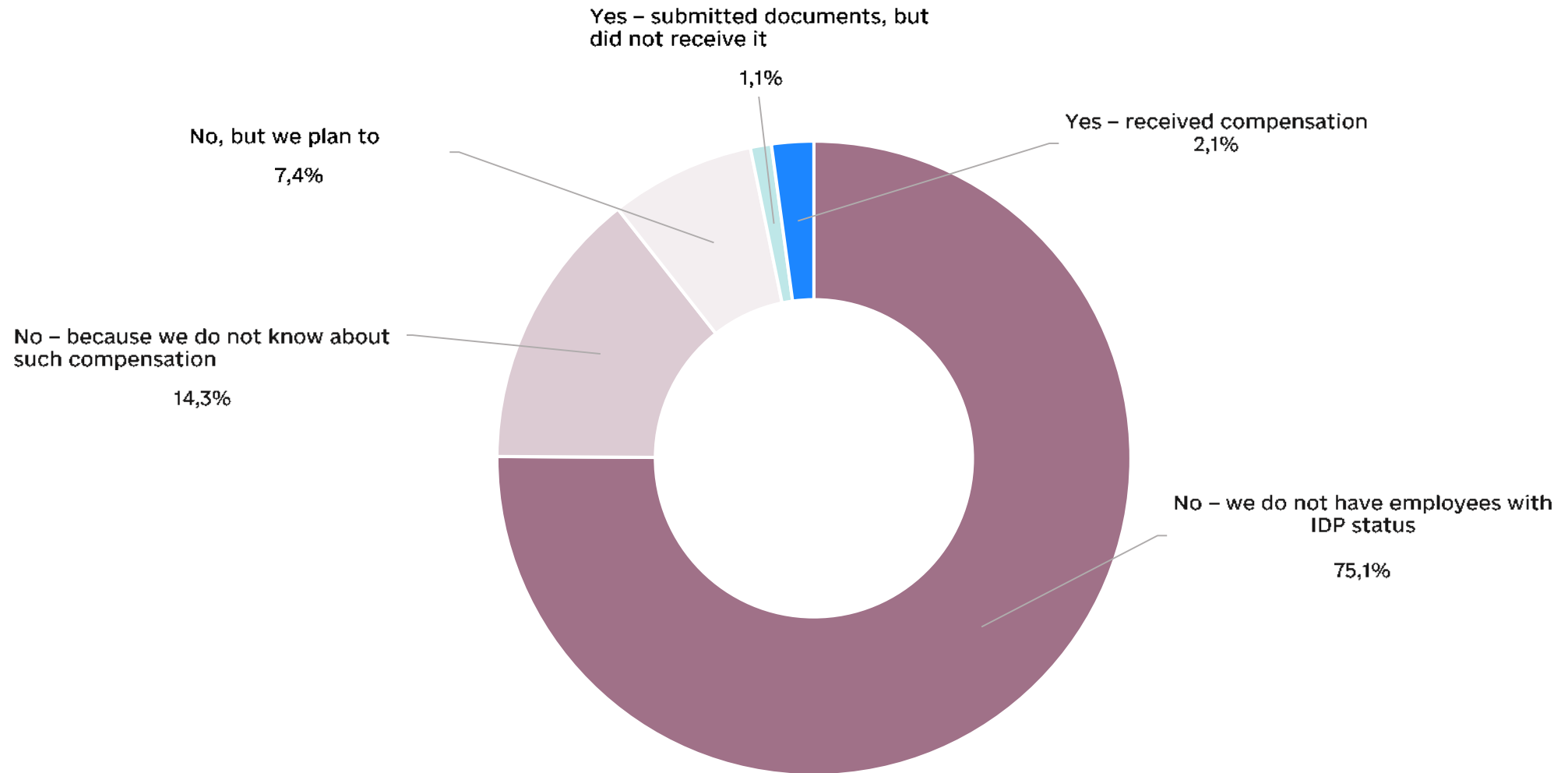
How many employees have you hired in the last 6 months?



34%

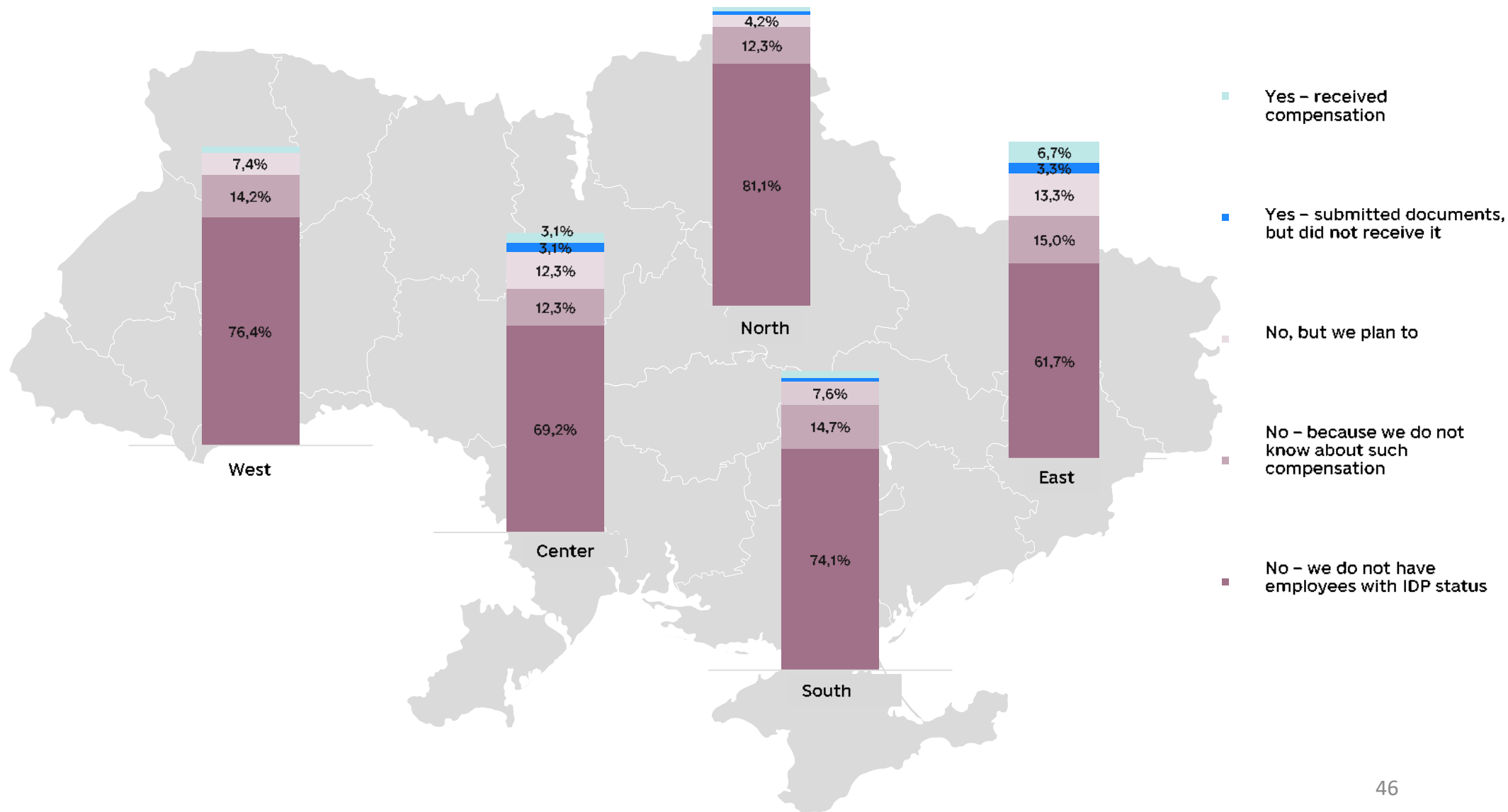
share of employees
(of those hired since
the beginning of the
full-scale invasion)
with IDP status

Have you applied to the state for compensation for employed persons with IDP status and received it?

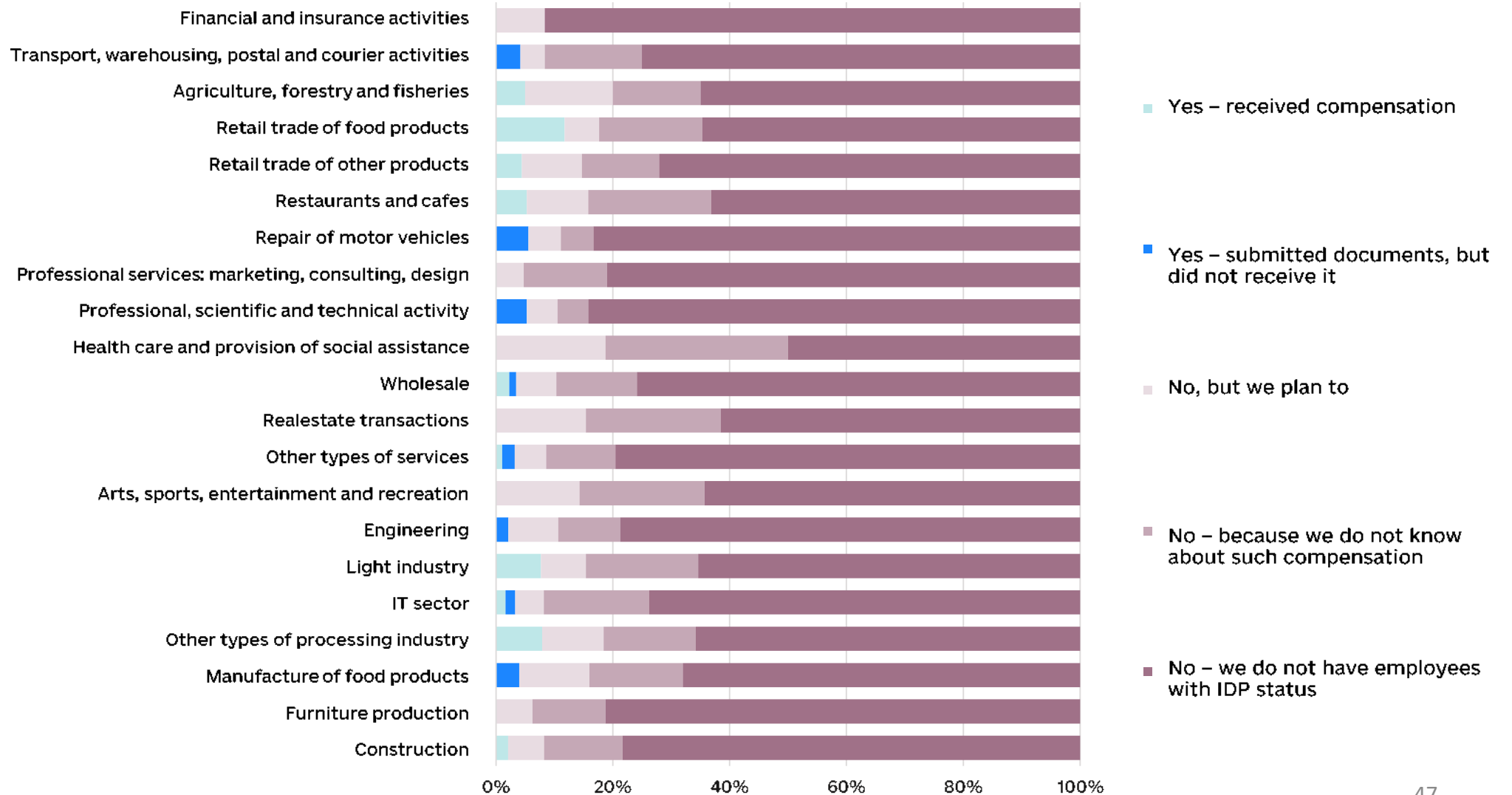


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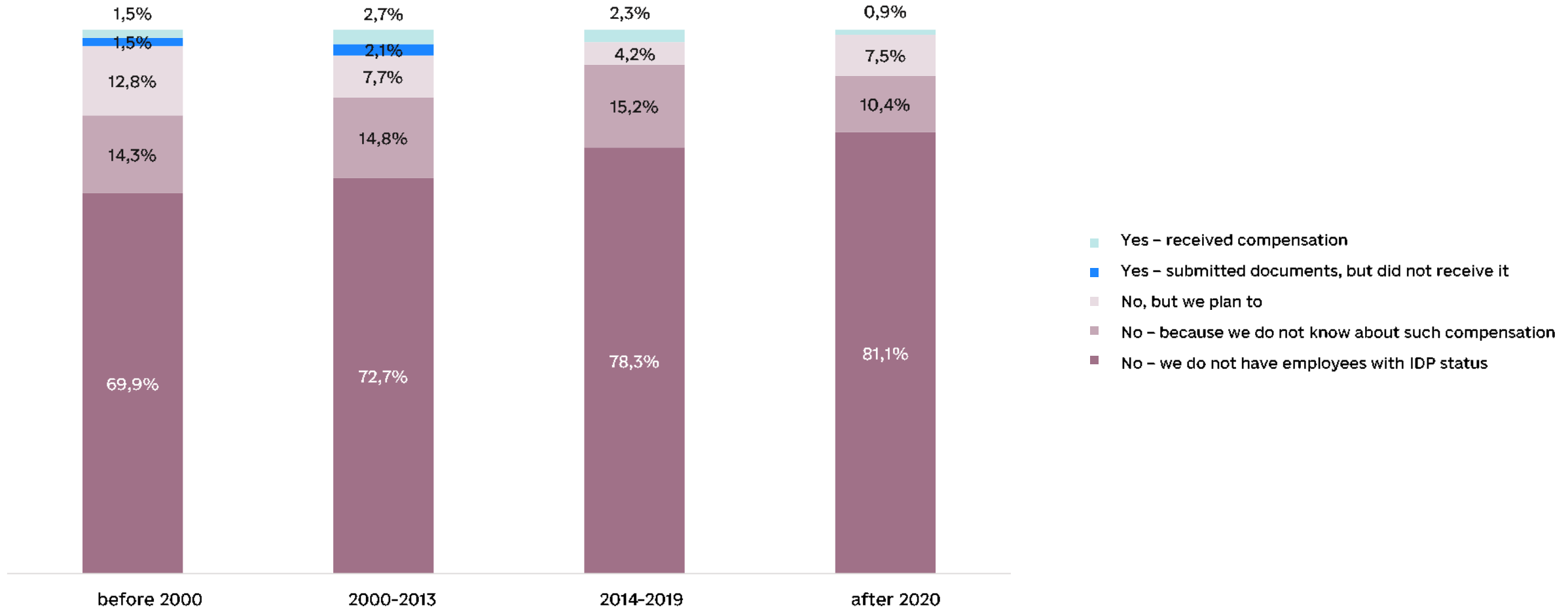
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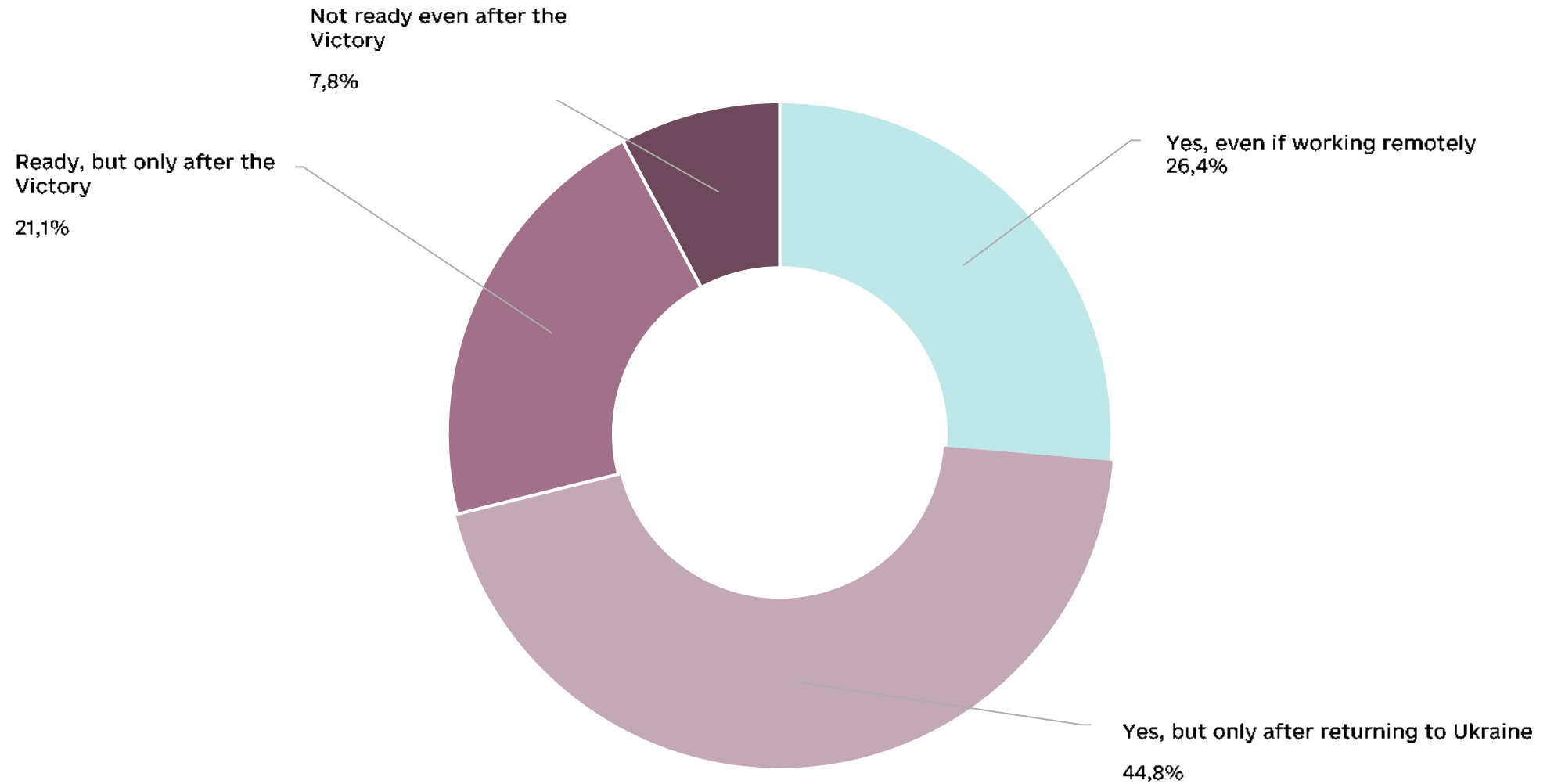
Have you applied to the state for compensation for employed persons with IDP status and received it? (by industry)



Have you applied to the state for compensation for employed persons with IDP status and received it? (year of business establishment)

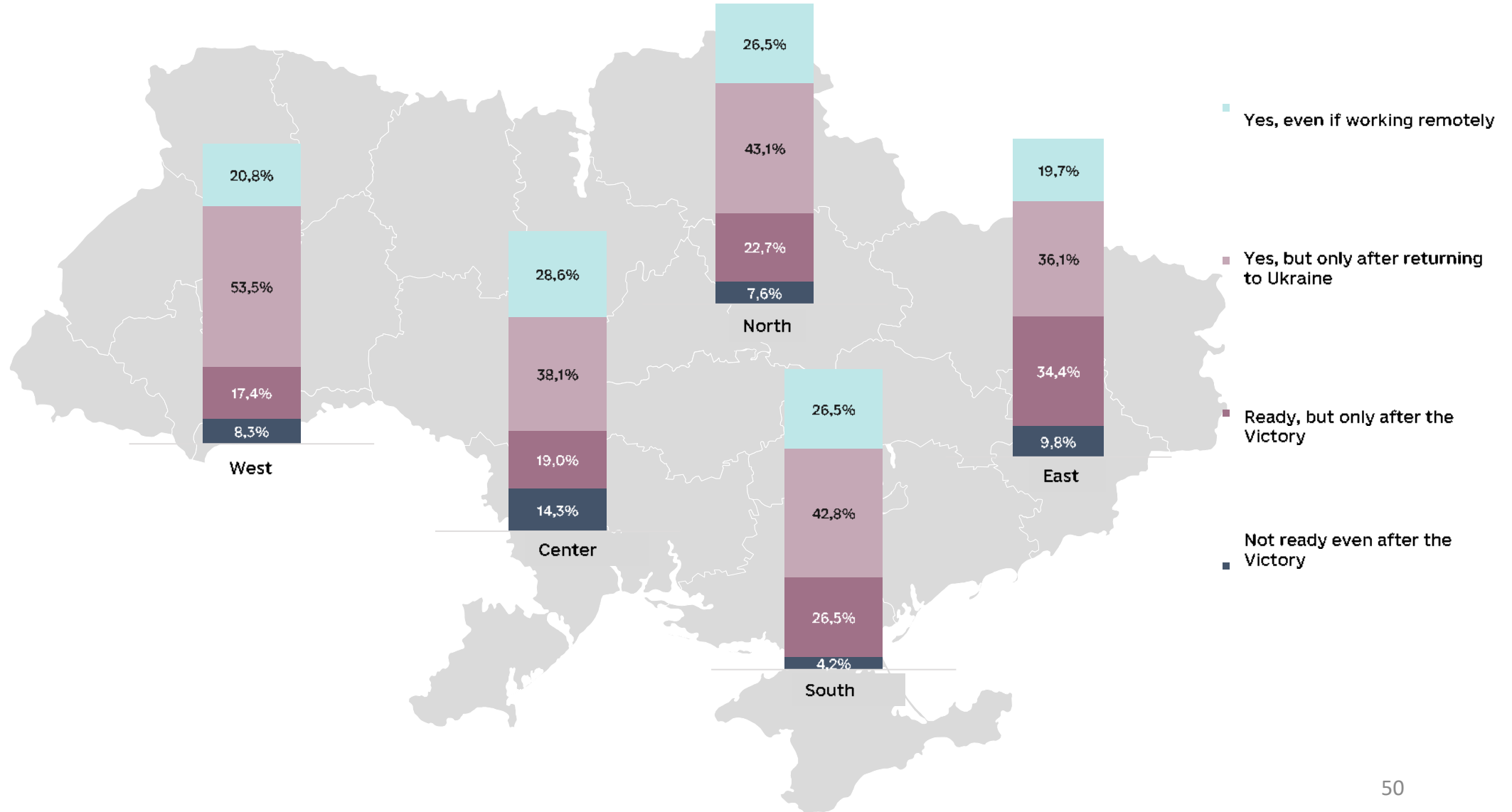


Are you ready to hire Ukrainians who left abroad after 24.02.2022?

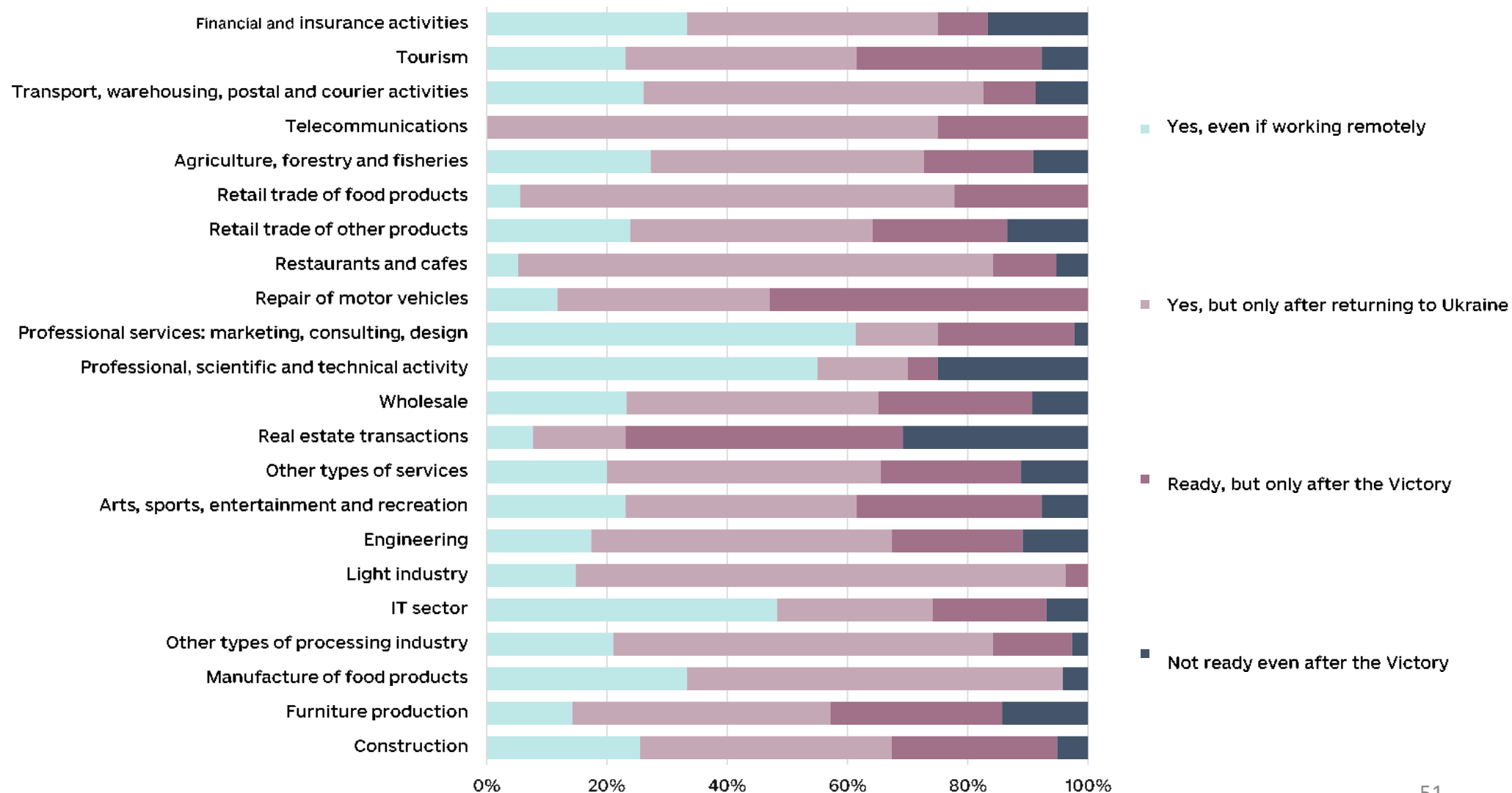


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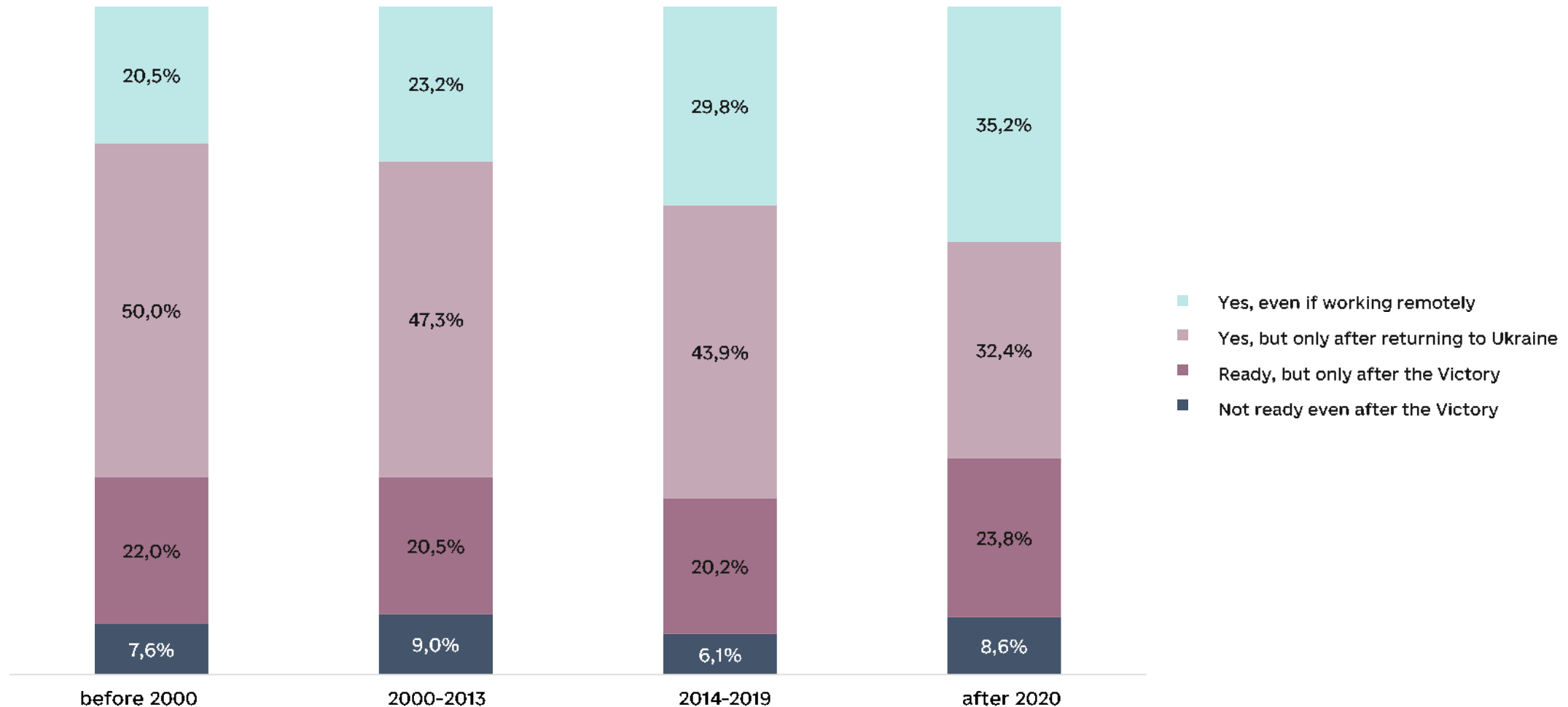
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- Vinnysia region
- Kirovohrad region
- Poltava region
- Cherkasy region



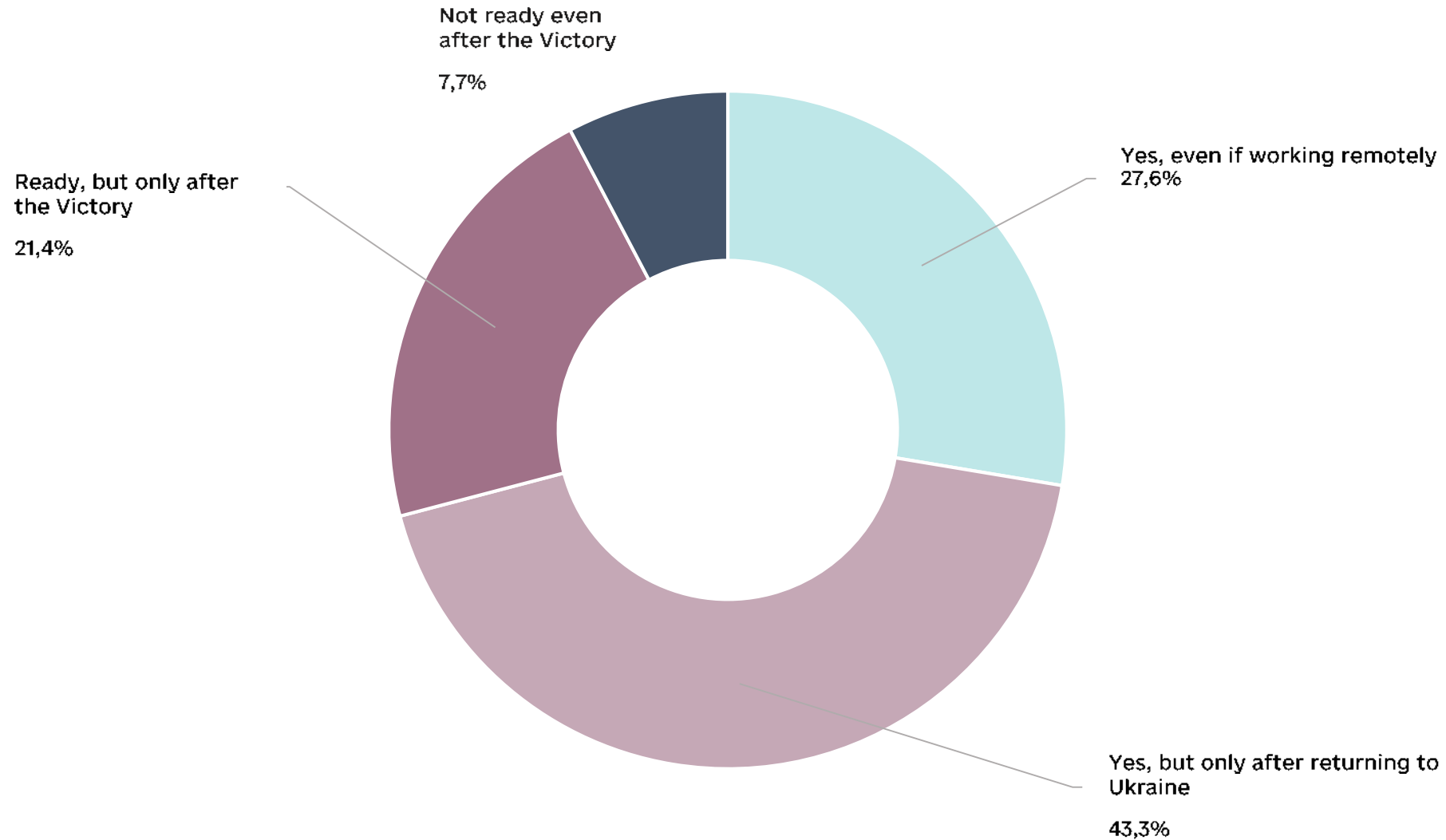
Are you ready to hire Ukrainians who left abroad after 24.02.2022? (by industry)



Are you ready to hire Ukrainians who left abroad after 24.02.2022? (year of business establishment)

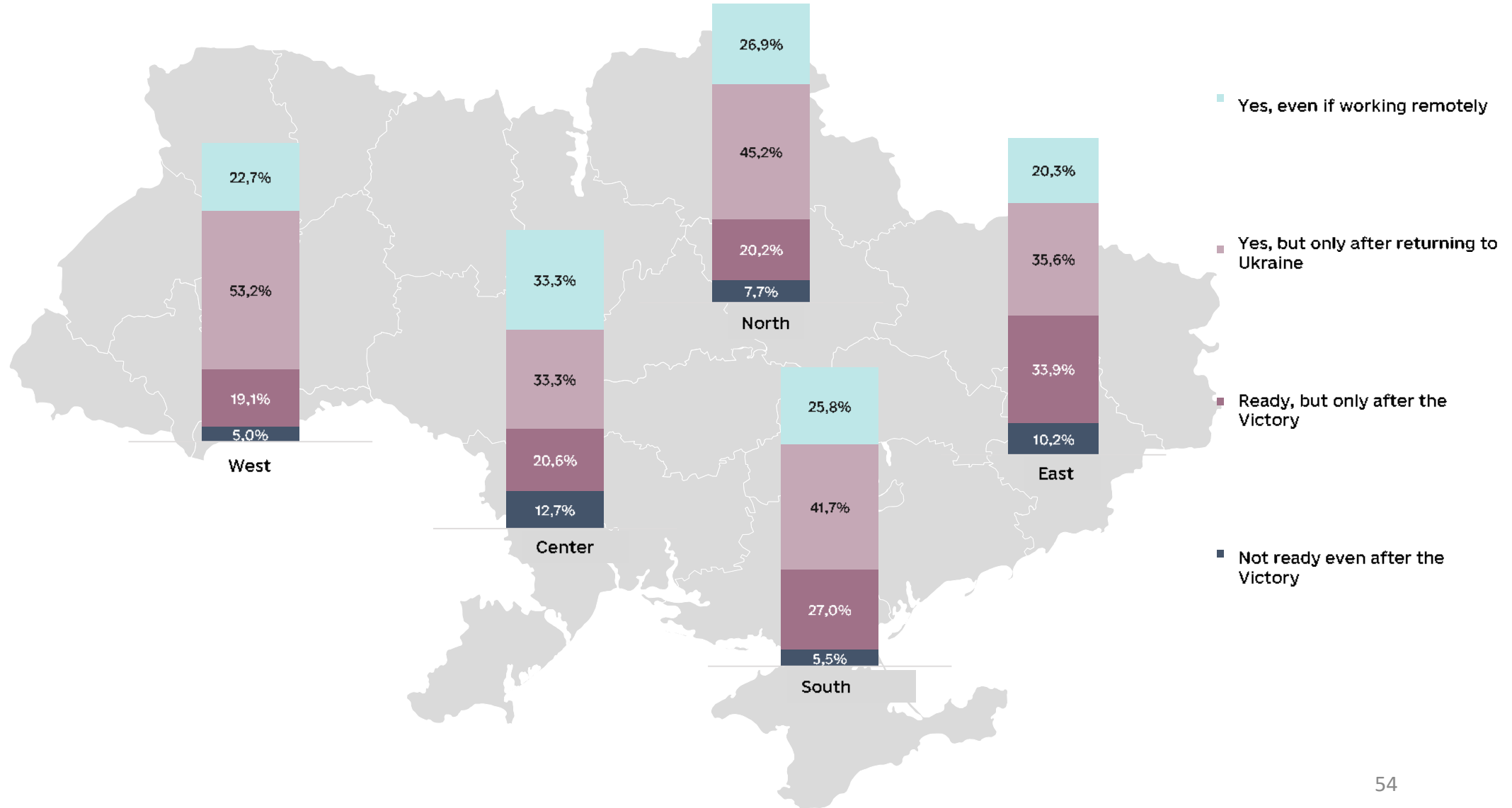


Are you ready to hire people from the Ukrainian diaspora (who lived abroad before 24.02.22) who may return to Ukraine?

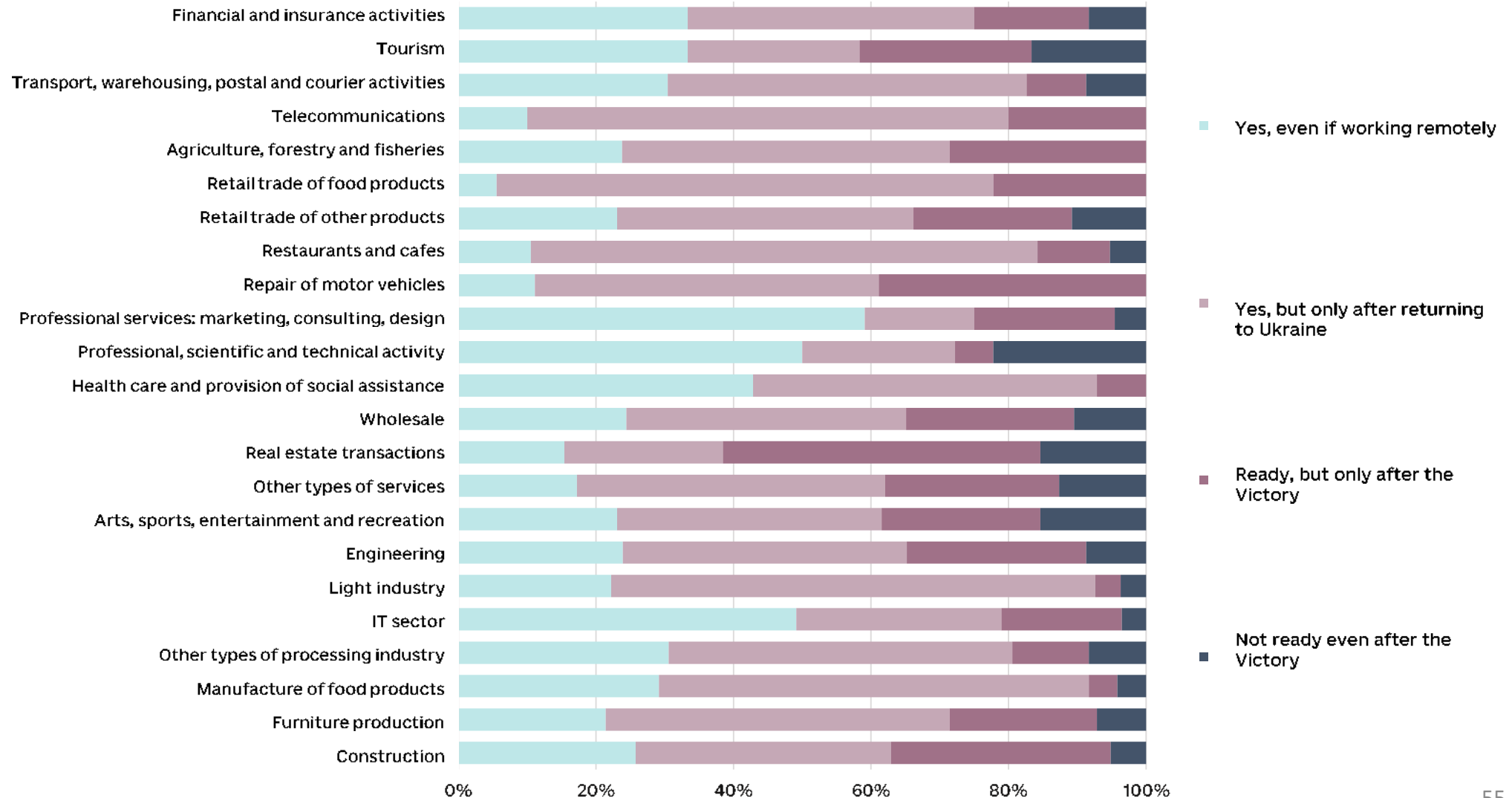


Are you ready to hire people from the Ukrainian diaspora (who lived abroad before 24.02.22) who may return to Ukraine?

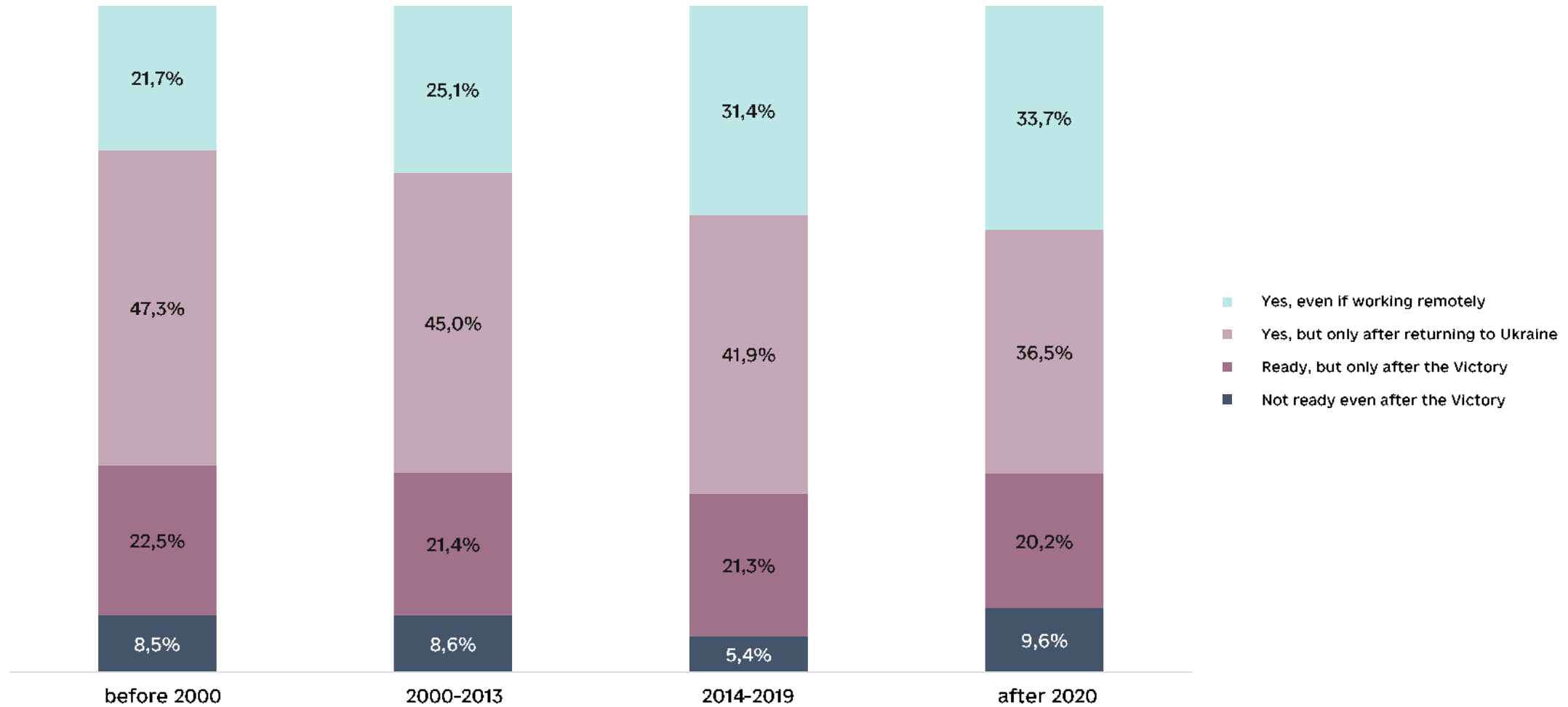
- West
- Volyn region
- Zakarpattia region
- Ivano-Frankivsk region
- Lviv region
- Rivne region
- Ternopil region
- Khmelnytskyi region
- Chernivtsi region
- South
- AR Crimea
- Dnipropetrovsk region
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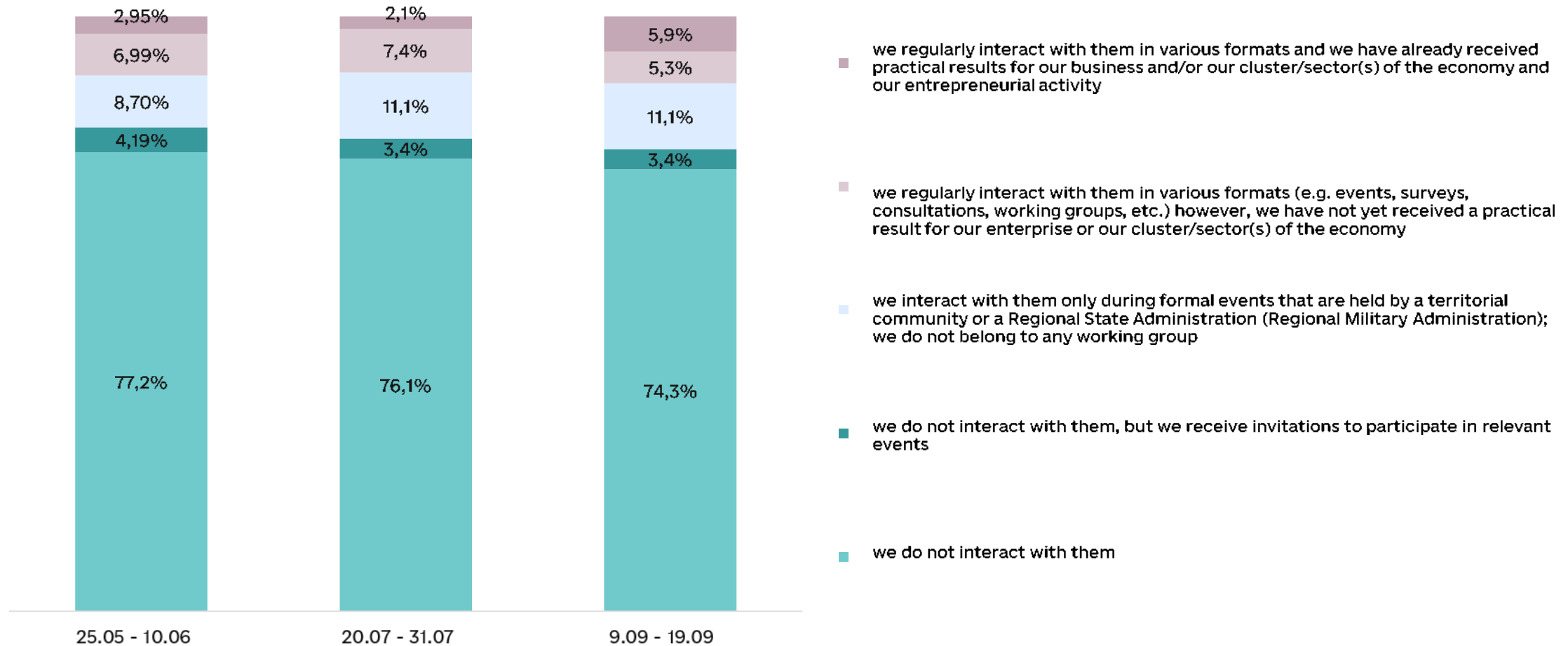
Are you ready to hire people from the Ukrainian diaspora (who lived abroad before 24.02.22) who may return to Ukraine? (by industry)



Are you ready to hire people from the Ukrainian diaspora (who lived abroad before 24.02.22) who may return to Ukraine? (year of business establishment)

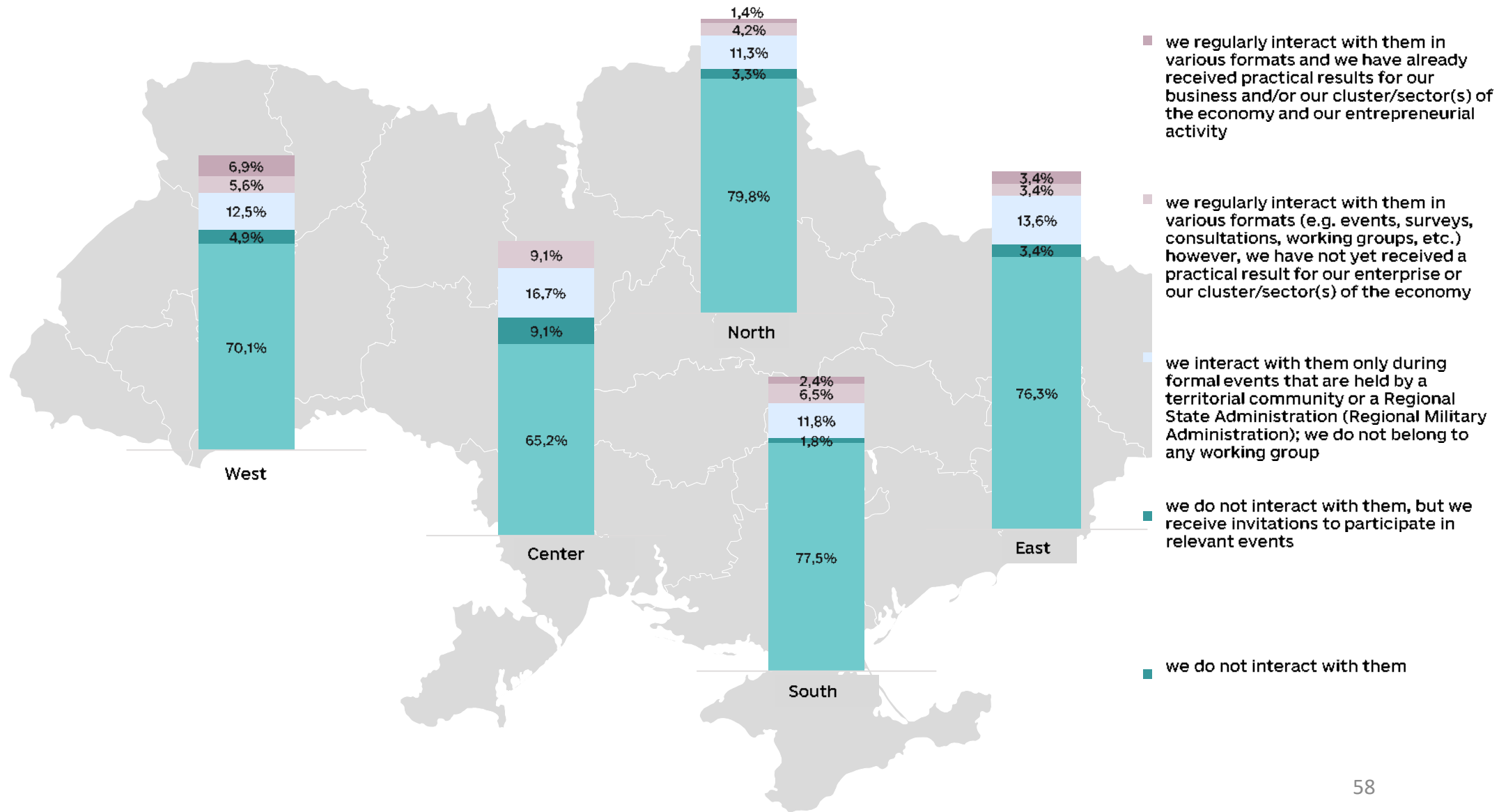


Experience of interaction with the representatives of Regional State Administrations (Regional Military Administrations) and territorial communities on resuming entrepreneurship development

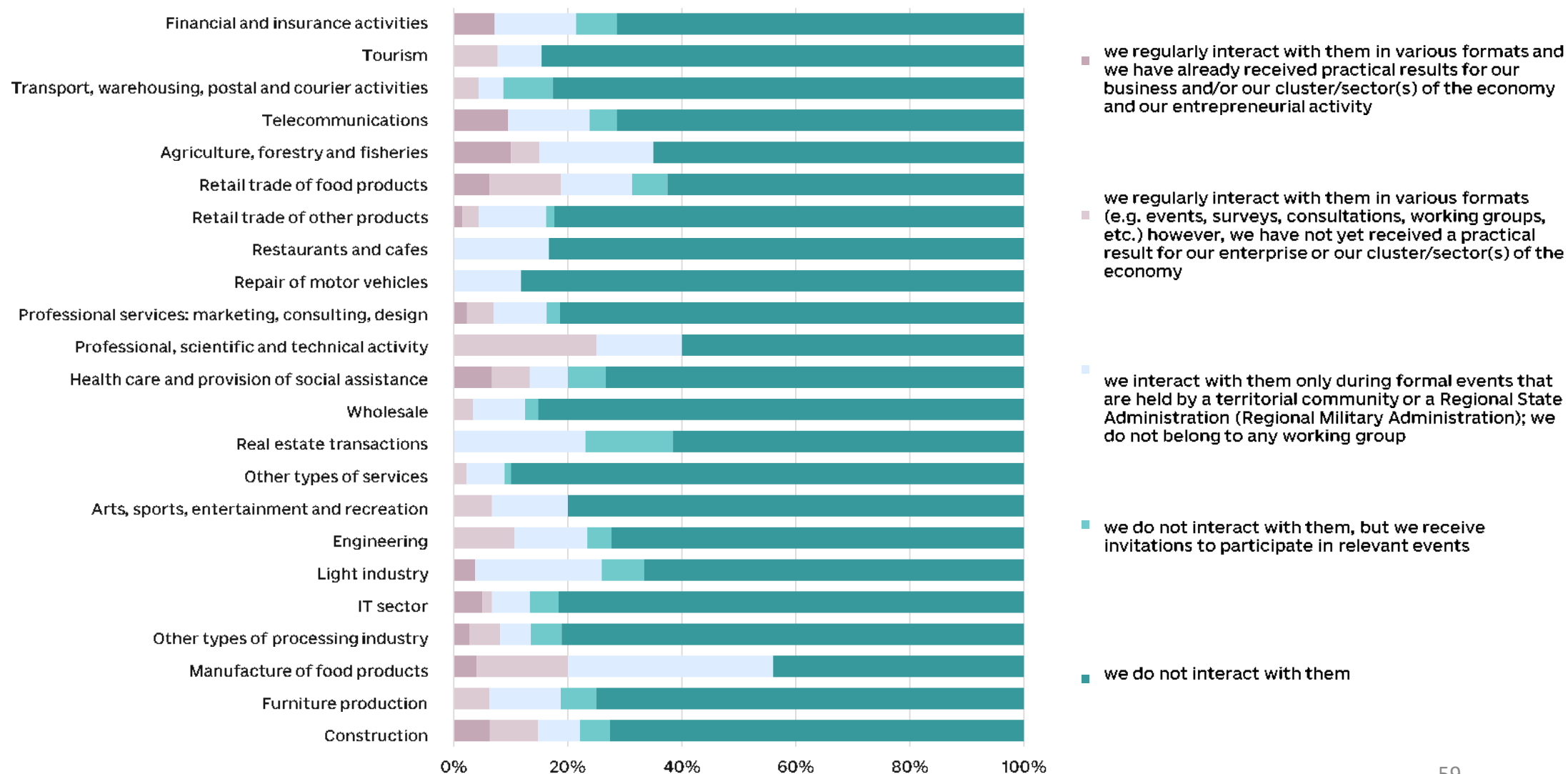


Experience of interaction with the representatives of Regional State Administrations (Regional Military Administrations) and territorial communities on resuming entrepreneurship development

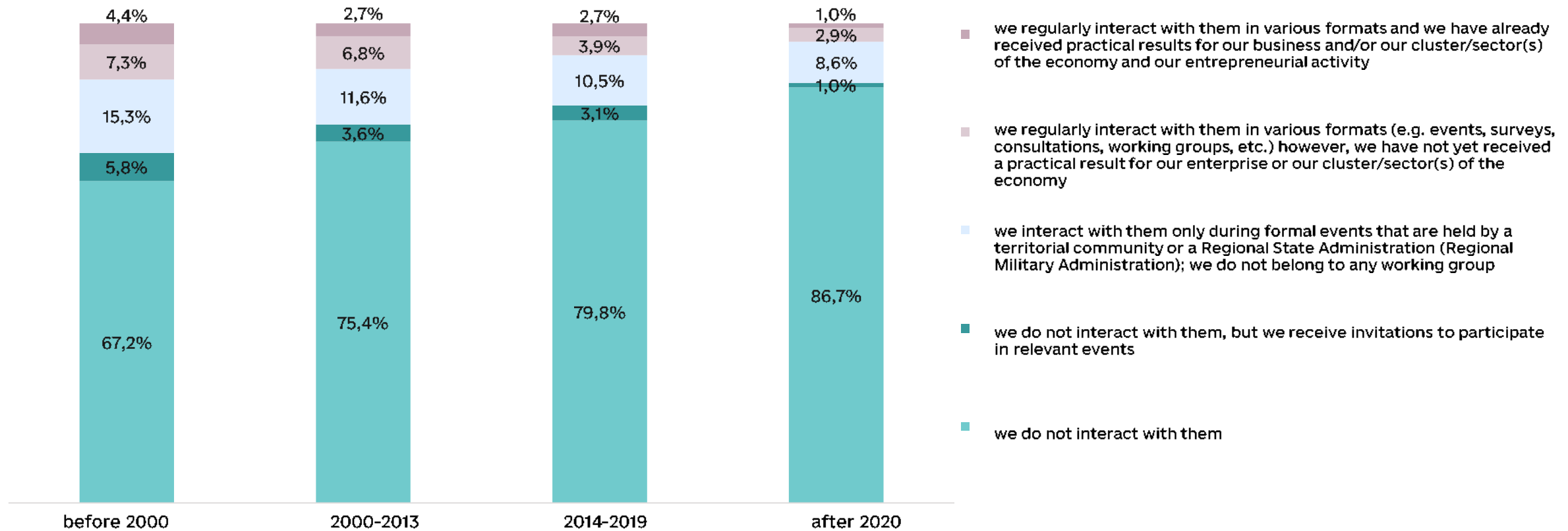
West
Volyn region
Zakarpattia region
Ivano-Frankivsk region
Lviv region
Rivne region
Ternopil region
Khmelnyskyi region
Chernivtsi region
South
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Zaporizhzhia region
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Center
Vinnysia region
Kirovohrad region
Poltava region
Cherkasy region



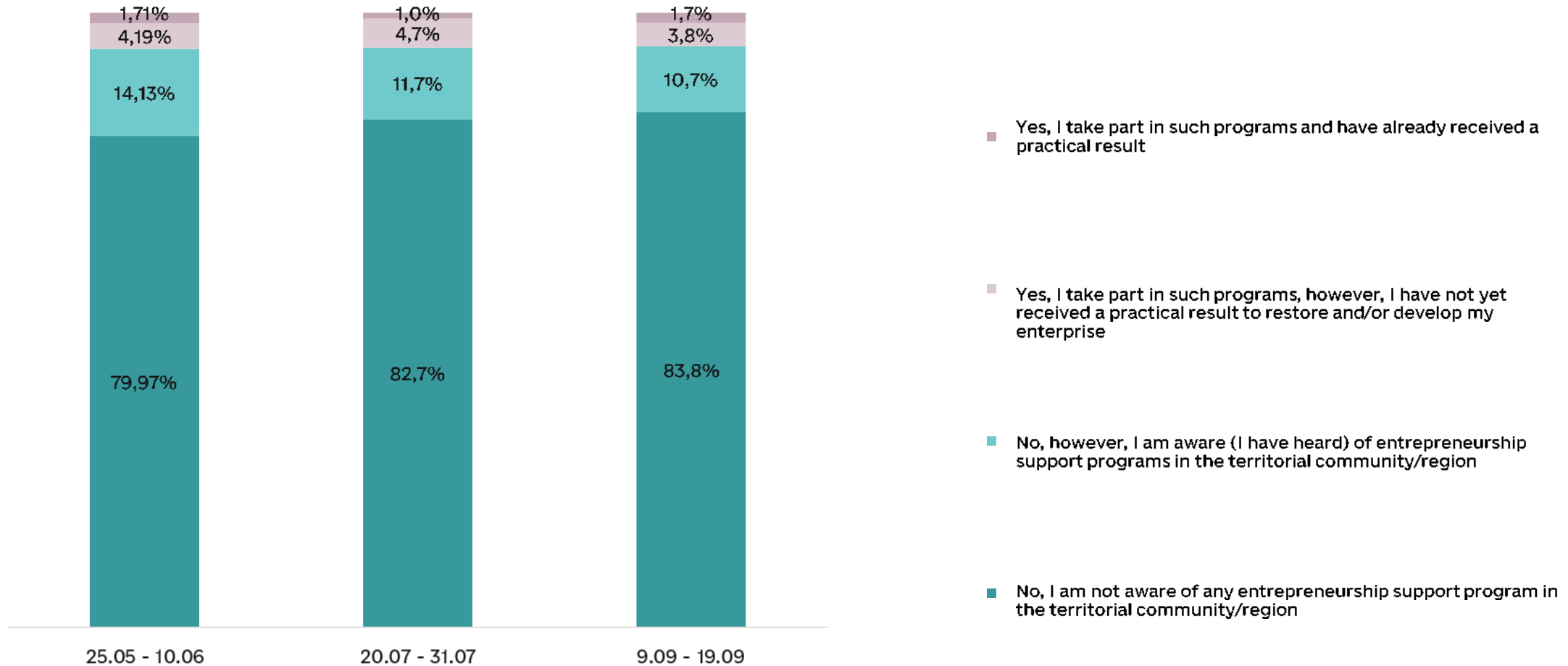
Experience of interaction with the representatives of Regional State Administrations (Regional Military Administrations) and territorial communities on resuming entrepreneurship development (by industry)



Experience of interaction with the representatives of Regional State Administrations (Regional Military Administrations) and territorial communities on resuming entrepreneurship development (year of business establishment)

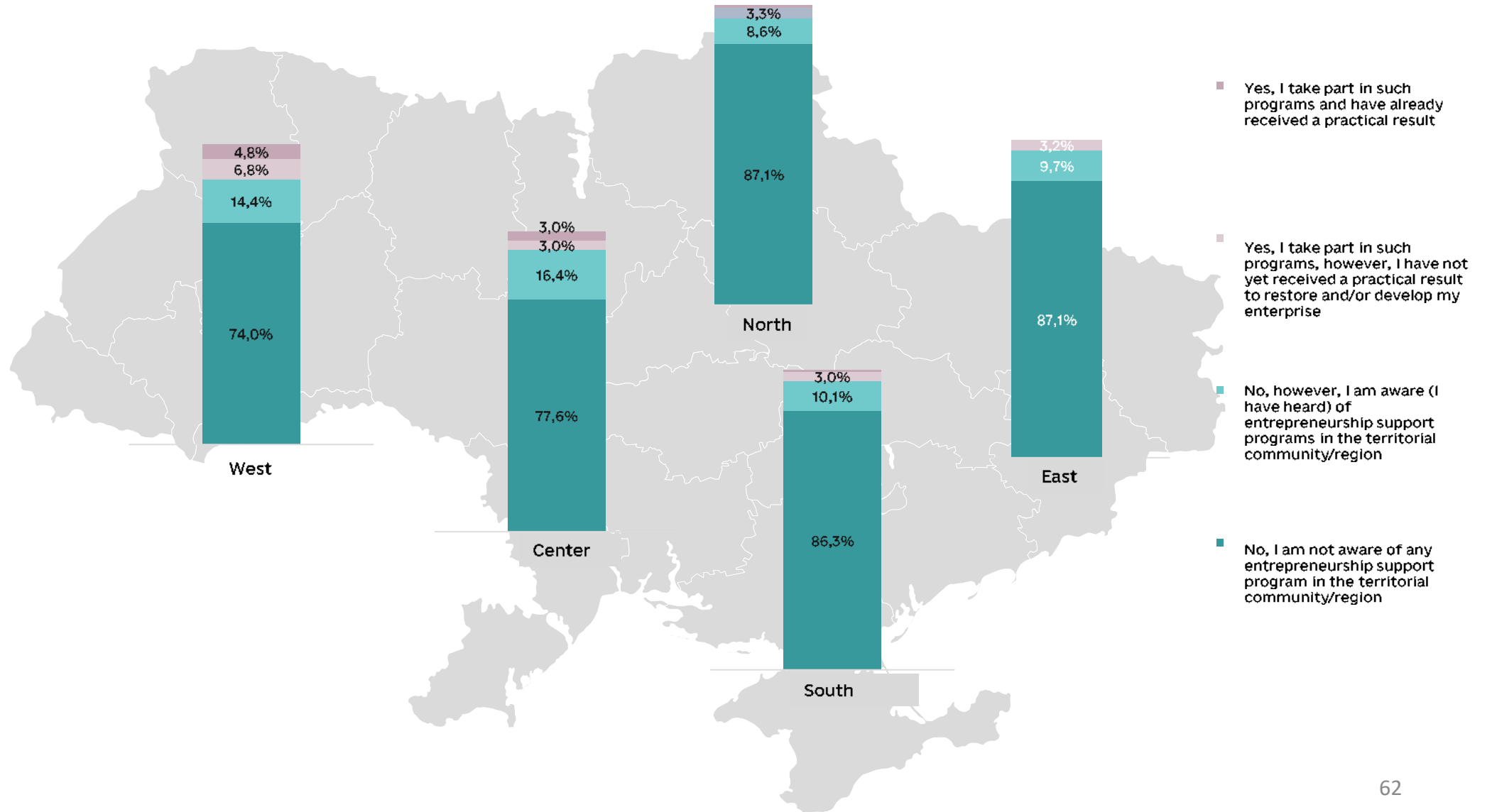


Participation in entrepreneurship support programs from territorial communities or Regional State Administrations (Regional Military Administrations)

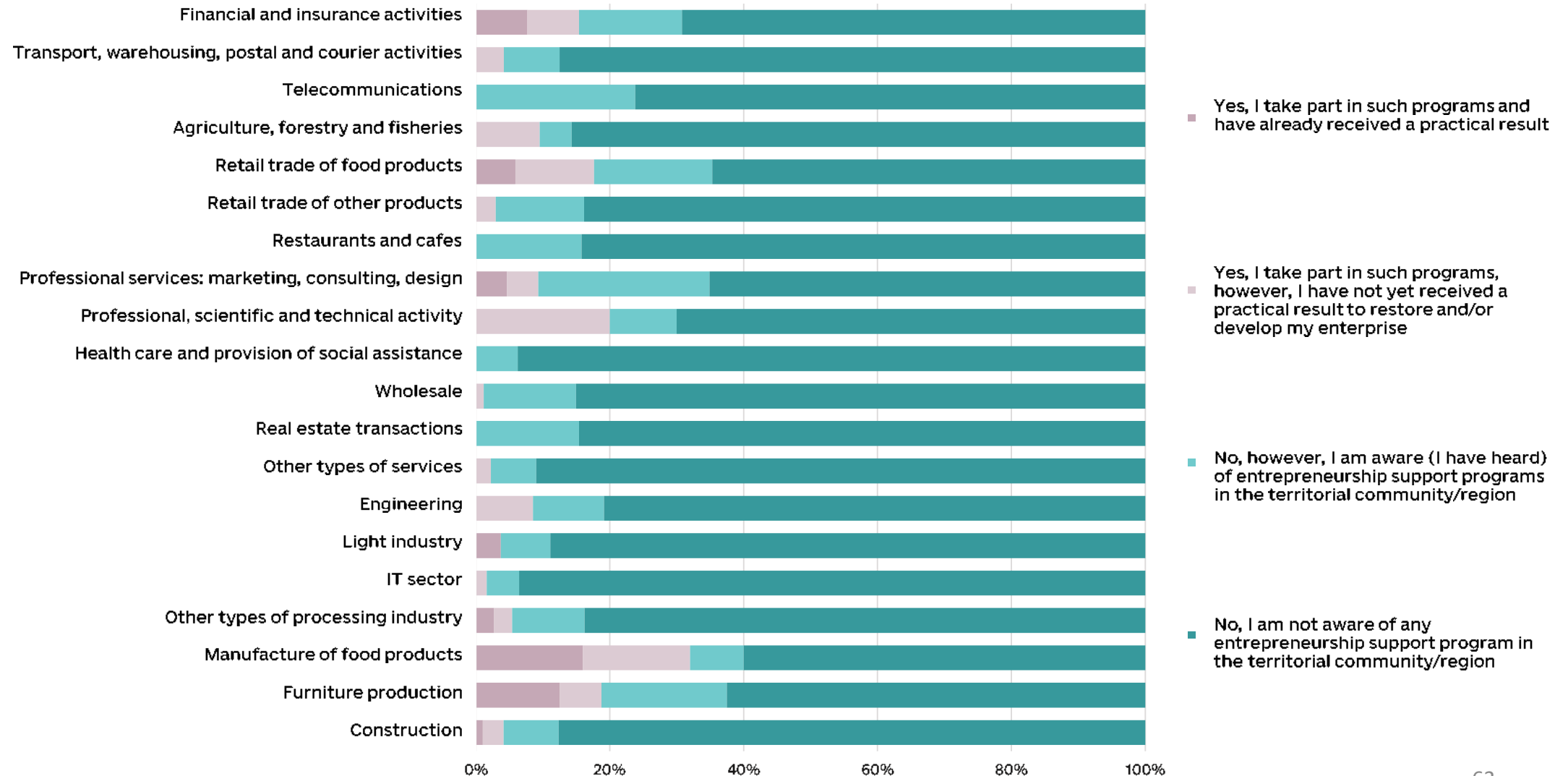


Participation in entrepreneurship support programs from territorial communities or Regional State Administrations (Regional Military Administrations)

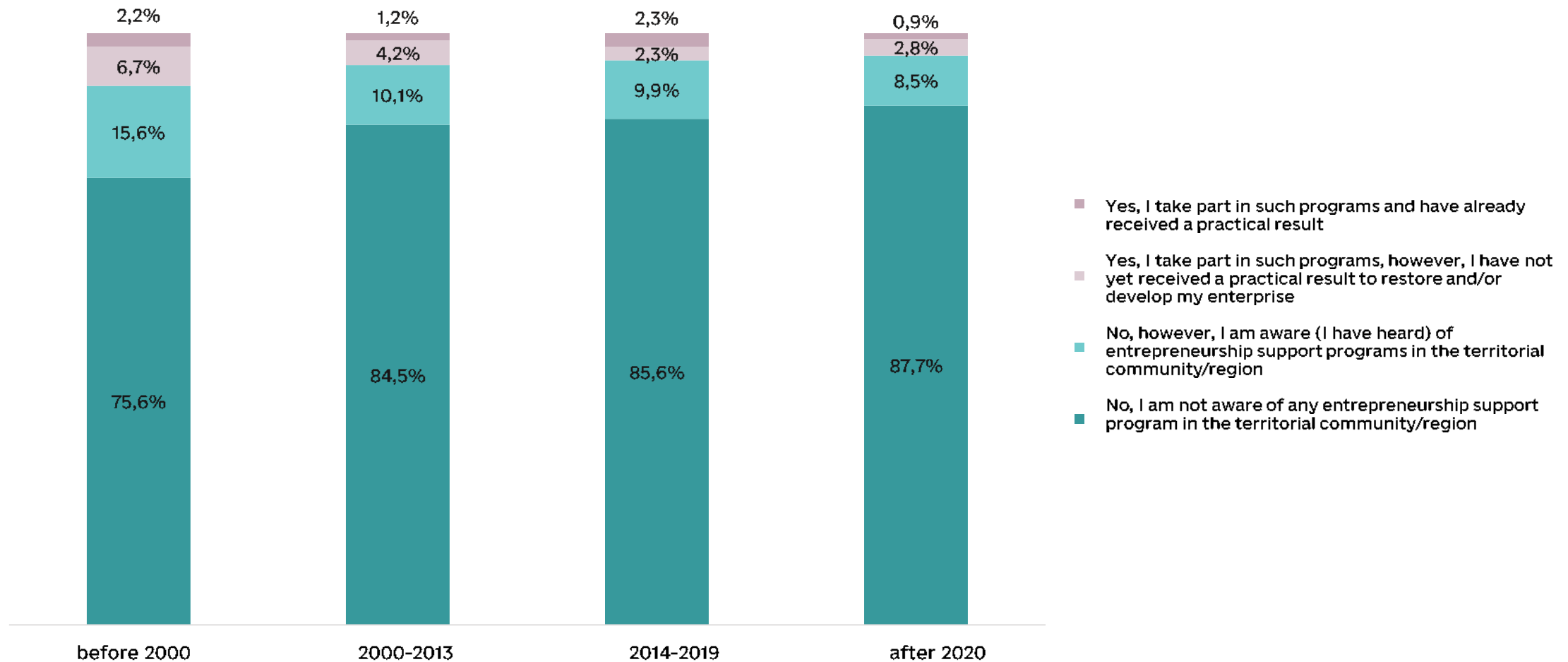
West
Volyn region
Zakarpattia region
Ivano-Frankivsk region
Lviv region
Rivne region
Ternopil region
Khmelnyskyi region
Chernivtsi region
South
AR Crimea
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Sumy region
Chernihiv region
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Luhansk region
Kharkiv region
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Vinnysia region
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Poltava region
Cherkasy region



Participation in entrepreneurship support programs from territorial communities or Regional State Administrations (Regional Military Administrations) (by industry)





Participation in entrepreneurship support programs from territorial communities or Regional State Administrations (Regional Military Administrations) (year of business establishment)



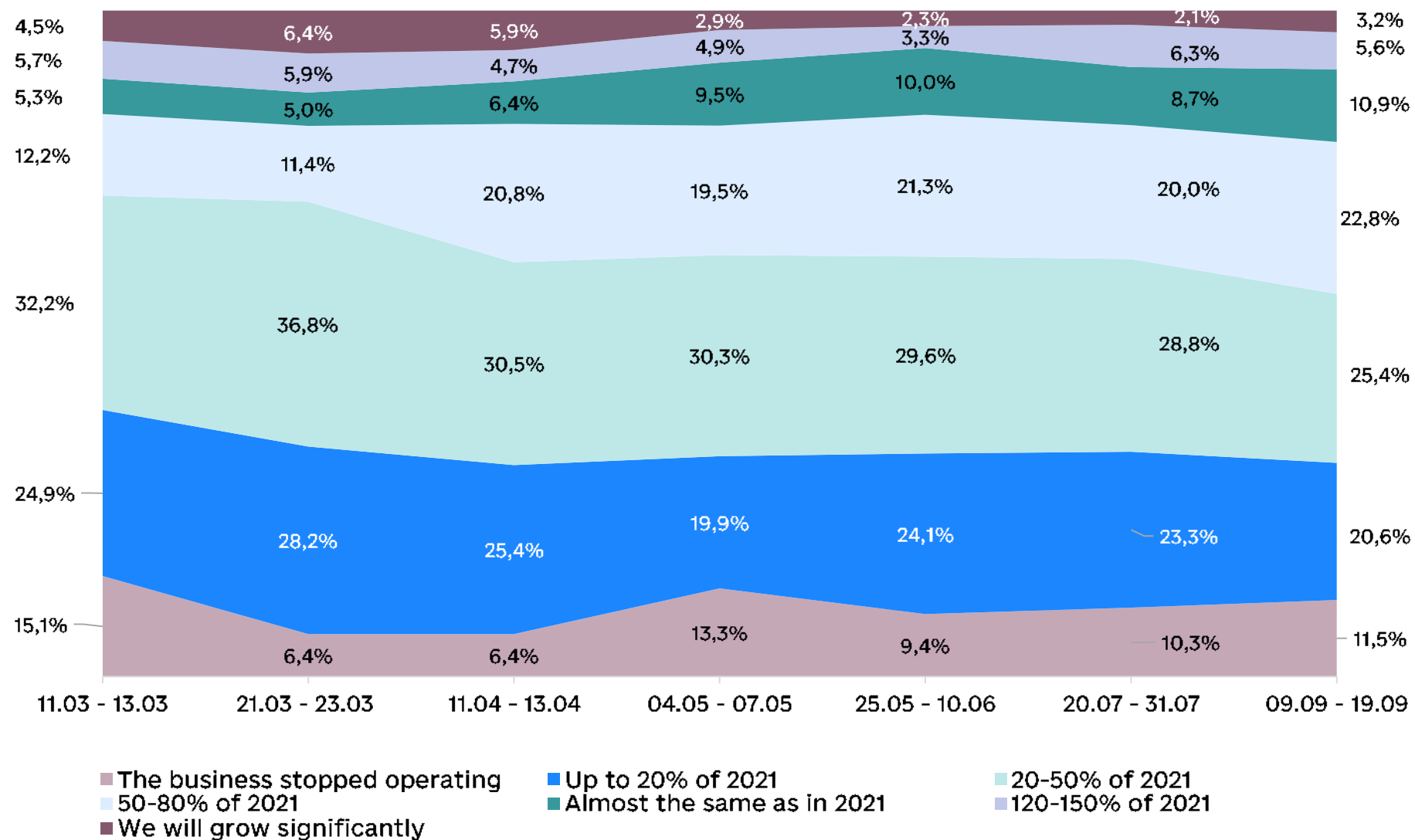
Expected losses in the volume of business sales in 2022, by enterprise size

Average expected volume of sales in 2022 :

54%

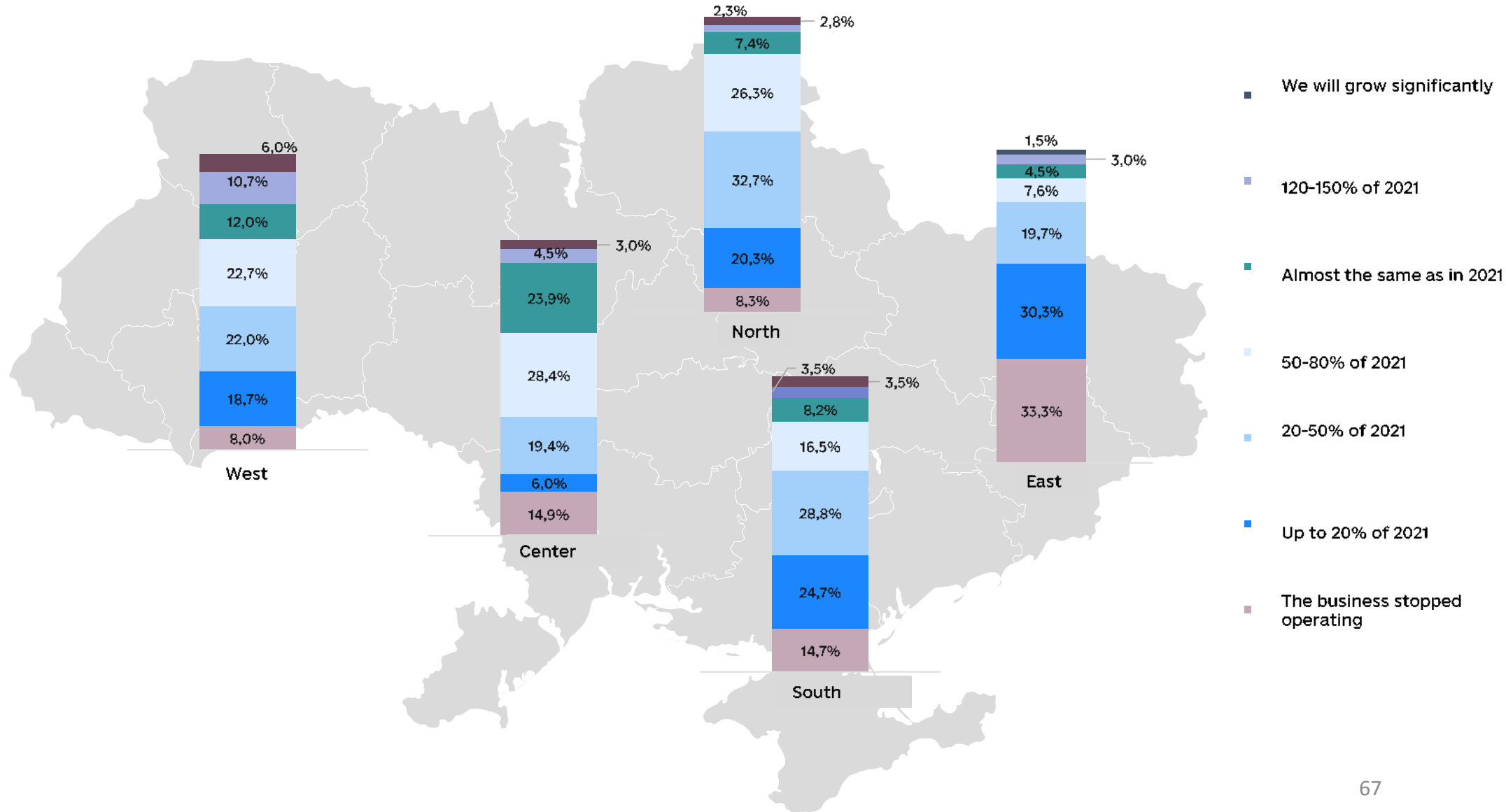
	Share in the total volume of sales (2020)	Expected volume of sales in 2022 (in relation to 2021)						
		11.03 – 13.03	21.03 – 23.03	11.04 – 13.04	04.05 – 07.05	25.05 – 04.06	20.07 – 31.07	09.09 – 19.09
Micro enterprises (not including private entrepreneurs)	6%	40%	61,2%	71,8%	48,2%	43,0%	44,6%	48,7% 
Small enterprises	12%	47%	49,3%	61,7%	45,2%	50,5%	51,7%	51,9%
Medium-sized enterprises	39%	38%	29,2%	47,3%	57,3%	57,3%	63,8%	76,8% 

Business income forecasts for 2022 compared to 2021 (percentage of enterprises)

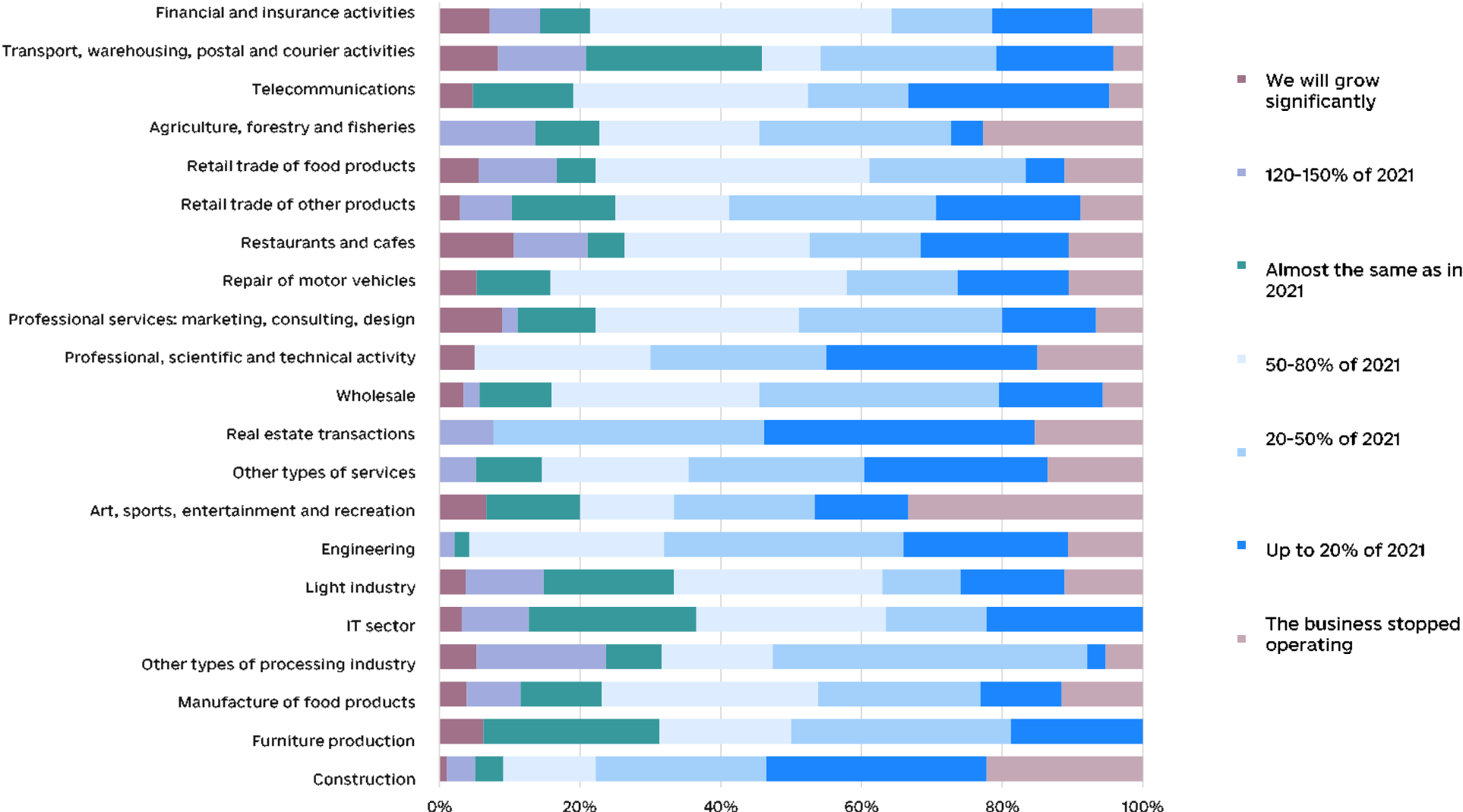


Business income forecasts for 2022 compared to 2021 (percentage of enterprises)

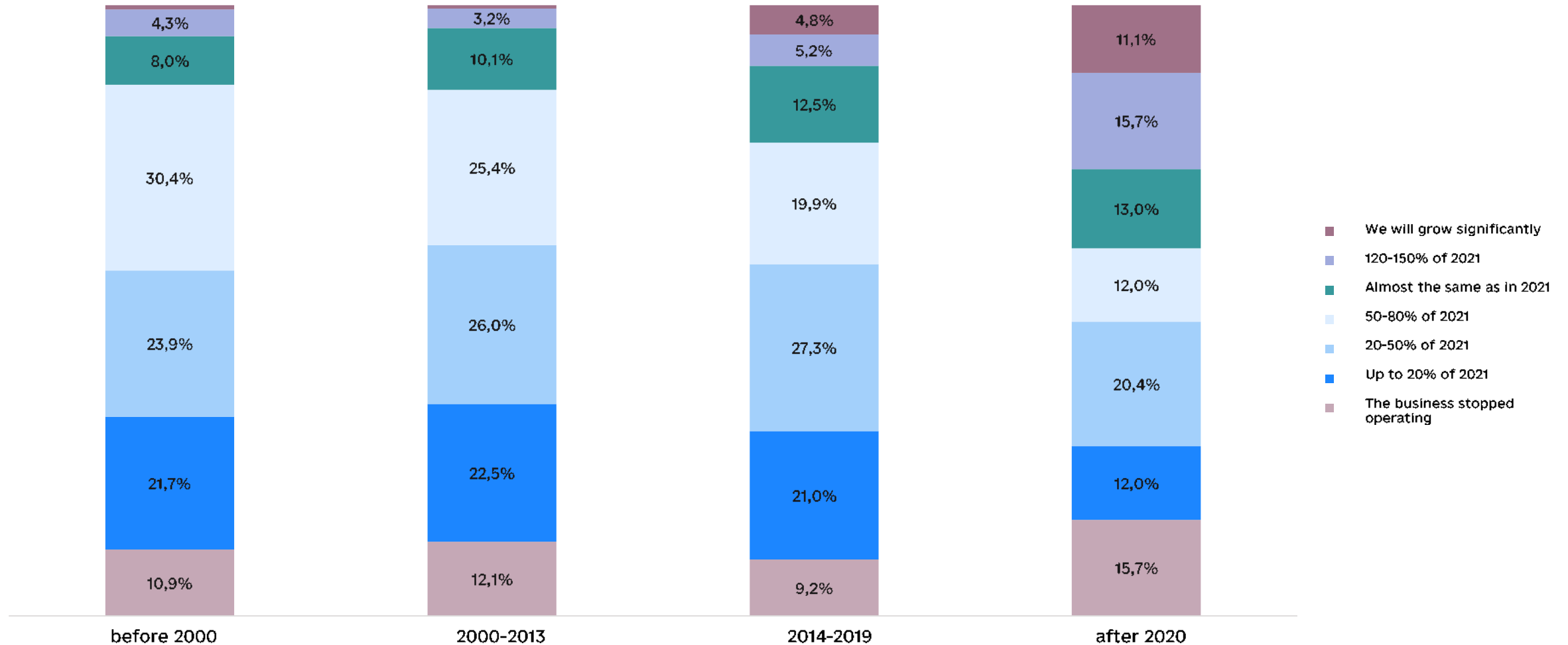
West
Volyn region
Zakarpattia region
Ivano-Frankivsk region
Lviv region
Rivne region
Ternopil region
Khmelnyskyi region
Chernivtsi region
South
AR Crimea
Dnipropetrovsk region
Zaporizhzhia region
Mykolaiv region
Odesa region
Kherson region
North
Zhytomyr region
Kyiv
Kyiv region
Sumy region
Chernihiv region
East
Donetsk region
Luhansk region
Kharkiv region
Center
Vinnitsia region
Kirovohrad region
Poltava region
Cherkasy region



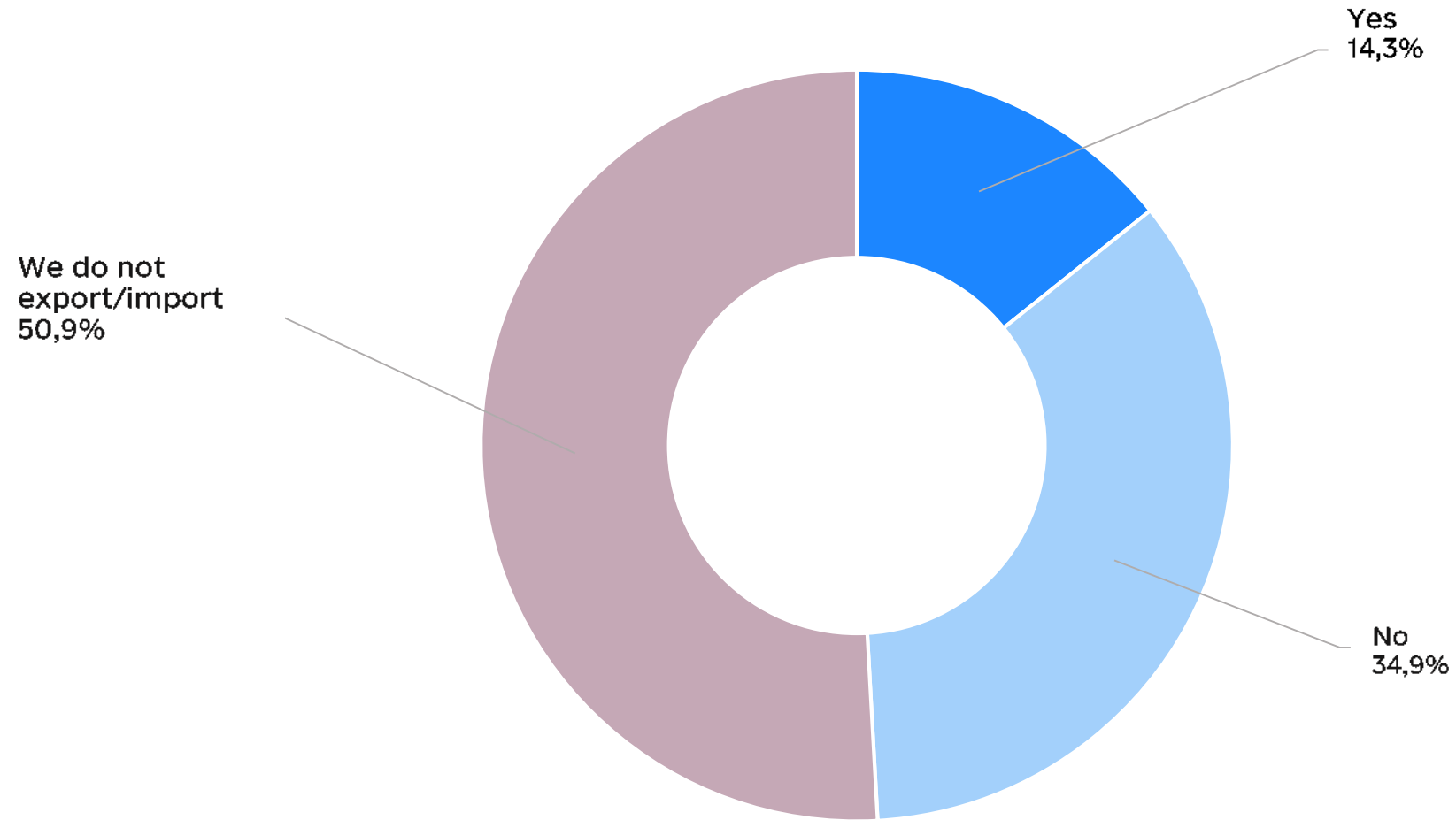
Business income forecasts for 2022 compared to 2021 (by industry)



Business income forecasts for 2022 compared to 2021 (year of business establishment)

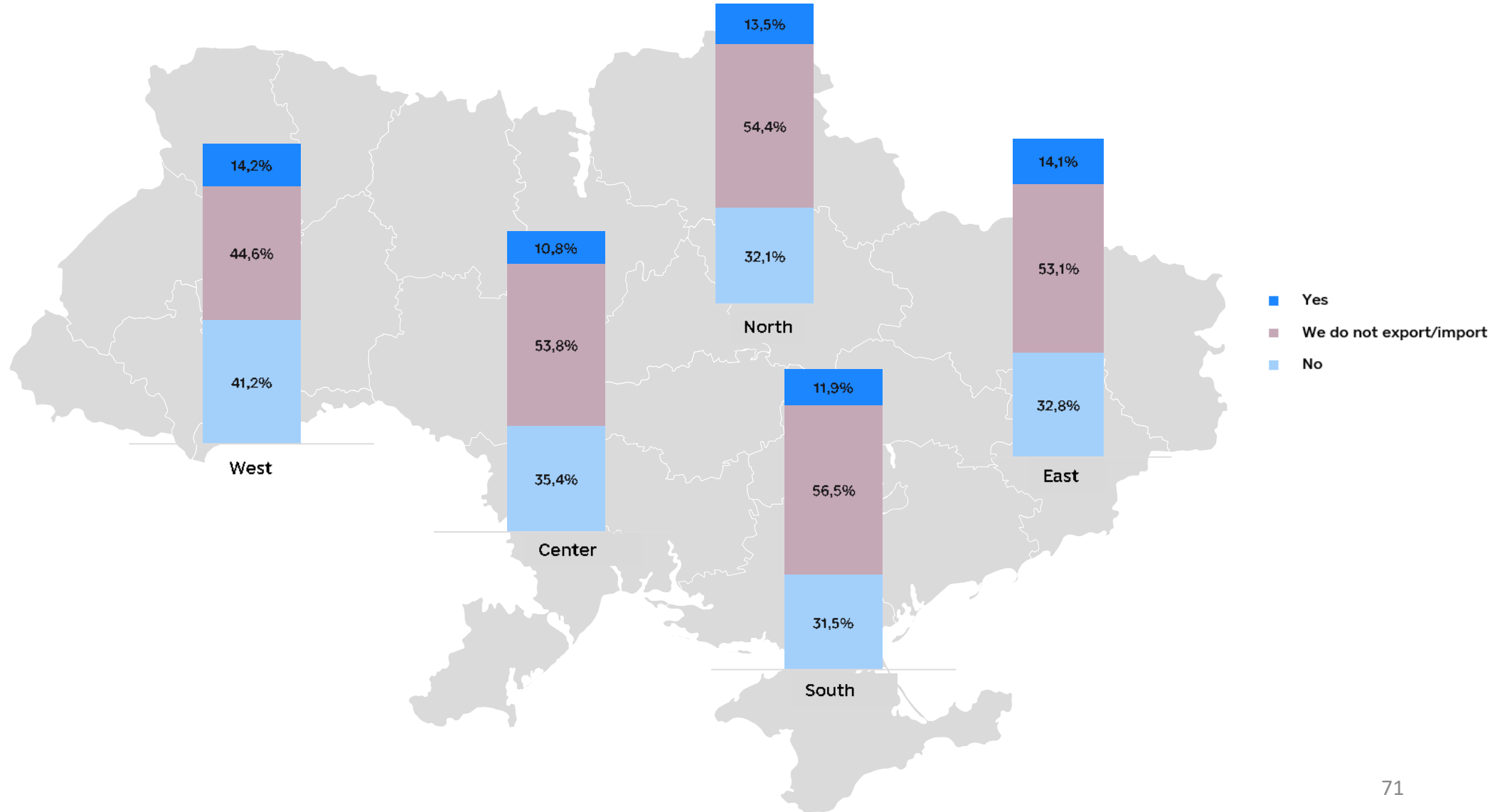


Do you conclude foreign economic contracts in electronic form?

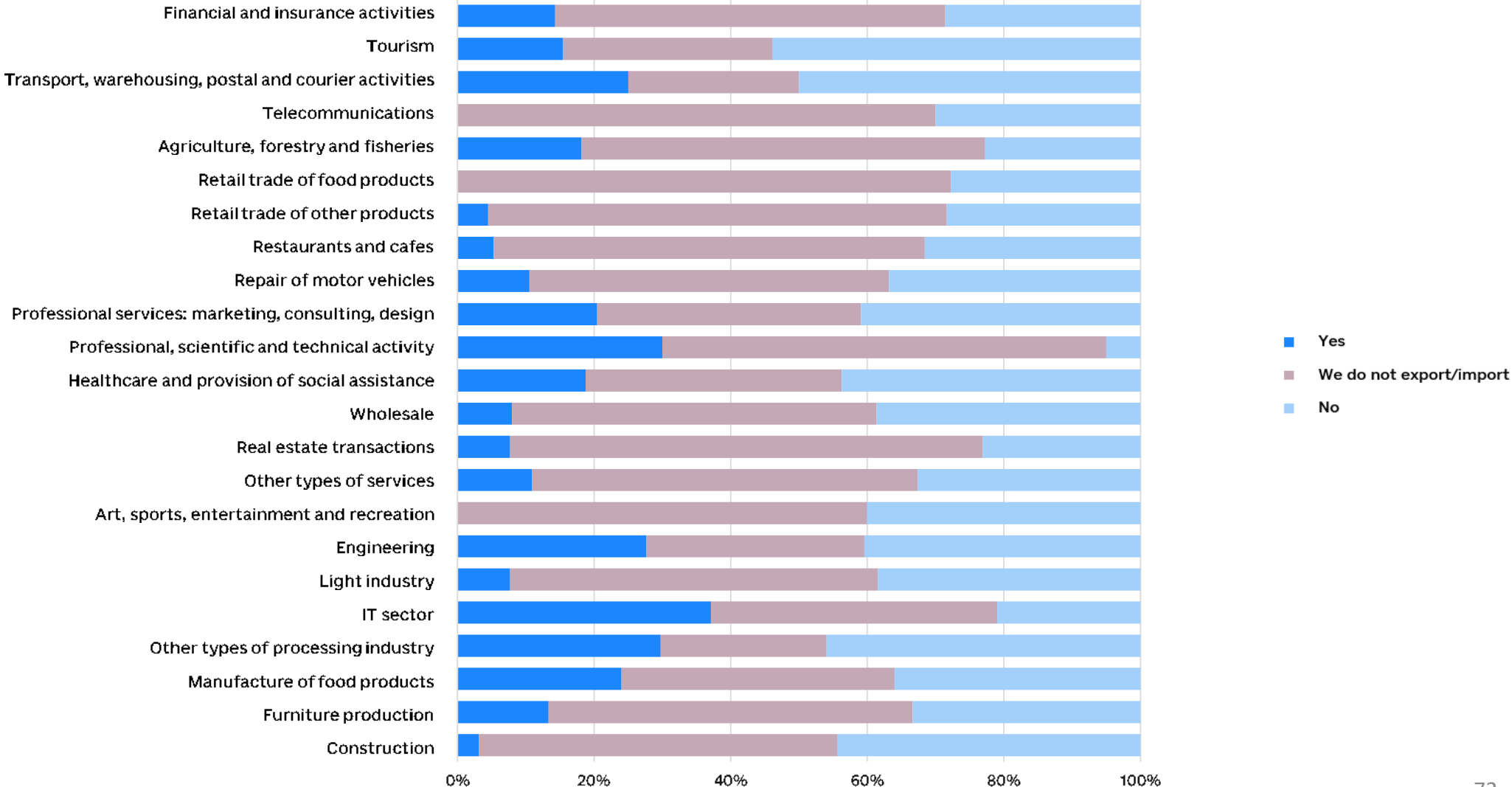


Do you conclude foreign economic contracts in electronic form?

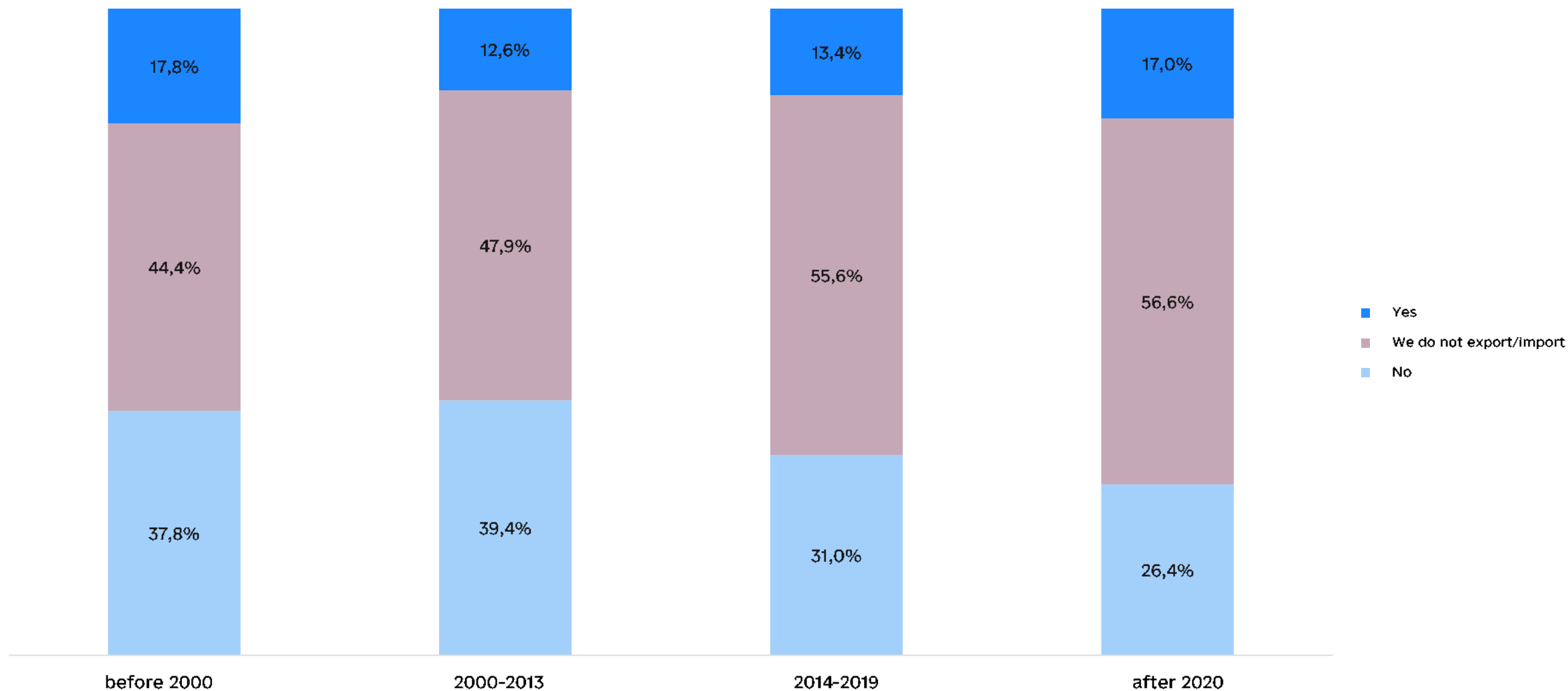
- West
- Volyn region
- Zakarpattia region
- Ivano-Frankivsk region
- Lviv region
- Rivne region
- Ternopil region
- Khmelnyskyi region
- Chernivtsi region
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- Vinnitsia region
- Kirovohrad region
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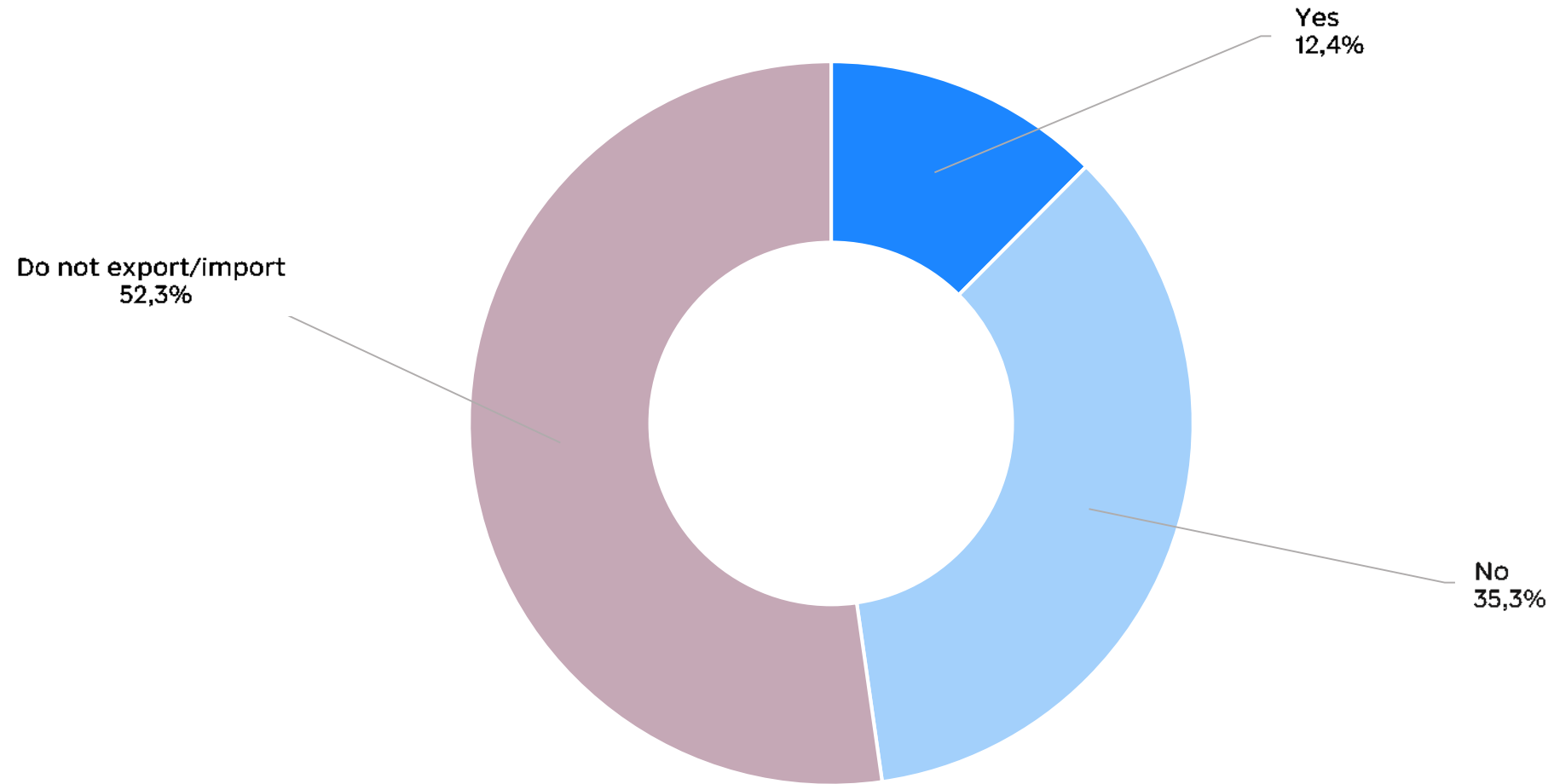
Do you conclude foreign economic contracts in electronic form? (by industry)



Do you conclude foreign economic contracts in electronic form? (year of business establishment)

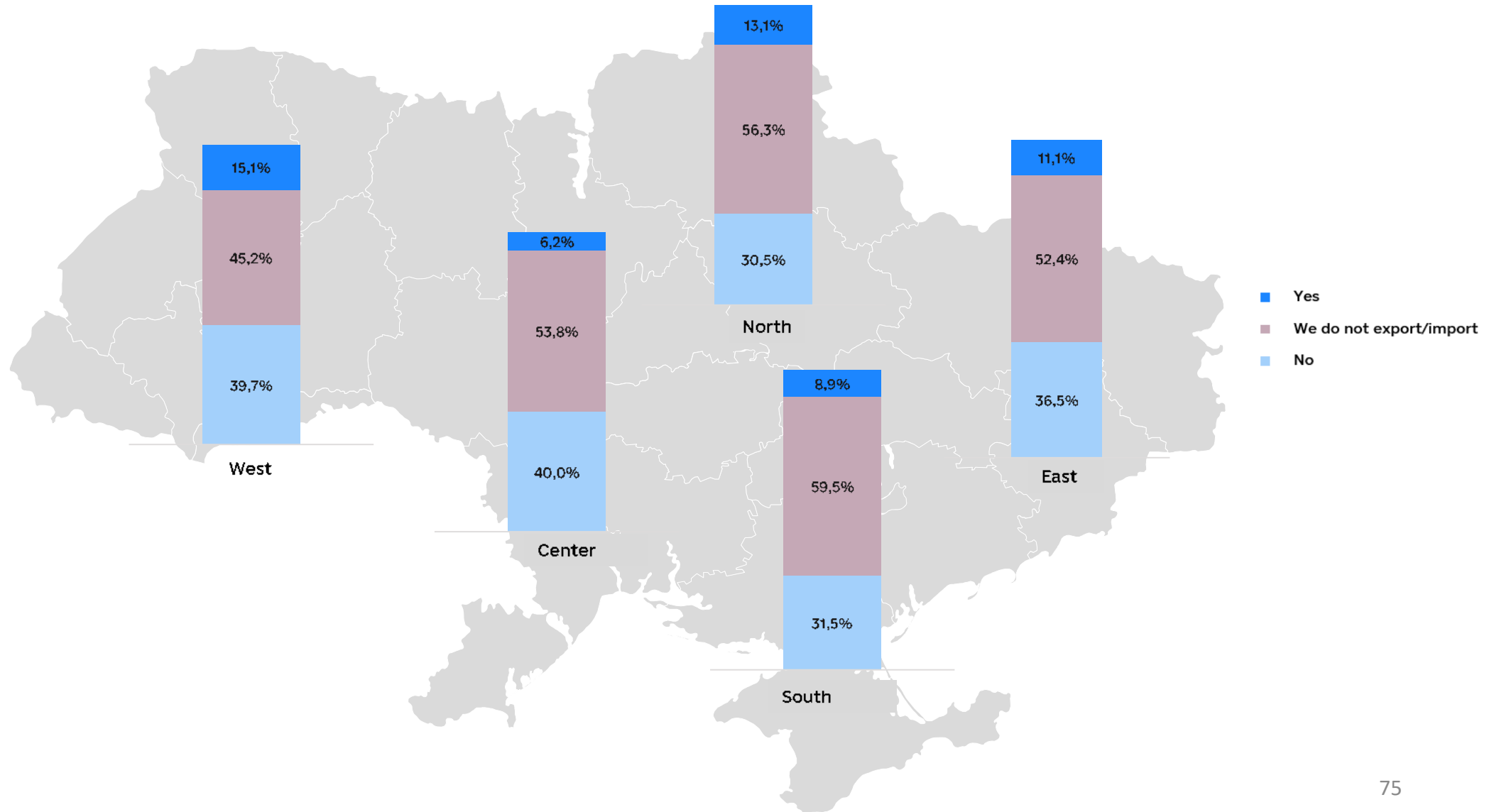


Do you conclude foreign economic contracts by issuing an electronic invoice?

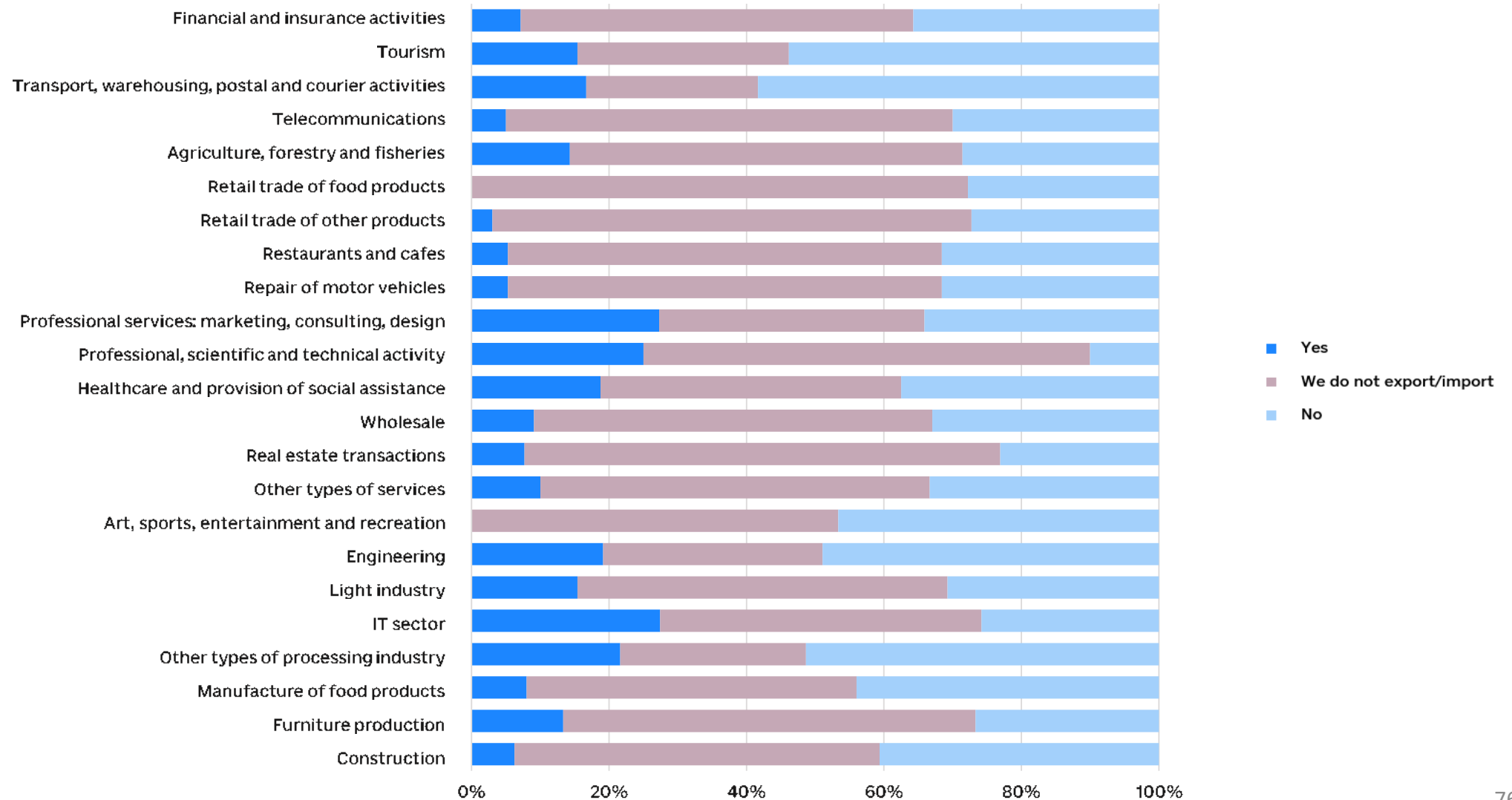


Do you conclude foreign economic contracts by issuing an electronic invoice?

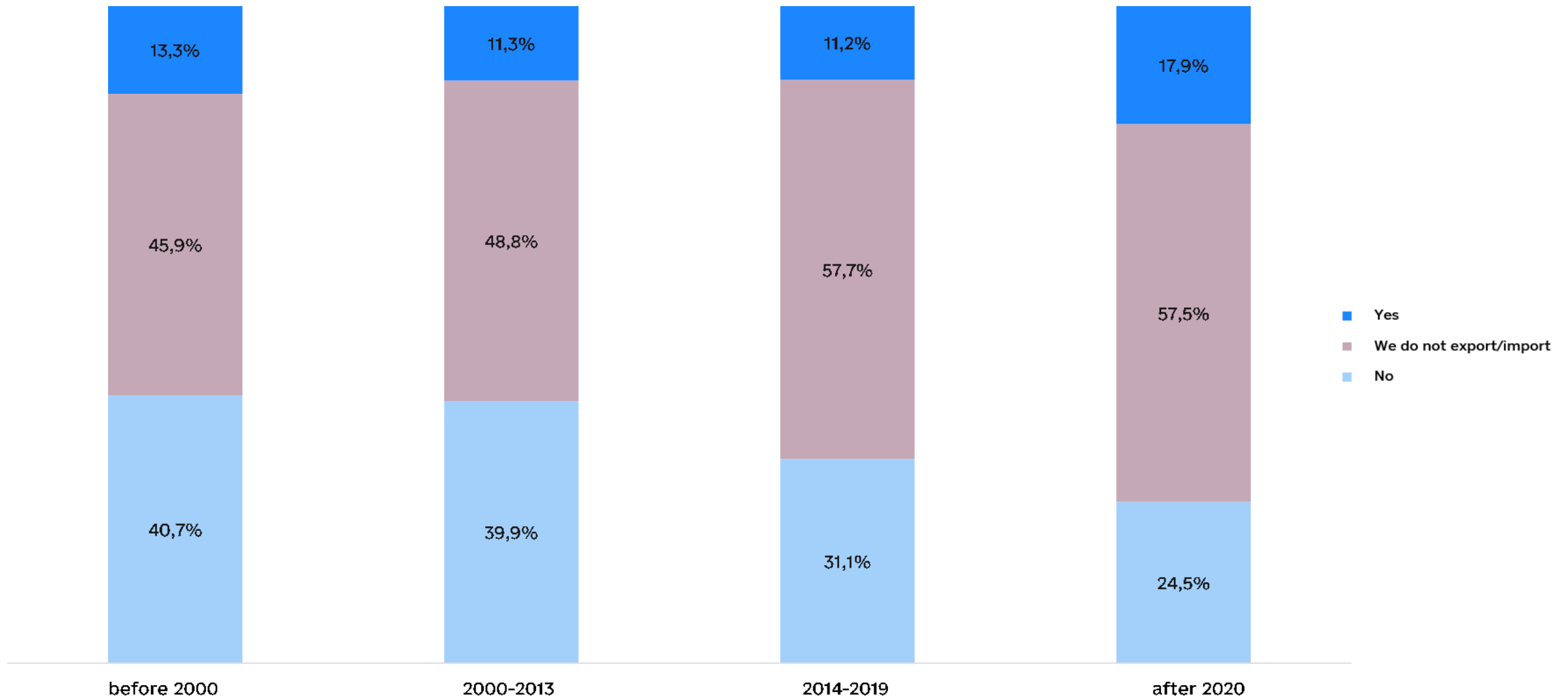
- West
- Volyn region
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- Ivano-Frankivsk region
- Lviv region
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- Vinnitsia region
- Kirovohrad region
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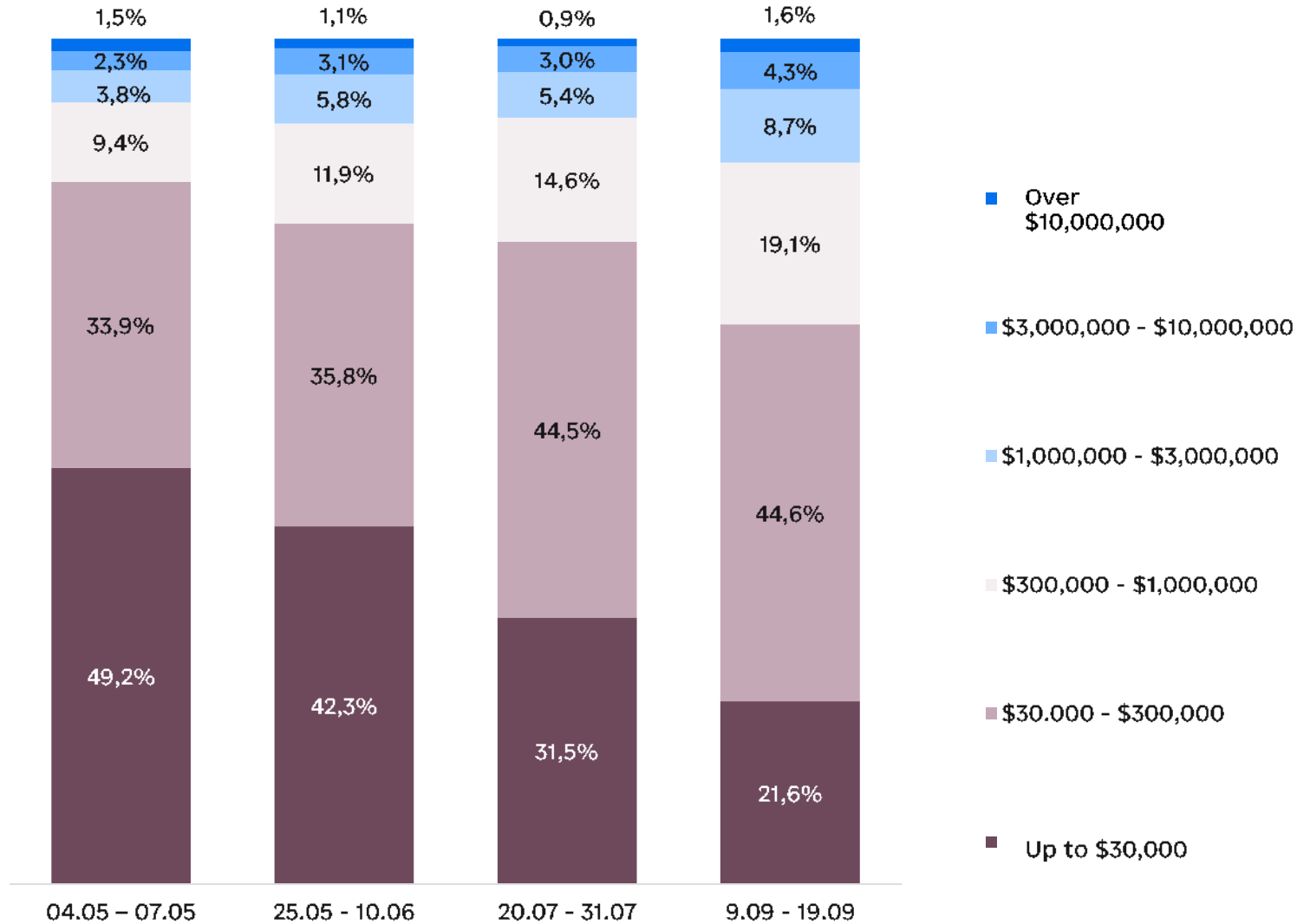
Do you conclude foreign economic contracts by issuing an electronic invoice? (by industry)



Do you conclude foreign economic contracts by issuing an electronic invoice? (year of business establishment)



Business need for financing

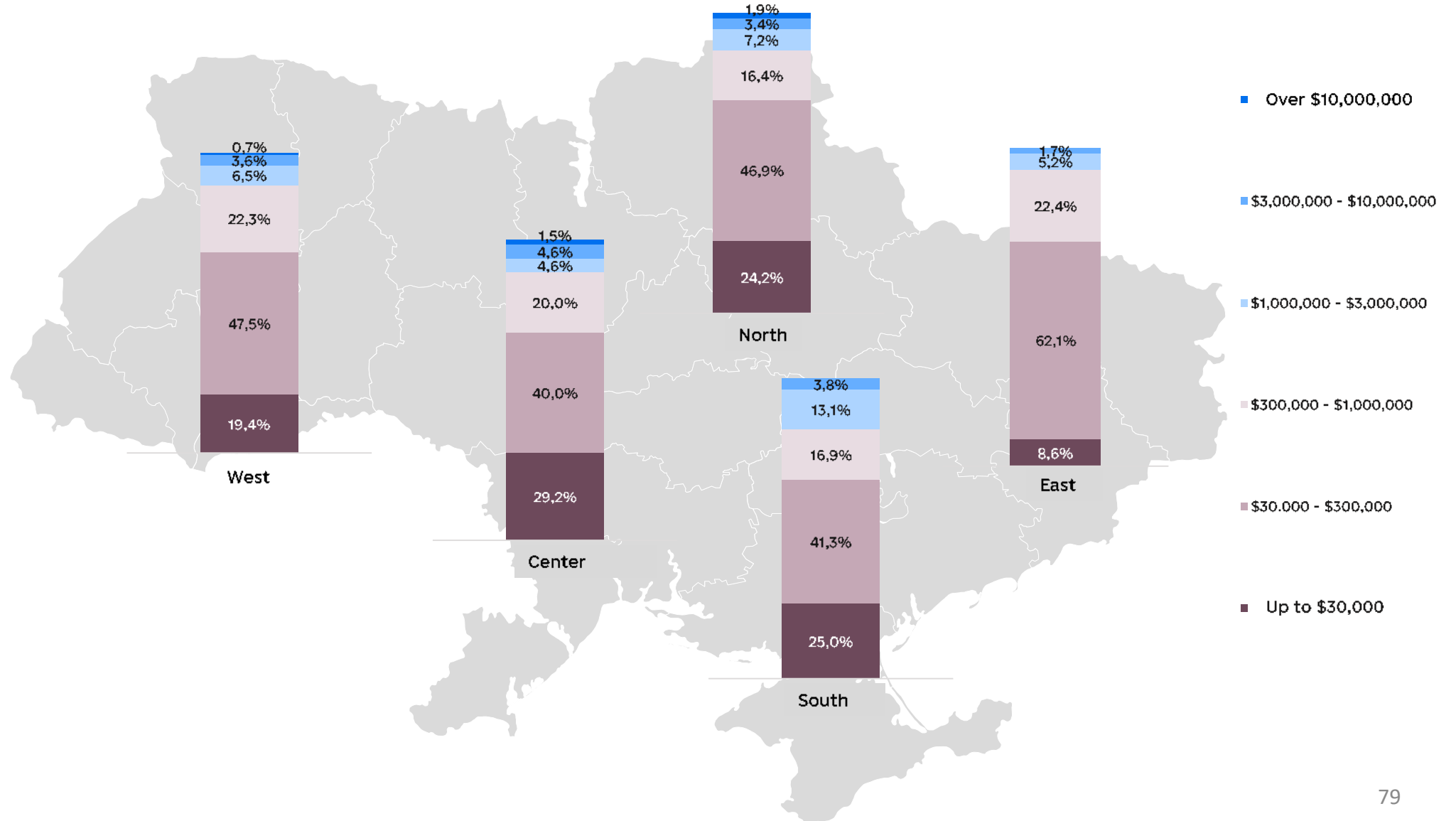


44.6%
need from 1 to 10 million UAH

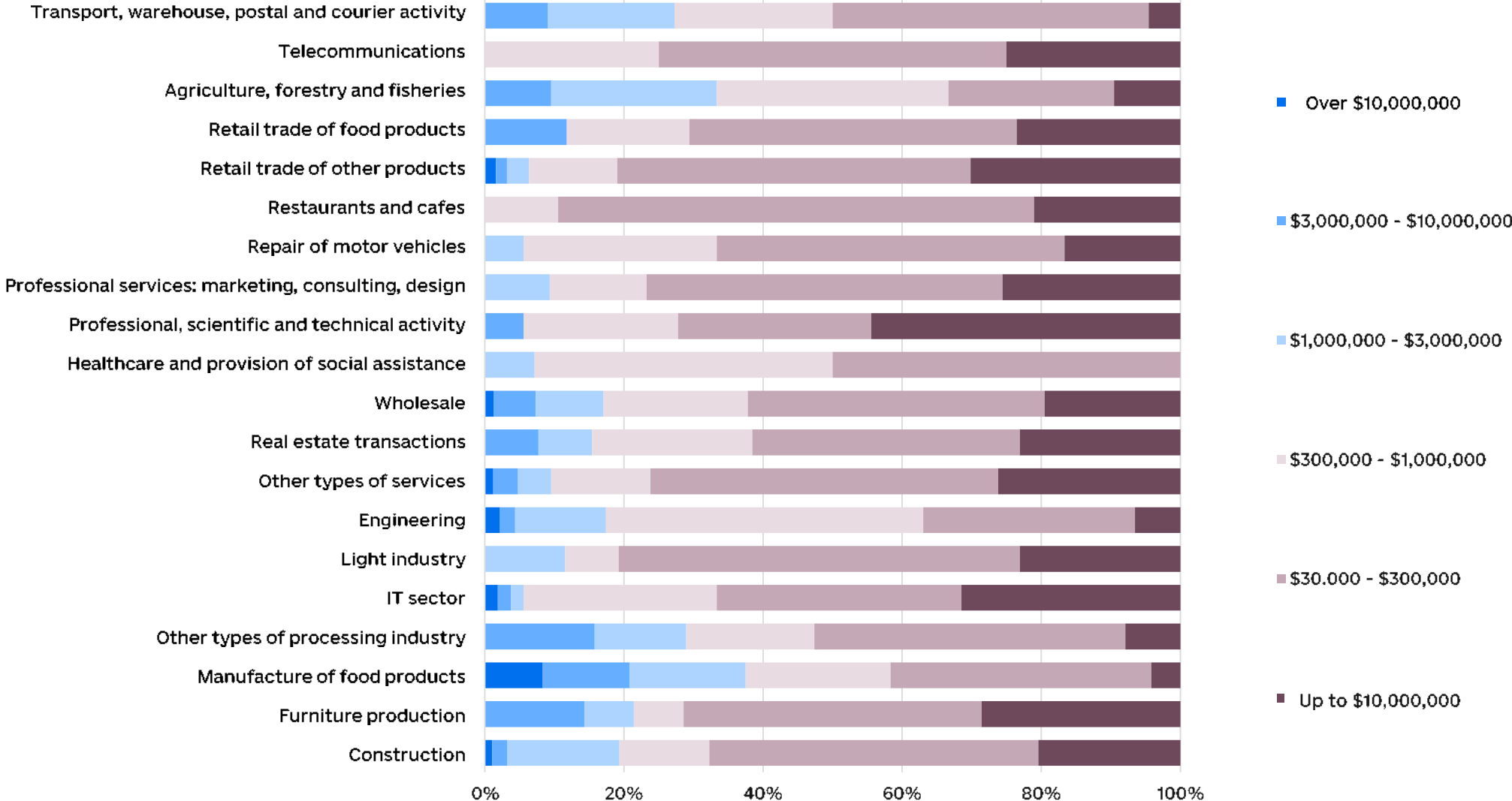
92.8%
need within the limits of the program 0/5-7-9

Business need for financing

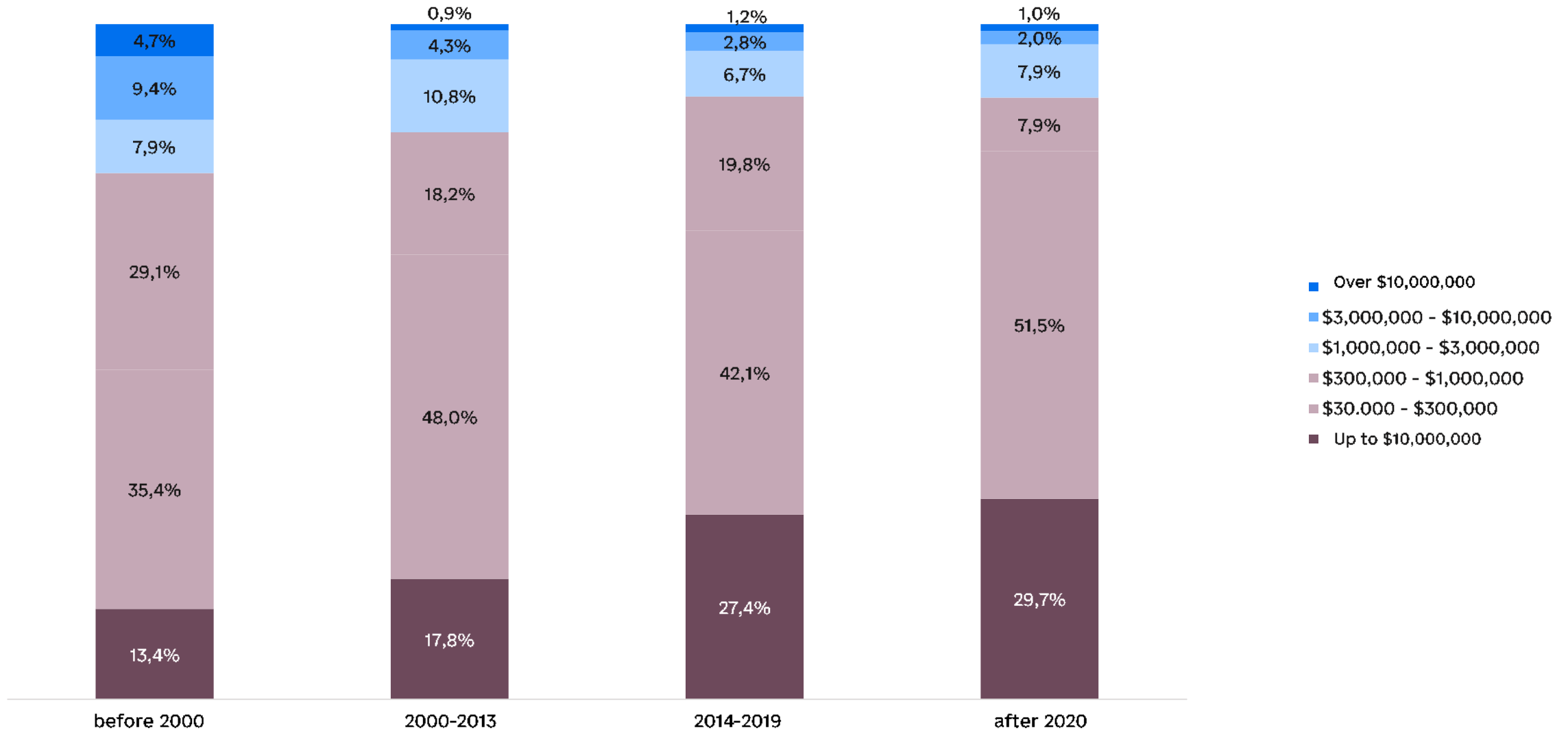
- West
- Volyn region
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- Ivano-Frankivsk region
- Lviv region
- Rivne region
- Ternopil region
- Khmelnytskyi region
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- Kharkiv region
- Center
- Vinnitsia region
- Kirovohrad region
- Poltava region
- Cherkasy region



Business need for financing (by industry)



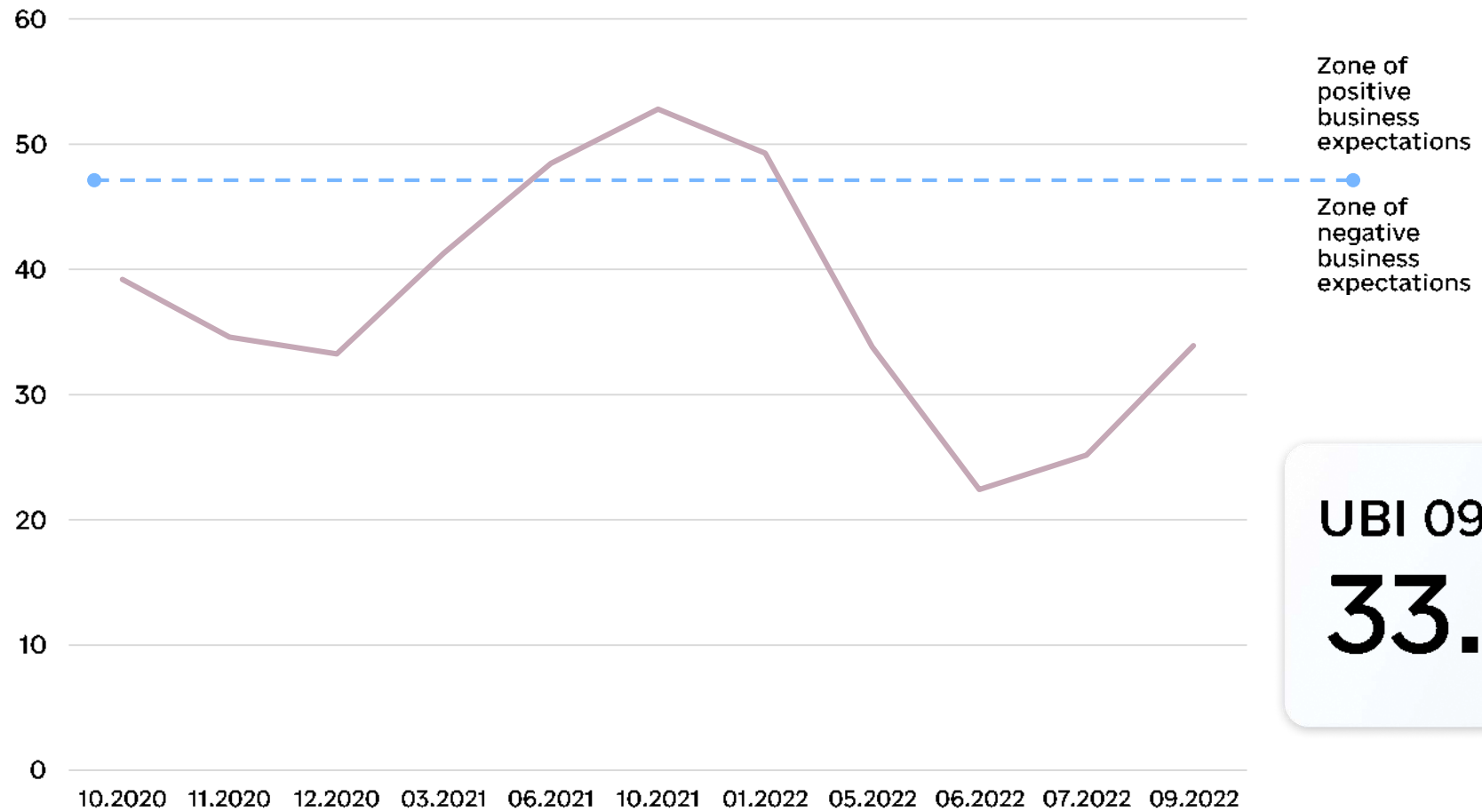
Business need for financing (year of the business establishment)



UBI – Ukrainian Business Index

UBI – Ukrainian Business Index

Maximum
value
100



UBI 09.2022
33.9

Index of business activity – regional cross-section (UBI – Ukrainian Business Index)

Whole Ukraine	35,39	Luhansk region	5,00
Vinnitsia region	34,02	Lviv region	29,79
Volyn region	44,29	Mykolaiv region	25,83
		Odesa region	31,36
Dnipropetrovsk region	33,59	Poltava region	29,88
Donetsk region	19,50	Rivne region	24,44
Zhytomyr region	33,33	Sumy region	37,50
Zakarpattia region	22,50		
Zaporizhzhia region	23,89	Ternopil region	32,78
		Kharkiv region	20,12
Ivano-Frankivsk region	36,77	Kherson region	0,83
Kyiv region	31,29	Khmelnyskyi region	27,40
Kyiv	27,39	Cherkasy region	25,77
		Chernivtsi region	33,61
Kirovohrad region	26,00	Chernihiv region	27,78
		AR Crimea	0,00

Maximum
value

100

UBI 09.2022

33.9

Index of business activity – industrial cross-section (UBI – Ukrainian Business Index)

Agriculture, forestry and fisheries	21,02
Mining and quarrying industry	30,00
Engineering	18,46
Manufacture of food products	35,77
Light industry	41,85
Other types of processing industry	34,47
Supply of electricity, gas, steam and air conditioning	22,92
Water supply, sewage and waste management	22,08
Construction	19,65
Wholesale	34,06
Retail trade of food products	38,89
Retail trade of other products	34,23
Transport, warehousing, postal and courier activities	44,17
Restaurants and cafes	40,26

Hotel business	42,50
IT sector	35,87
Telecommunications	28,10
Financial and insurance activities	30,00
Real estate transactions	19,23
Professional, scientific and technical activity	23,88
Media	22,86
Professional services: marketing, consulting, design	44,67
Activities in the field of administrative and auxiliary services	25,42
Repair of motor vehicles	21,58
Education	25,71
Healthcare and provision of social assistance	39,22
Arts, sports, entertainment and recreation	27,50
Other types of services	26,77

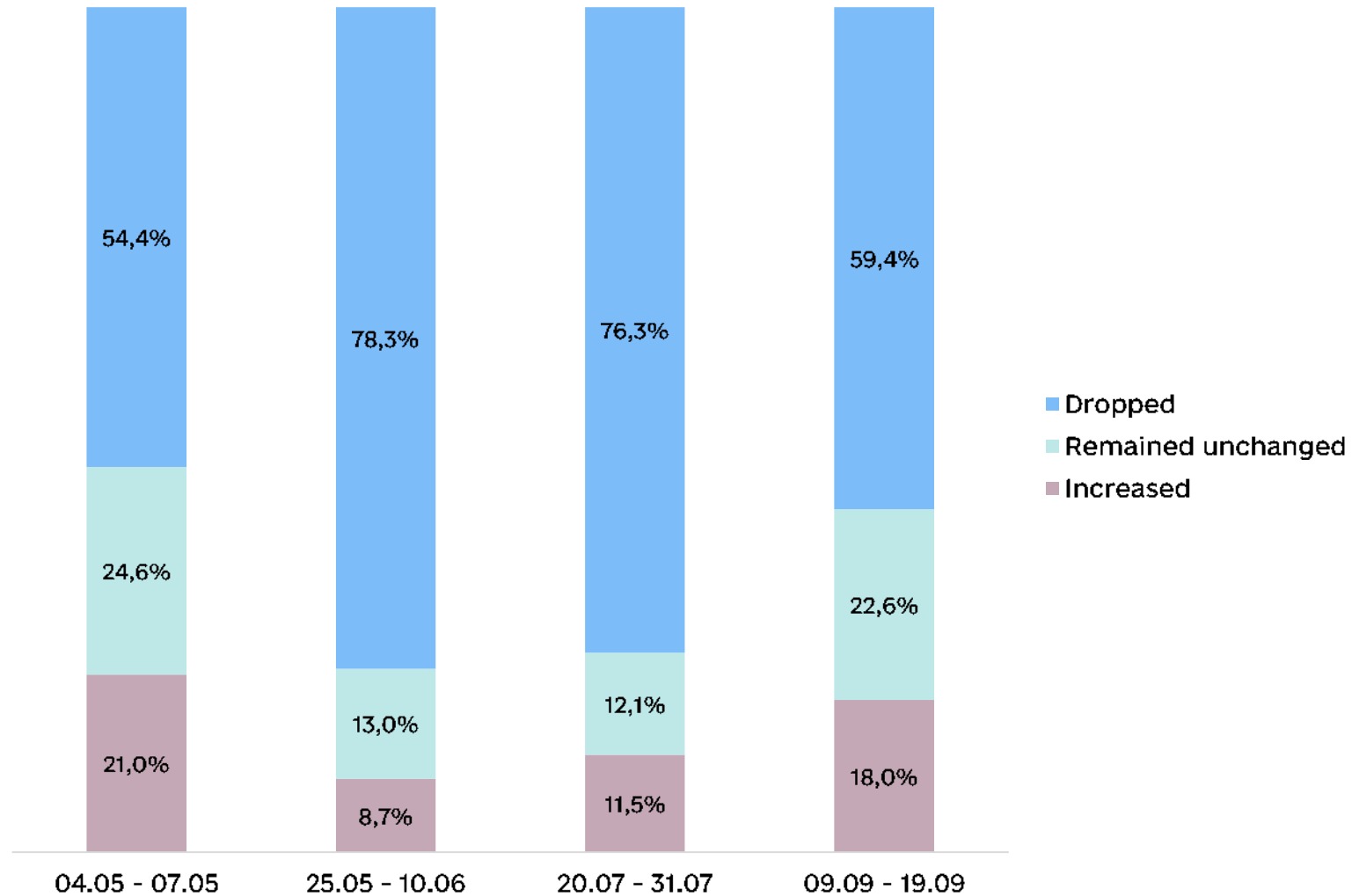
Maximum
value

100

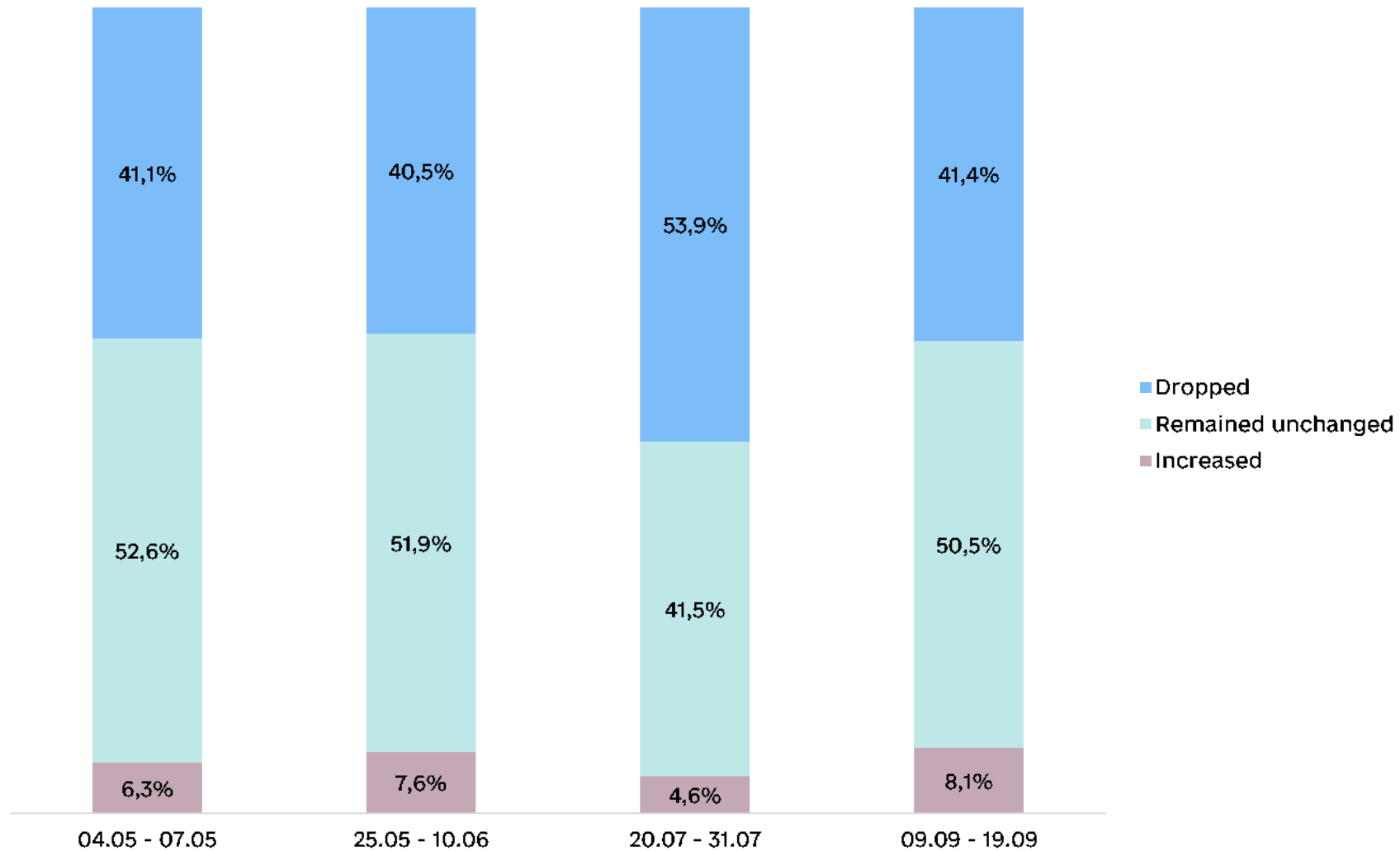
UBI 09.2022

33.9

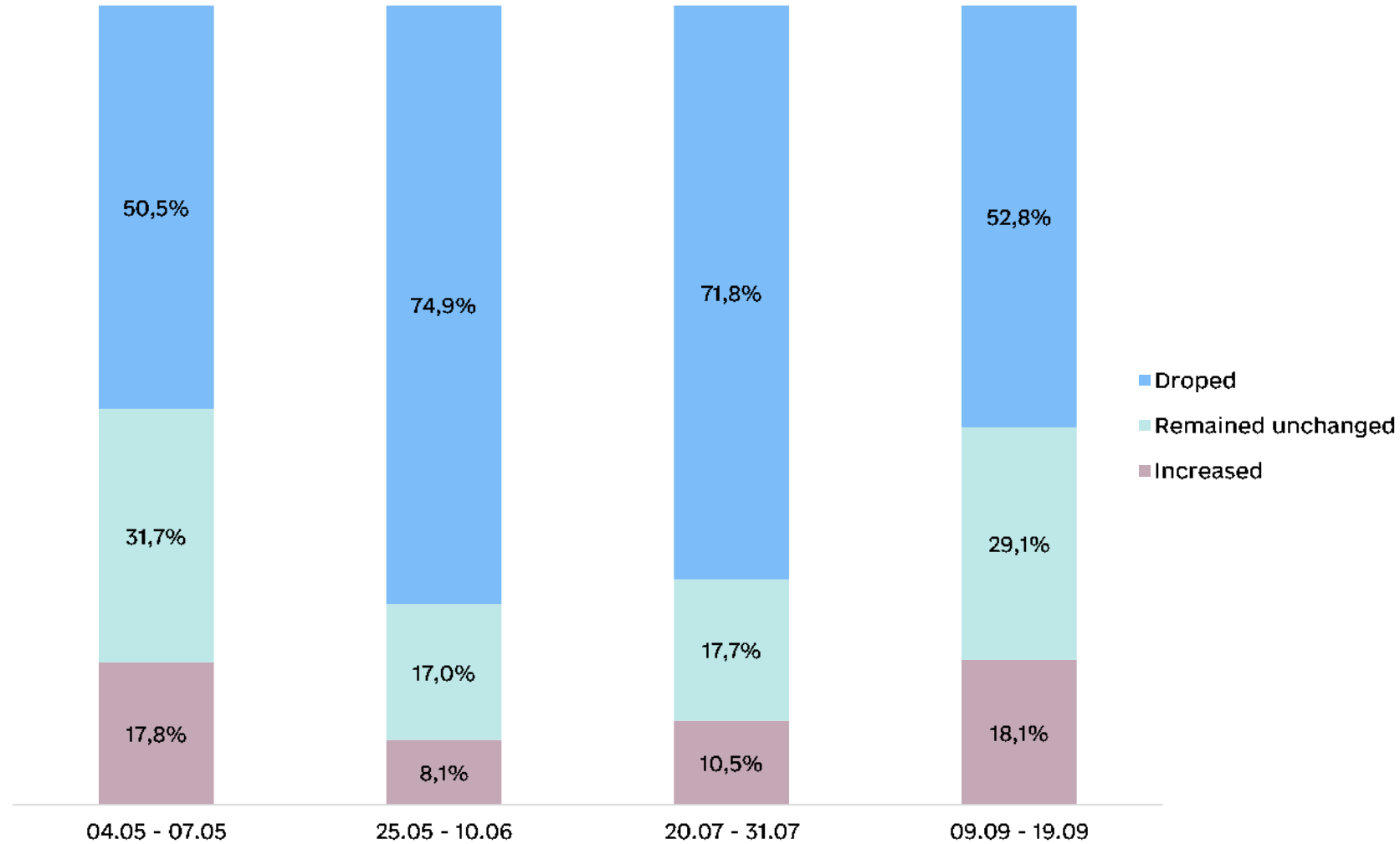
How has the number of customer orders received by the business changed over the past month?



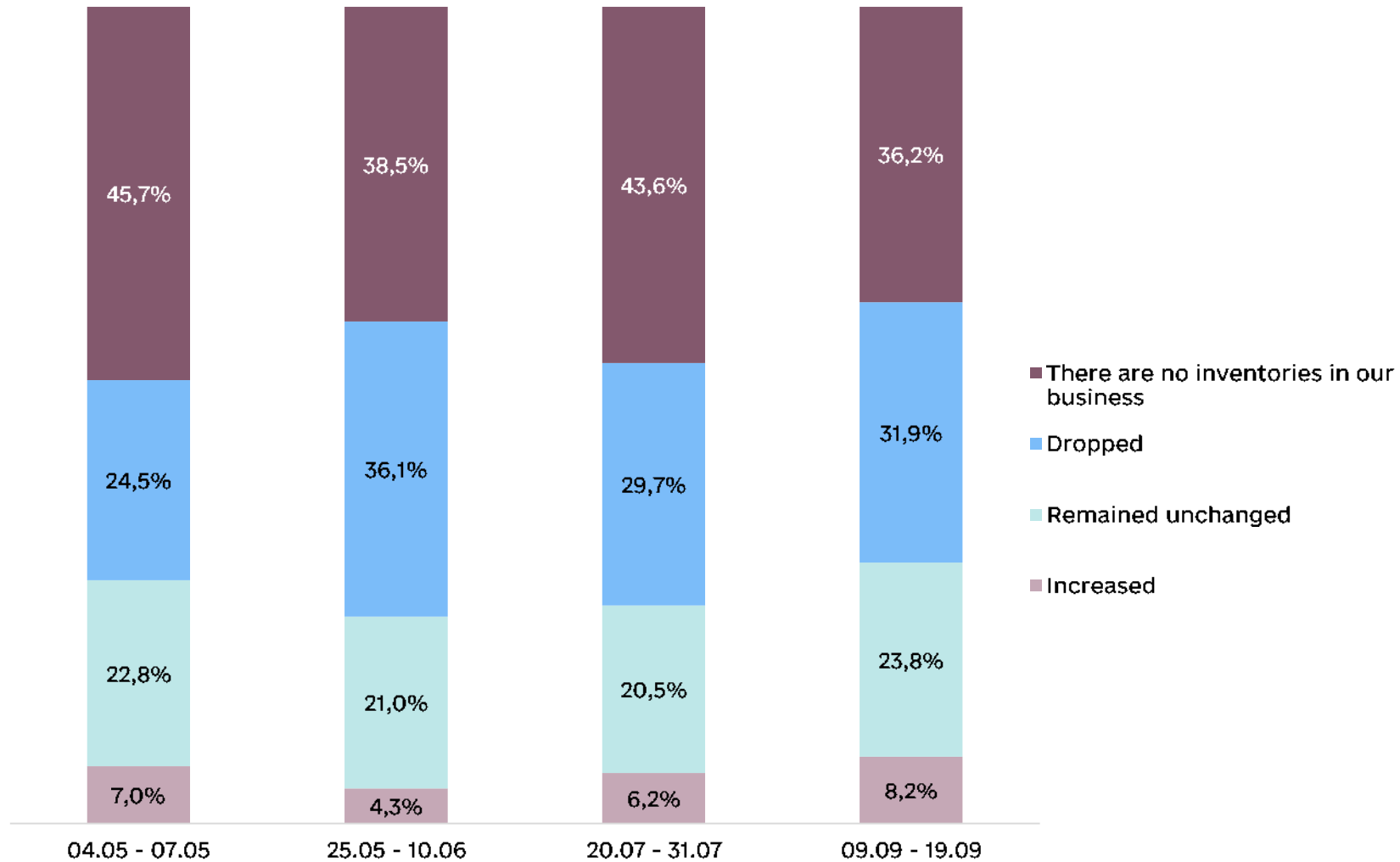
How has the number of employees (full-time and part-time) changed over the past month?



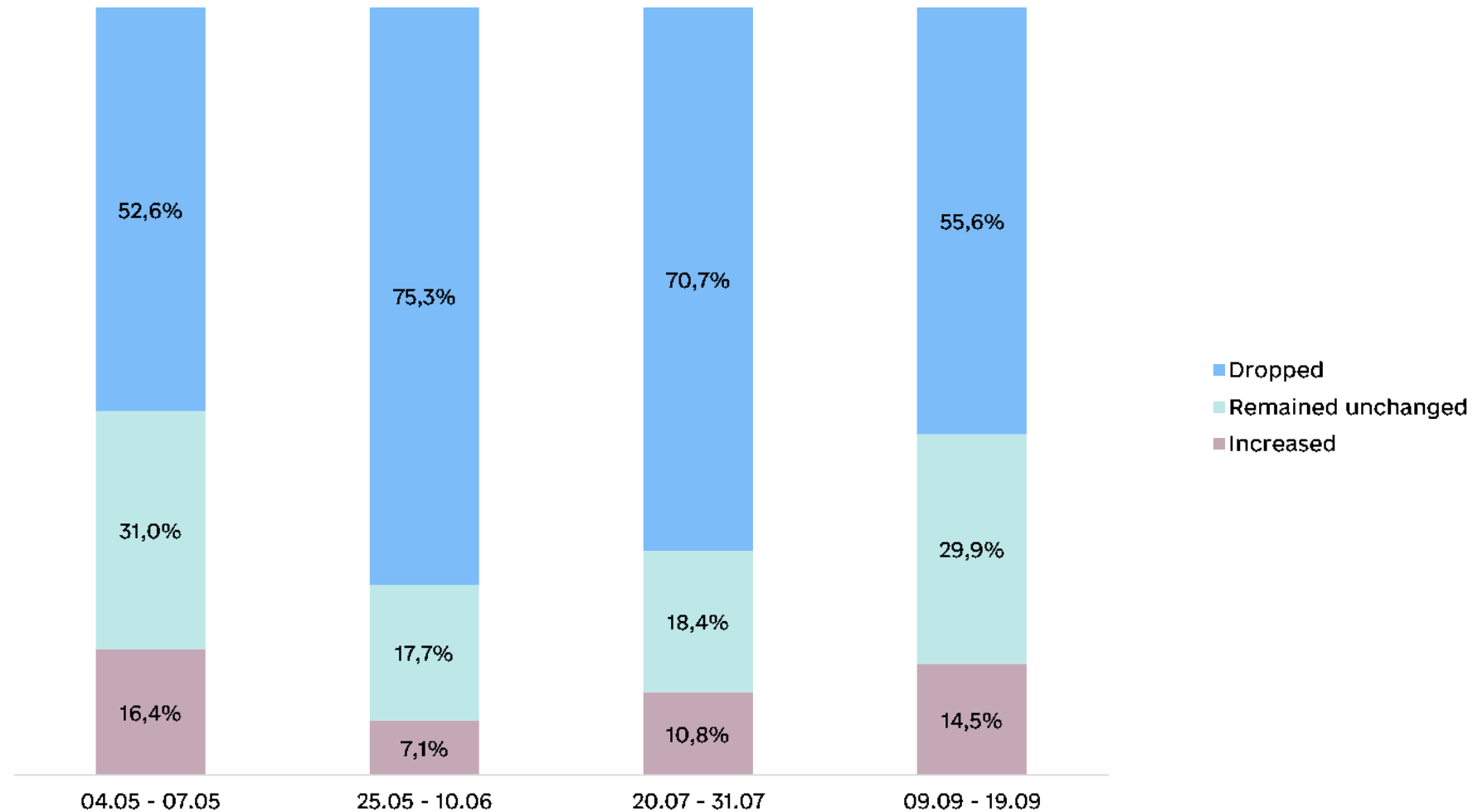
How has the volume of output of products/provided services changed over the past month?



How has the overall inventory level changed over the last month?

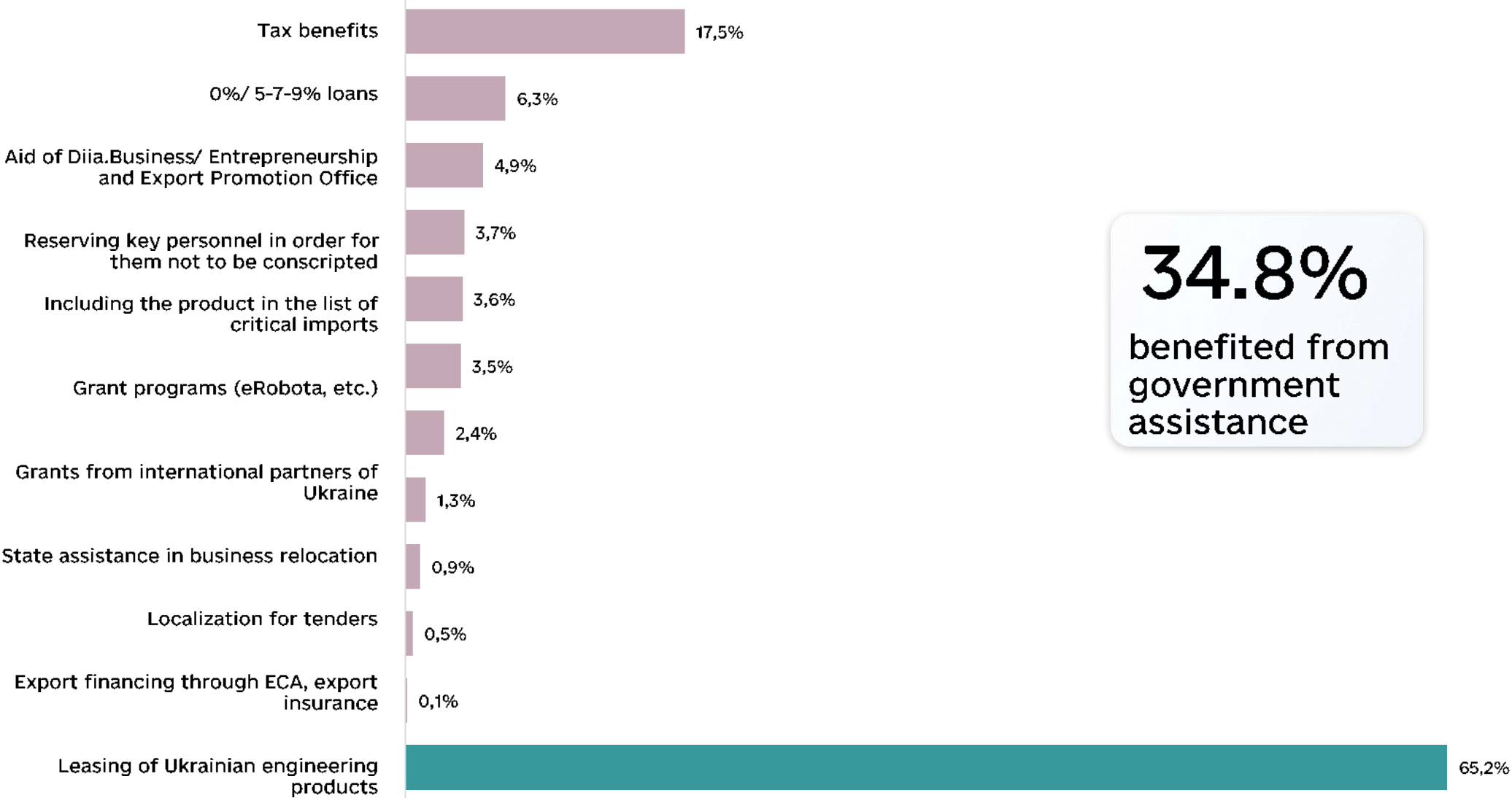


How has the number of your orders to your suppliers changed over the past month?

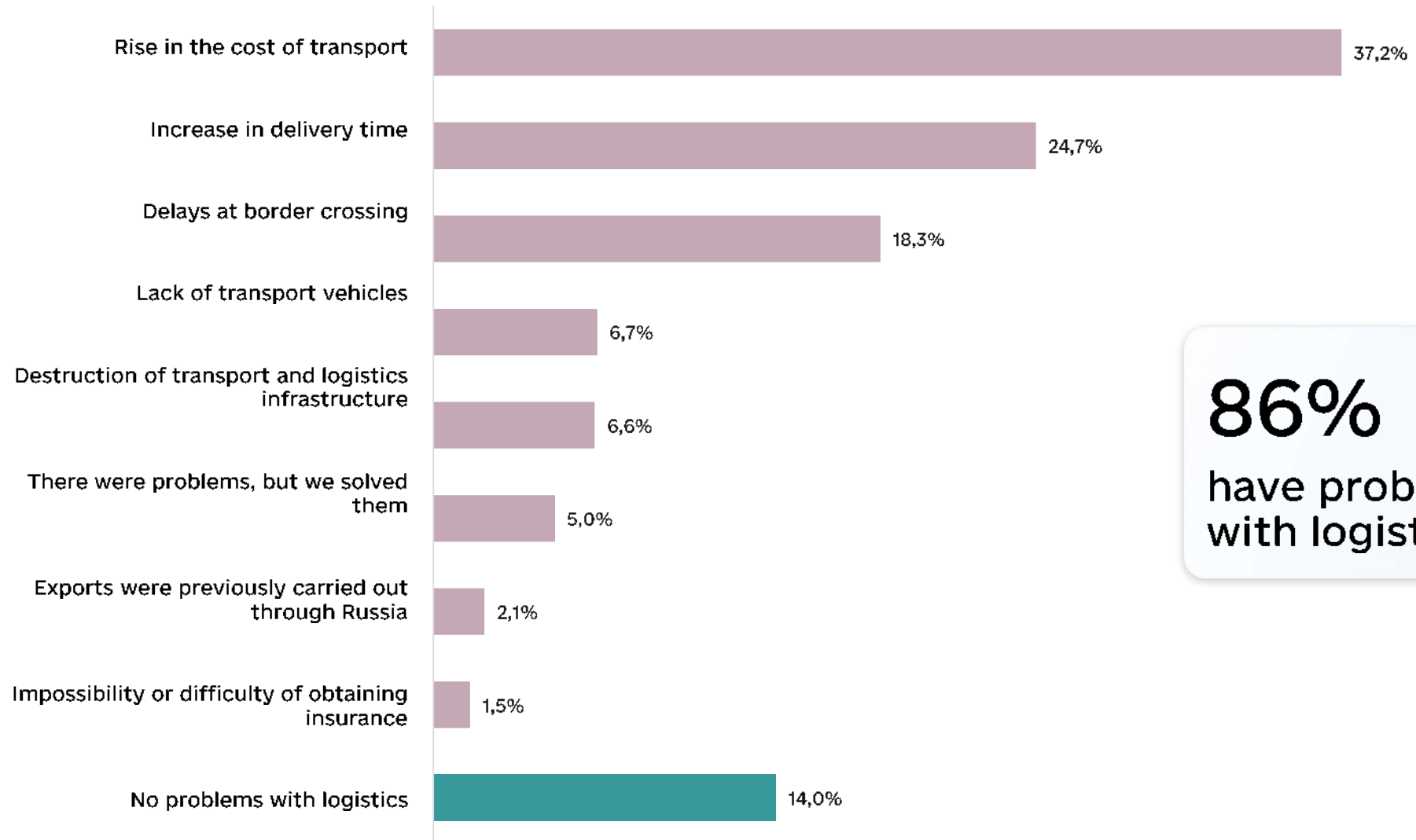


Problems and solutions

What types of government assistance have you used since 24.02?



What logistical problems do you face when exporting? (TOP-3 options)

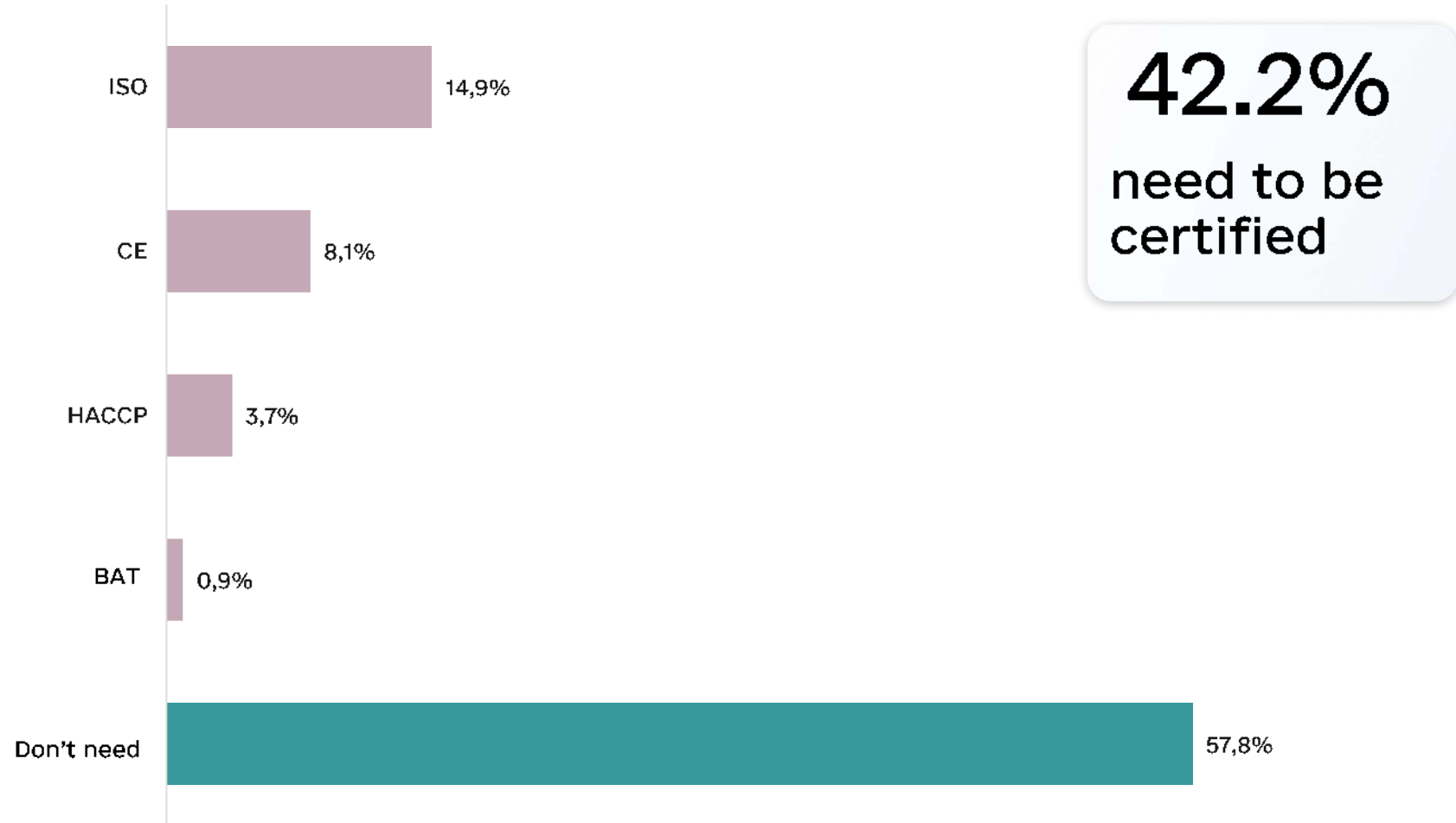


86%
have problems
with logistics

What problems do you see for the conclusion and execution of a foreign economic contract in electronic form or by issuing an electronic invoice?



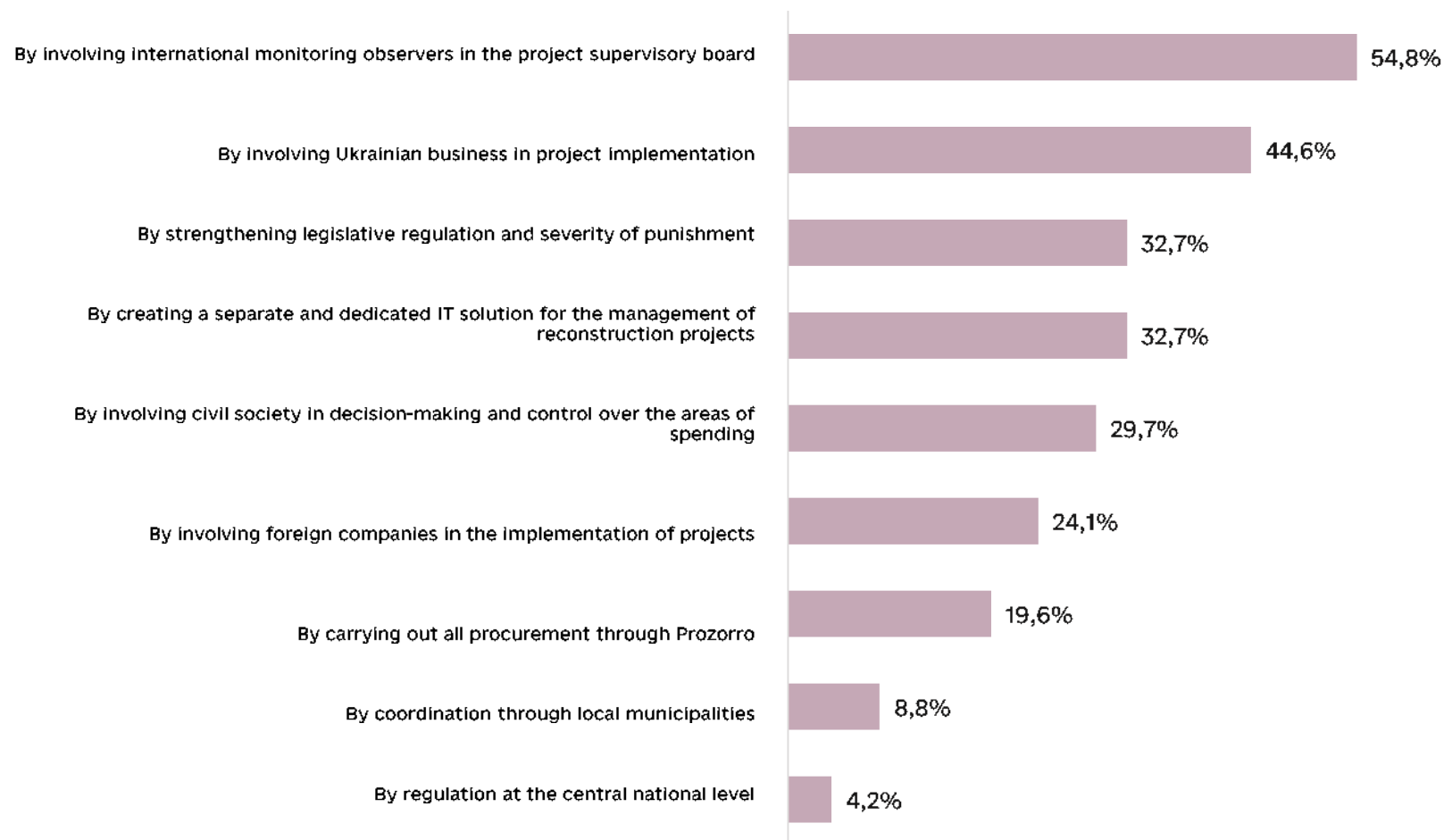
What certification does your company need for export?



What do you think should be simplified in the legislation on certification?



How, in your opinion, can transparency and efficiency of spending on the reconstruction of the country be ensured? (choose TOP 3 main ones)



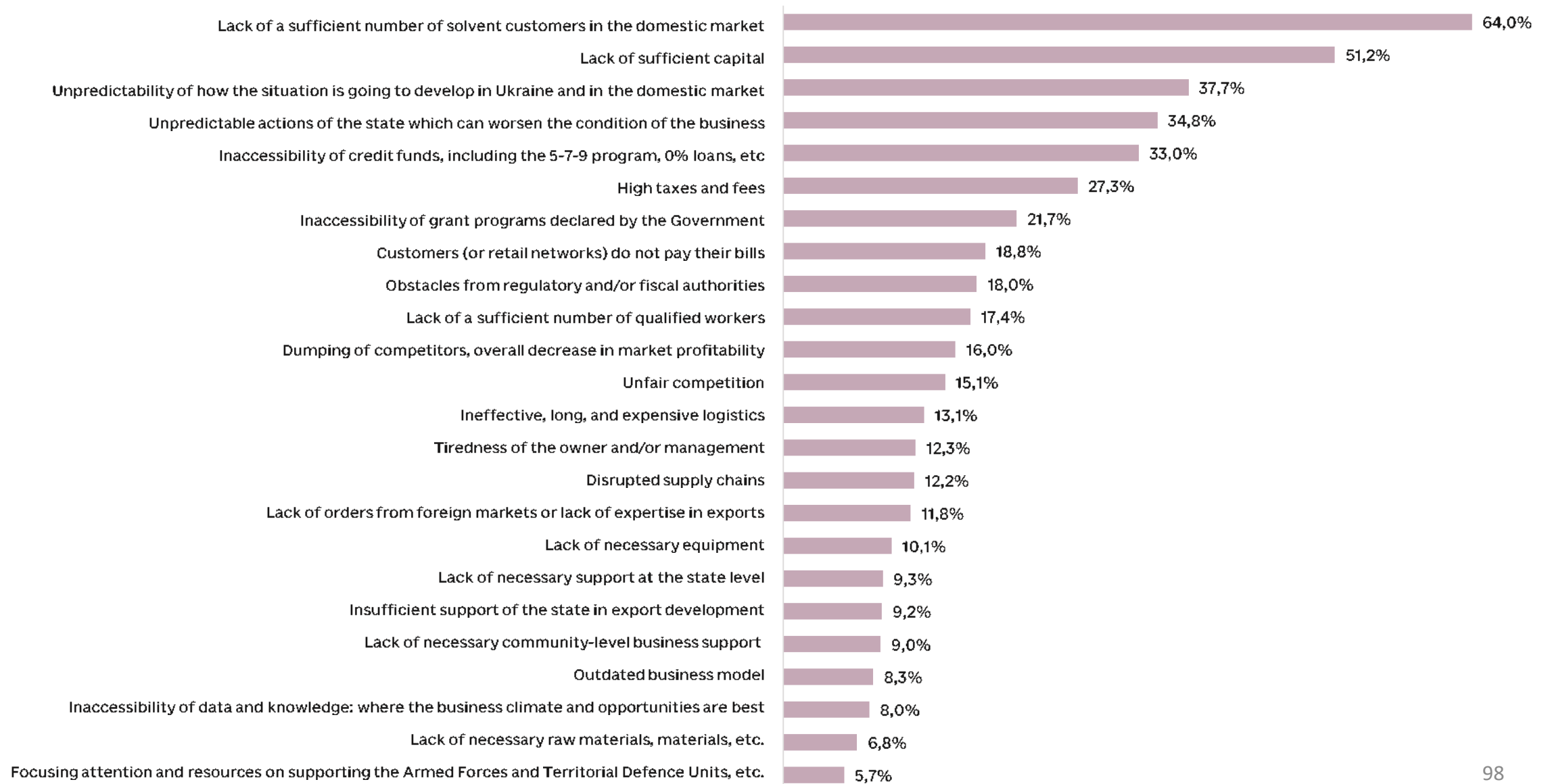
54.8%

Involvement of international observers

44.6%

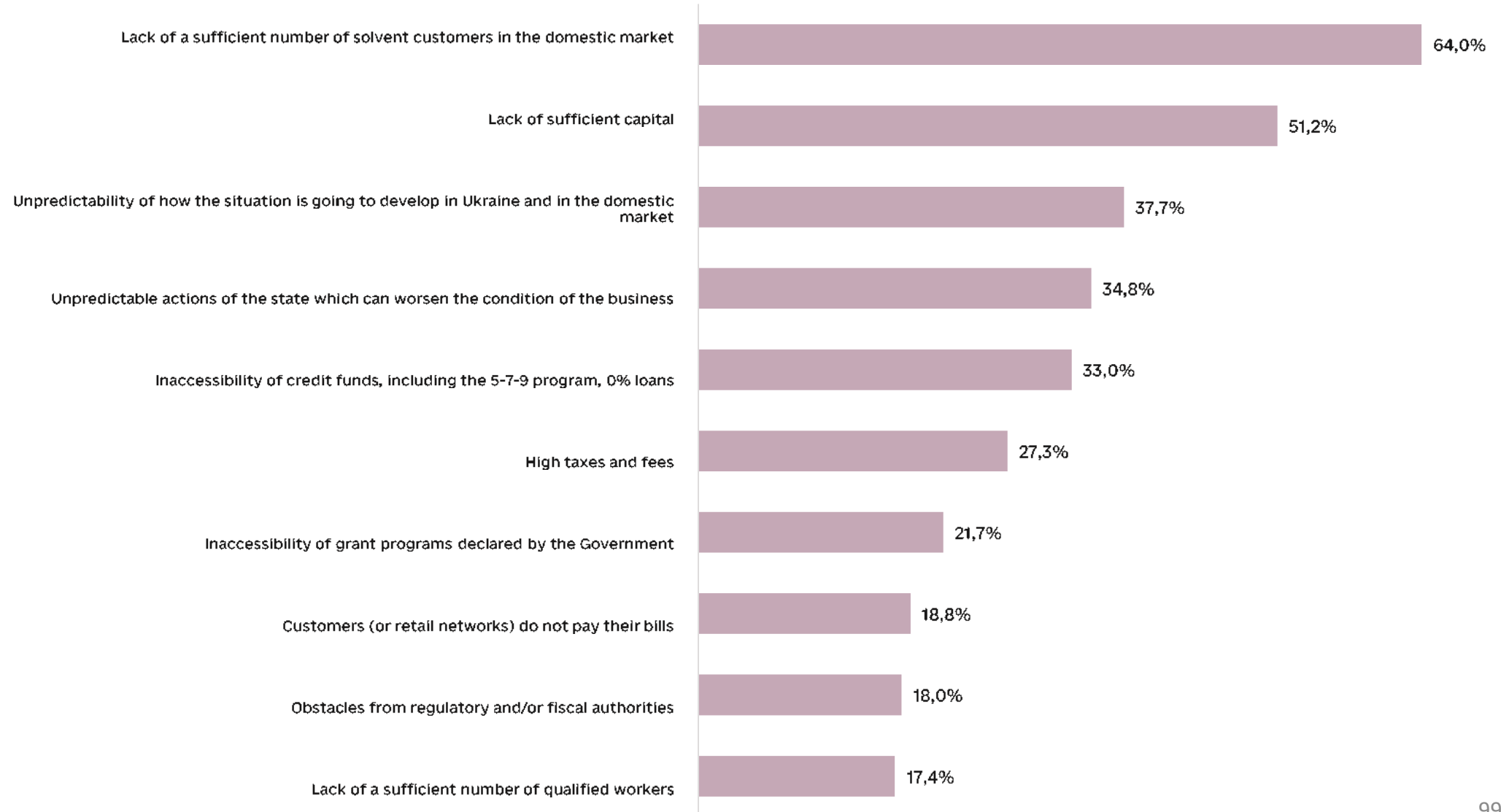
Involvement of Ukrainian business

What prevents you from restoring and developing your business now?

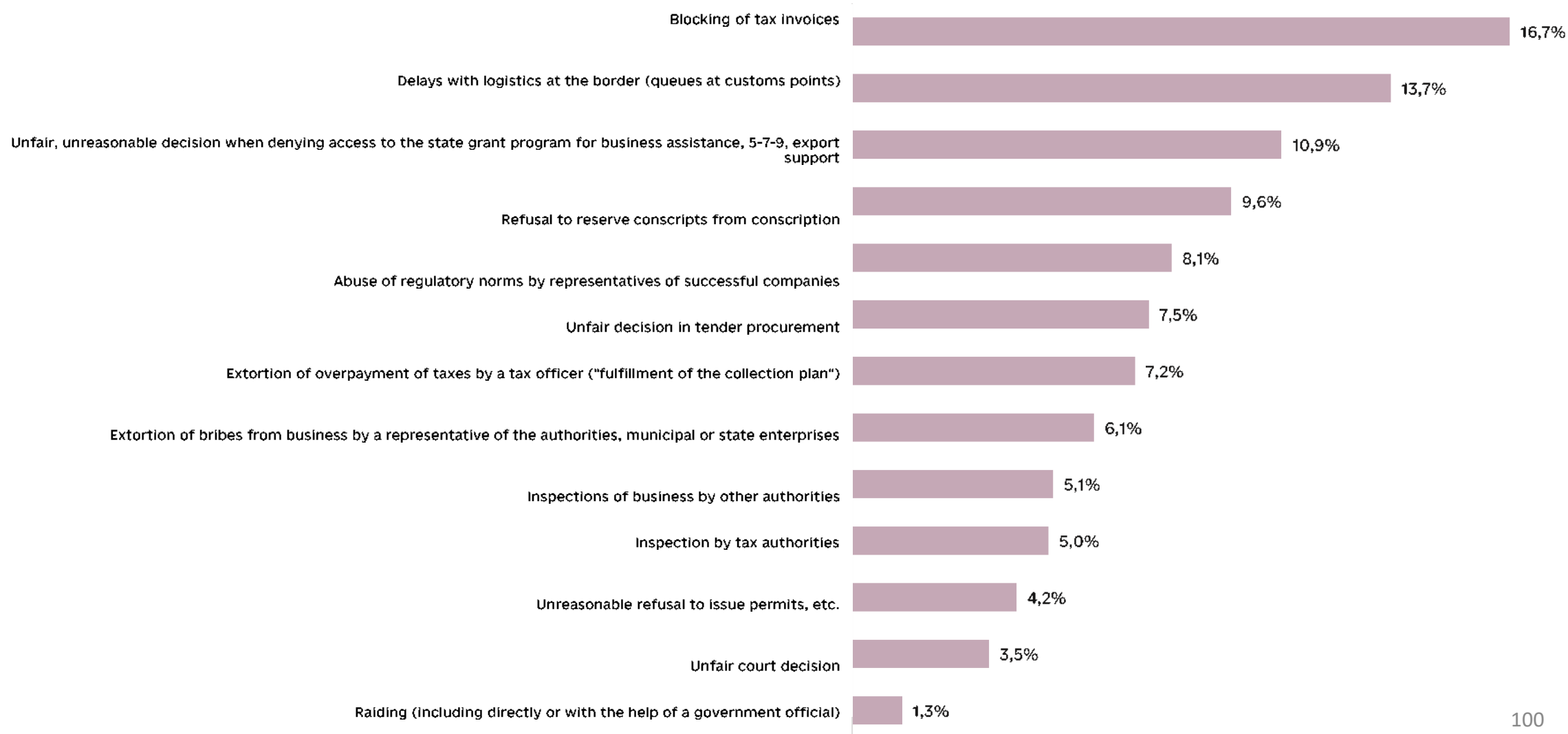


What prevents you from restoring and developing your business now?

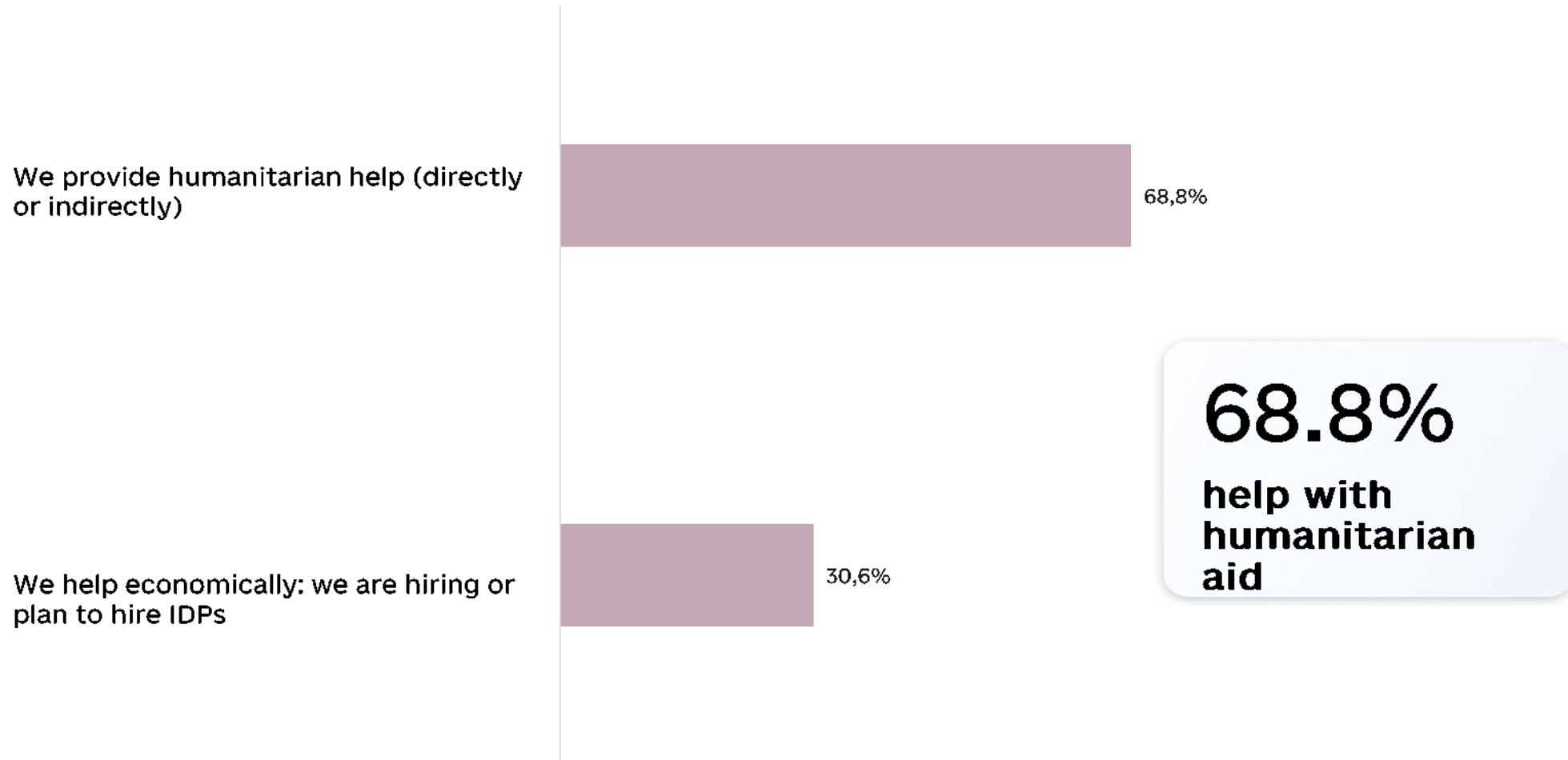
Top 10 issues



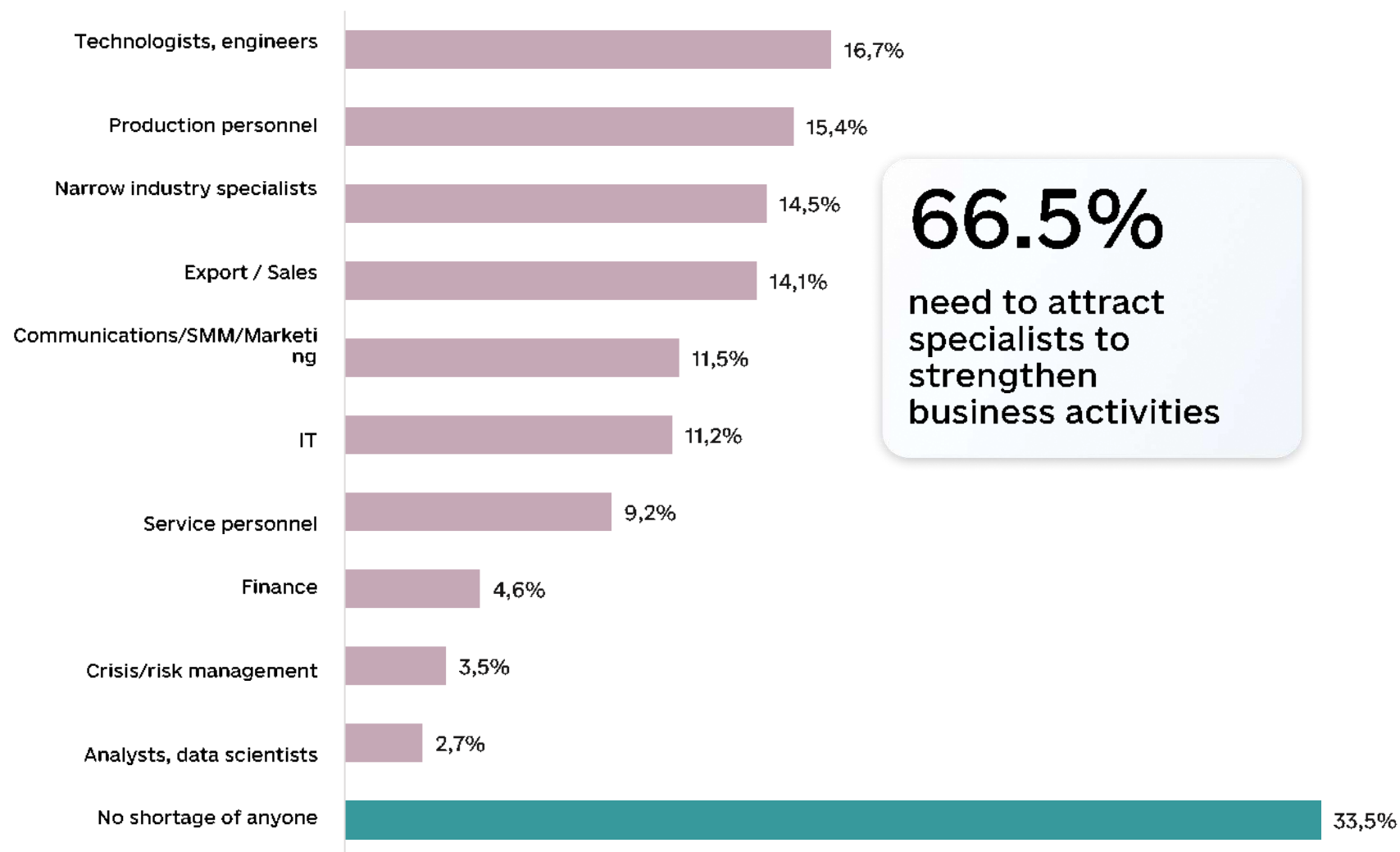
What problems in relations with the authorities did your business face in the last 2 months?



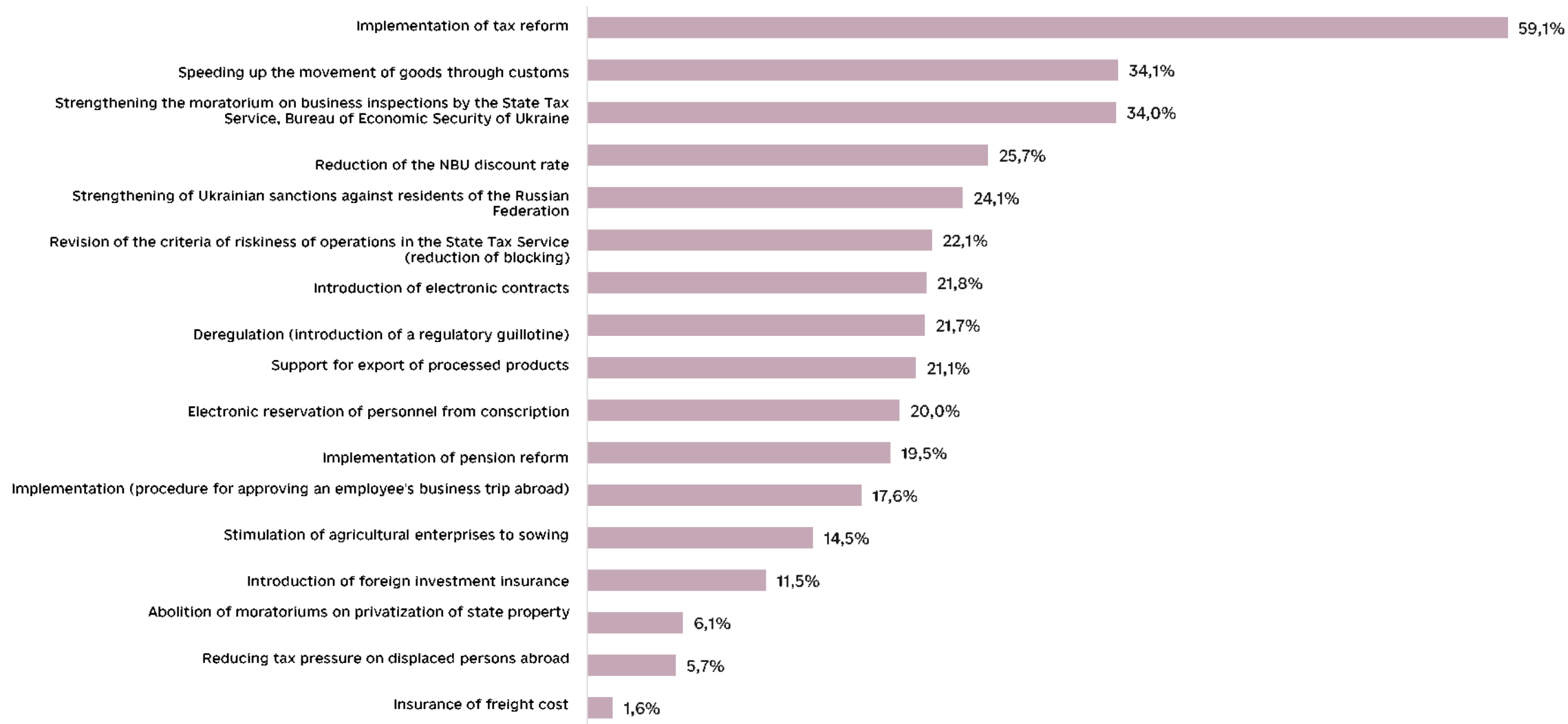
What is your business attitude towards internally displaced persons (IDPs)?



What specialists do you lack now to strengthen business activities in Ukraine?



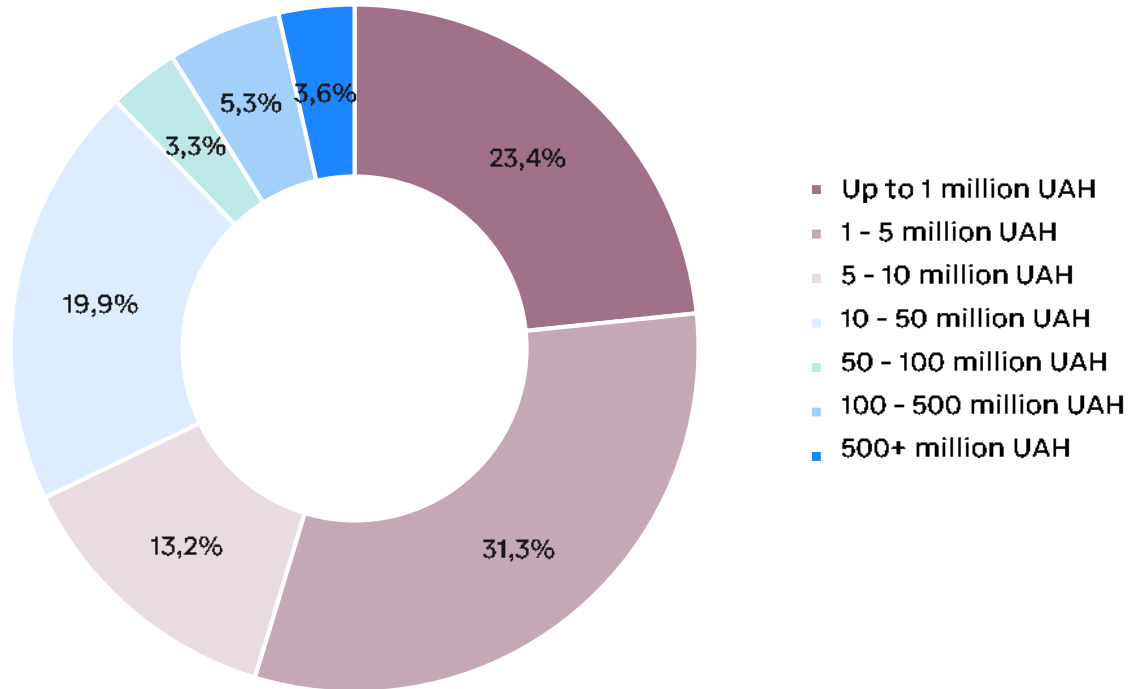
Which of these tasks are the most important for the economic block to solve and implement (TOP-5)



Passport block

8th wave of research

Business turnover in 2021



Survey geography, Wave 8. Region of main business activity

Whole Ukraine	22,1%
Vinnitsia region	2,7%
Volyn region	1,6%
Dnipropetrovsk region	8,0%
Donetsk region	1,7%
Zhytomyr region	1,7%
Zakarpattia region	1,5%
Zaporizhzhia region	4,2%
Ivano-Frankivsk region	2,8%
Kyiv region	7,0%
Kyiv	13,6%
Kirovohrad region	1,2%
Luhansk region	1,0%
Lviv region	5,6%
Mykolaiv region	2,1%
Odesa region	4,1%
Poltava region	2,4%
Rivne region	1,0%
Sumy region	1,9%
Ternopil region	1,0%
Kharkiv region	4,9%
Kherson region	1,4%
Khmelnyskyi region	2,8%
Cherkasy region	1,5%
Chernivtsi region	1,0%
Chernihiv region	1,0%
AR Crimea	0%

Structure of macro-regions

- West
- Volyn region
- Zakarpattia region
- Ivano-Frankivsk region
- Lviv region
- Rivne region
- Ternopil region
- Khmelnytskyi region
- Chernivtsi region
- South
- AR Crimea
- Dnipropetrovsk region
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- Mykolaiv region
- Odesa region
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- Donetsk region
- Luhansk region
- Kharkiv region
- Center
- Vynnytsia region
- Kirovohrad region
- Poltava region
- Cherkasy region



Industries of respondents

Agriculture, forestry and fisheries	2,5%
Mining and quarrying	0,2%
Engineering	5,4%
Manufacture of food products	3,0%
Light industry	3,1%
Furniture production	1,9%
Other types of processing industry	4,4%
Supply of electricity, gas, steam and air conditioning	0,7%
Water supply, sewage and waste management	0,7%
Construction	11,5%
Wholesale	10,2%
Retail trade of food products	2,1%
Retail trade of other products	7,9%
Transport, warehousing, postal and courier activities	2,8%
Restaurants and cafes	2,2%
Hotel business	0,2%
Tourism	1,5%
IT sector	7,3%
Telecommunications	2,4%
Financial and insurance activities	1,6%
Real estate transactions	1,5%
Professional, scientific and technical activity	2,3%
Media	0,8%
Professional services: marketing, consulting, design	5,2%
Activities in the field of administrative and auxiliary services	0,7%
Repair of motor vehicles	2,2%
Education	0,8%
Healthcare and provision of social assistance	1,9%
Arts, sports, entertainment and recreation	1,7%
Other types of services	11,1%

Center for
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Дія Бізнес

Advanter

