

Ukrainian Business Outlook

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Spanish business among the members



**SPAIN TOOK 8TH PLACE OUT OF THE TOP-10
COUNTRIES TO WHICH UKRAINE EXPORTED IN
2022 (\$1,6 BLN)**

Business sentiments (based on the EBA research)

83%

of businesses are ready to join post-war reconstruction of Ukraine

99%

of EBA companies plan to continue operating in the Ukrainian market in 2023

63%

are going to invest in Ukraine even in wartime

46%

of CEOs believe that it will not undergo significant changes but 22% predict an improvement

Half of the top managers consider the investment climate rather unfavourable.

The most popular sectors for investment remain agriculture, IT, pharma, transport, and FMCG.



WORK OF COMPANIES

of companies work in full



work with restrictions



do not work



limited the geography of activities



work online



closed some offices/outlets/branches



SALARIES

pay full salary



pay extra money



reduced salaries



sent employees on unpaid leave



laid off staff



ARMY SUPPORT AND HUMANITARIAN AID

help financially



support mobilized workers



supply products



provide services



supply medicines



supply means of protection/defense



FINANCIAL RESILIENCE

have financial reserves for several months



for six months



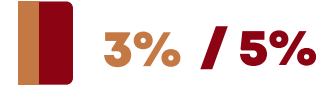
for a year



for more than a year



have no financial reserves left



WAR-INDUCED LOSSES

Up to 500 thousand dollars



500 thousand - 1 million dollars



1 million - 10 million dollars



More than 10 million



MOBILIZED EMPLOYEES

Up to 10% of conscripts



10-20%



20-30%



30-40%



Investment dynamic



Over six months, the number of those who consider the investment climate to be extremely unfavorable has slightly decreased from 53% to 37%.

Investment stories even during the war



Kingspan plans to invest 200 million euros in constructing a technological hub of building materials in Ukraine



Food giant Nestle is investing \$43 million in a new food production facility in western Ukraine and is expected to add 1,500 jobs.



Bayer plans to invest 60 million euros in boosting the capacity of the company's seed processing facility in Ukraine's Zhytomyr region.



Lemtrans (and Levada-Cargo (subsidiary company)) invested \$8+ mln in 2022 into the building and developing of infrastructure projects.



KERNEL



USAID, Grain Alliance, "Kernel" and "Nibulon" invest \$44 million in export logistics of Ukraine.



Unilever will invest \$20 mln to build a new factory.

INVESTMENT MAP OF UKRAINE IN TERMS OF REGIONS



116 projects

43% - PROJECTS FROM BUSINESS

57% - FROM THE MUNICIPALITIES

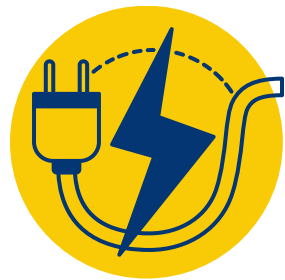
14 industries

around 1,8 bln USD

INVESTMENTMAP.COM.UA

WELCOME TO INVEST IN UKRAINE

Main challenges that businesses face



Impossibility to plan for mid-term



The difficulty for males to leave Ukraine even short-term business trip + mobilization (83% businesses has mobilized workers)



Logistics (crossing the border with the EU, blockage of ports (only grain corridor functions), blocking of export by some countries)



Migration (nowadays 7-8 mln people left Ukraine)



No risks insurance to enable investments from the private sector

Why Ukraine is an interesting place for business



Geographical position close to the EU
(Most major destinations in Europe can be reached in two days by truck from Ukraine)



The fastest business registration in the world – 2 seconds to become an entrepreneur in Ukraine, and 30 minutes to found a limited liability company



70% of Ukrainians have secondary or higher education



Fiscal system that is rather competitive, still, yes, the question is administration



Rebuiding potencial of around \$415 bln



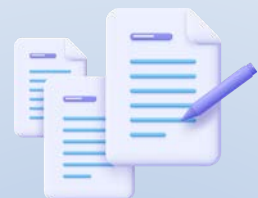
Ukraine has 33% of the world's black soil



DIGITALIZATION:
the first country with a valid digital ID - Mobile application Diia, cashless (for example, for payments in trade networks - 52.3%), online banking



PERSPECTIVE SECTORS TO BE
in logistics and infrastructure, construction, energy & green energy, agri& food, IT& creative industires, defence, and more.



Ukraine has 19 FTAs with 47 countries, including DCFTA with the EU



117 types of minerals found in Ukraine

How can we bring more value to your business during the rebuilding process?



If your business is already in Ukraine:
Give high-level advocacy, individual and professional development for your employees, networking and more.
www.eba.com.ua



- If your business not present in Ukraine yet:
1. Give fast and comprehensive access to regularly updated information on doing business in Ukraine.
 2. Give access to the network that will help to find partners, clients, and stakeholders in Ukraine.
 3. Support in making the right decision on investments or further development.

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