

Cite This Article:

Shevtsova A. Z., Braslavska O.V. Research preconditions of Ukrainian chemical industry modernization based on the assessment competitiveness of its potential [Online] // *Economic Processes Management: International Scientific E-Journal*. 2016. 1. Available: http://epm.fem.sumdu.edu.ua/download/2016_1/2016_1_12.pdf

Received
11.01.2016

Accepted
21.01.2016

УДК 65.012:66(477)

JEL Classification: L52, L65

**RESEARCH PRECONDITIONS OF UKRAINIAN CHEMICAL INDUSTRY
MODERNIZATION BASED ON THE ASSESSMENT COMPETITIVENESS
OF ITS POTENTIAL**

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The article analyzes the potential of the Ukrainian modern chemical industry and its main actors – enterprises producing large-base chemical products. Studying the potential competitiveness of industry and businesses conducted based on evaluation of its key components. The factors that led deterioration of the competitive position of basic industries are revealed. It is concluded that in the context of limited investment resources first phase of the neo industrial model should be linked to supporting processes of technical and technological modernization and efficient use of the existing potential on traditional chemical production. This approach should provide resources and create an active innovative environment for the production development of innovative chemical products with high added value.

Keywords: *chemical industry, modernization, production, enterprise, potential, competitiveness.*

Introduction. The chemical industry is one of the leading sectors of the Ukrainian industrial complex, which produces wide range of products, targeted at the consumer as companies in other industries (as inputs) and final mass consumption goods. As the chemical industry has developed inter and intra communications technology, and high export potential, its performance significantly affect the level of the national economy. Global problems of country such as lack of resources, energy and food, environmental degradation, cannot be solved without sufficient development of the chemical industry.

The current stage of Ukrainian chemical industry development is characterized

by a systemic crisis that deepened due to adverse market, social, political, institutional, financial and economic processes. In these circumstances updated general scientific problem on definition and justification of future industry model. Building such a model should be based, among other things, on the study of competitiveness indicators of potential industry and its main actors. This task is devoted at this article.

Analysis of recent researches and publications. Development of the domestic industry conceptual basis and the formation of its various models carry the researchers leading scientific schools in the country: Institute of Economics and Forecasting NAS of Ukraine [1–3], The Institute of the Economy of Industry NAS of Ukraine [4–9], Research Centre of Industrial Problems NAS of Ukraine [10, 11]. Many of them pay attention to the massive changes that are currently taking place in the paradigm and methodology of industrial development. One of the priorities of modern industrial policy "announced again industrialization, or rather-neoindustrialization of national economies, whose main goal – the transition to the advanced high-tech, advanced manufacturing» [6, p. 6].

Development issues of neoindustrial model considered primarily in the context of the general problem as a new stage of the national economy modernization. The main tasks in the industry proclaimed "modernization of existing and creation the new workplaces with competitive levels of equipment and wages, increasing the proportion of technology fifth and sixth modes, providing trade the domestic market with high– quality industrial products in own production, the development of export potential and strengthening the position of domestic producers in international markets" [8, p. 196]. It should be noted patterns of industrialization and systematization undertaken Lyashenko, V. I. and Kotov, V. E., which emit (1) the traditional industrialization, (2) nekroindustrialization (3) postindustrialization and (4) new industrialization (neoindustrialization) [9, p. 35].

The important point of the modernization policy is the sectoral priorities justification. In the context of this research deserves attention the following thesis: "In determining the priorities of the state industry position need to strike a balance between industrial sectors (activities) that have strategic Ukraine's prospects in global markets and those that are critical criterion for national security. To ensure stakeholders consensus in choosing these sectors can offer the competitive advantages Ukraine criterion: natural and artificial (which have developed historically)" [7, p. 126].

Previously unsettled problem constituent. Every industry has its own characteristics, trends and problems of development, thus forming the conceptual foundations of modernization policies should take into account the industry specifics and its competitiveness. However, few modern researches in economics chemicals don't affect the determination of strategic sectoral development model.

Main purpose of the article is to study the characteristics of the chemical in-

dustry current development, the competitiveness assessment of its capacity and determination of the approaches basis to implement the modernization model.

Results and discussions. The research of the current state chemical analysis conducted on the basis of its competitiveness, since the presence of strong competitive position is a prerequisite for sustainable industry development. The main indicators, characterizing the potential competitiveness of the chemical industry in Ukraine over the past three years, calculated according to data [12] and are reflected in the table 1. In such research it used as indicators of industrial chemicals and chemical products, as large-scale production of basic chemical products provide nearly two-thirds of total industry volume indicators.

Data table 1 show that the structure of the industry is raw oriented, though in recent years there have been some positive changes. Thus, the share of basic chemicals, fertilizers and nitrogen compounds, plastics and synthetic rubber in primary forms in the structure of sales decreased to 72.4%. At the same time, the share of primary plastics and plastic products and chemical products consumer increased.

The technological component of the chemical industry capacity competitiveness remains low. A high percentage of depreciation (53.8% in 2014) said that the amounts of invested funds are not sufficient to radically improve the situation. However, investment spending declined relatively in 2013 by 40%. Capital expenditures for the unit implemented products sold for the period 2012–2014 decreased twice and made 4 cop / UAH (according to expert estimates of industry experts acceptable level of this index is at least 20 cop / UAH).

Foreign direct investments in the production of chemicals and chemical products in 2014 decreased compared to the previous year by almost 15%. This reduction was mainly due to the outflow offshore investments.

Investments in the chemical industry significantly constrained by poor financial ratio that is among the worst in the industry. Almost all chemical sub-sectors in the 2012–2014 biennium had negative financial results. Unprofitable production of chemicals and chemical products in 2014 increased almost 3-fold compared with 2012.

In the context of the objective of growth in energy prices the average energy consumption per unit of chemical products in Ukraine is 1.5 and 1.8 times higher than in the US and EU respectively. Instead, we should note an important and positive trend-reduction by half rate for natural gas, which in 2014 amounted to 0.06 m³ / UAH. This significant reduction in energy intensity index was mainly due to "small" and part of "big" modernization that the enterprise sector is still carried out in difficult conditions of limited investment resources.

Table 1. The basic indicators of the chemical industry competitiveness potential of Ukraine

<i>Evaluation options</i>	<i>Basic indicators</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<i>Structural competitiveness</i>	The share of the largest production industry sector, %	80,8	77,0	72,4
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	66665,3	49432,2	46760,6
	Wearout (FA), mln. UAH	40418,4	27677,7	25139,0
	Wearout (FA), %	60,6	56,0	53,8
<i>Raw (resource) competitiveness</i>	Energy intensity of industry production (by natural gas), m3 / UAH	0,12	0,11	0,06
<i>Price competitiveness</i>	Average domestic prices for basic products, UAH / t:			
	– ammonia	3937	3975	4478
	– urea	2952	2807	2843
	– ammonium nitrate	2337	2362	2788
	Productivity, th. UAH / person	578,14	491,97	647,7
	Return (loss) operating activities, %	– 8,0	– 8,2	– 23,5
<i>Market Competitiveness (internal)</i>	Rate of implemented products, %	104,7	86,8	95,6
<i>Market Competitiveness (external)</i>	Share of export in production, %	57,0	47,0	46,0
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	8	7	4
	Foreign direct investments, \$ Million.	998,5	1060,5	898,0
	Mastered capital investments, mln. UAH.	2219,6	3592,7	2174,7
<i>Innovative competitiveness</i>	The volume of scientific and technical work performed on their own, thousand UAH.	101040,8	81901,7	14577,7
	including applied research	16225,9	2224,9	1572,9
	research and development	80181,6	72113,7	10619,0
	The share of innovative products in commodity production,%	5,3	4,3	4,8
	Financing costs for the implementation of scientific and technical works, thousand UAH.	91370,6	68209,6	13597,7
	Number of enterprises implemented innovations	105	86	76
<i>Competitiveness staff</i>	The average salary of staff, UAH / month	3804	3640	3971

Certain technological and product innovations were present locally and limited to a small part of the sector. The share of innovative products in commodity production didn't exceed 5%.

Export potential tended to decrease. At the same time continued to increase the share of imported nitrogen fertilizer on the Ukrainian market, which was caused by low price competitiveness of Ukrainian products. Obviously, to further maintain market domestic producers is extremely necessary to take at least a point of technological innovation resource and energy conservation.

For a more detailed analysis of potential competitiveness of the chemical industry and establish the factors that led to the deterioration of the basic industries competitive positions, need to assess the dynamics of competitiveness key chemicals enterprises large– capacity. The main indicators of competitiveness, the authors calculated according to the official reporting companies are given in the Table 2.

Table 2. The basic indicators of large-capacity chemical products competitiveness on domestic enterprises

<i>Evaluation options</i>	<i>Basic indicators</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<i>PJSC "Concern Stirol"</i>				
<i>Structural competitiveness</i>	Share Company products (ammonia, urea, ammonium nitrate) to all sales, %	91,2	87,1	52,0
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	3094,3	3429,4	2700,8
	Wearout (FA), mln. UAH	1586,2	1748,8	1554,6
	Wearout (FA), %	51,3	51,0	57,6
<i>Raw (resource) competitiveness</i>	The energy production of the product cost, %:			
	– natural gas	77,6	77,6	59,0
	– electricity	5,3	6,1	9,0
<i>Price competitiveness</i>	Average prices of basic products, UAH / t:			
	– ammonia	3940,0	4085,0	4766,0
	– urea	2884,34	2818,0	2717,0
	– ammonium nitrate	2236,27	2263,0	2633,0
	Productivity, ths. UAH / person	1494,9	999,0	286,2
	Return (loss) operating activities, %	– 17,9	– 15,8	– 13,6
	The share of wages in production costs, %	2,0	2,8	1,1
<i>Market Competitiveness (internal)</i>	The rate of growth of sales, %	123,0	67,3	27,5

Table 2.

<i>Market Competitiveness (external)</i>	The share of export in production, %	83,5	78,5	46,6
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	6	9	5
<i>Innovative competitiveness</i>	The amount of own technological stepping stone for the implementation of scientific and design development	technological refinement not carried out		
<i>Competitiveness staff</i>	The average salaries of personnel, UAH	4125,1	5108,11	4774,83
<i>Cherkassy PJSC "Azot"</i>				
<i>Structural competitiveness</i>	Share Company products (ammonia, urea, ammonium nitrate) to all sales, %	75,2	75,6	85,7
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	12079,2	12208,5	2770,2
	Wearout (FA), mln. UAH	10666,8	10811,5	1411,2
	Wearout (FA), %	88,3	88,6	50,9
<i>Raw (resource) competitiveness</i>	The energy production of the product cost, %:			
	– natural gas – electricity	78,6 6,3	78,3 6,1	75,8 8,7
<i>Price competitiveness</i>	Average prices of basic products, UAH / t:			
	– ammonia	–	–	5735,8
	– urea	3027,6	2744,1	3514,6
	– ammonium nitrate	2375,6	2211,1	3030,1
	Productivity, ths. UAH / person	1396,0	1056,3	1316,8
	Return (loss) operating activities, %	– 7,5	– 11,9	6,4
	The share of wages in production costs, %	4,1	5,2	2,4
<i>Market Competitiveness (internal)</i>	The rate of growth of sales, %	92,1	82,3	124,0
<i>Market Competitiveness (external)</i>	The share of export in production, %	50,0	33,0	29,0
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	5	3	1
<i>Innovative competitiveness</i>	The amount of own technological stepping stone for the implementation of scientific and design development	technological refinement not carried out		
<i>Competitiveness staff</i>	The average salaries of personnel, UAH	5087,62	5379,82	5645,00

Table 2.

<i>PJSC "Rivneazot"</i>				
<i>Structural competitiveness</i>	Share Company products (ammonia, urea, ammonium nitrate) to all sales, %	89,3	95,6	91,6
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	1523,1	1682,1	1930,5
	Wearout (FA), mln. UAH	819,5	924,9	680,5
	Wearout (FA), %	53,8	55,0	35,2
<i>Raw (resource) competitiveness</i>	The energy production of the product cost, %:			
	– natural gas	63,6	60,4	55,2
	– electricity	10,9	10,4	10,0
<i>Price competitiveness</i>	Average prices of basic products, UAH / t:			
	– ammonia	4171,48	3987,97	5240,95
	– urea	–	–	–
	– ammonium nitrate	2395,0	2247,6	3042,24
	Productivity, ths. UAH / person	657,9	477,0	704,3
	Return (loss) operating activities, %	– 11,0	– 16,0	9,7
	The share of wages in production costs, %	7,8	8,3	1,4
<i>Market Competitiveness (internal)</i>	The rate of growth of sales, %	96,5	78,1	148,3
<i>Market Competitiveness (external)</i>	The share of export in production, %	no information available		
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	4	6	3
<i>Innovative competitiveness</i>	The amount of own technological stepping stone for the implementation of scientific and design development	technological refinement not carried out		
<i>Competitiveness staff</i>	The average salaries of personnel, UAH	4694,63	4642,35	4867,15
<i>PJSC "Severodonetsk Azot Association"</i>				
<i>Structural competitiveness</i>	Share Company products (ammonia, urea, ammonium nitrate) to all sales, %	77,1	78,0	64,66
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	2627,5	2989,5	3082,2
	Wearout (FA), mln. UAH	1987,2	2095,9	2165,2
	Wearout (FA), %	75,6	70,1	70,2

Table 2.

<i>Raw (resource) competitiveness</i>	The energy production of the product cost, %: – natural gas – electricity	78,36 7,3	77,8 6,9	62,0 9,4
<i>Price competitiveness</i>	Average prices of basic products, UAH / t: – ammonia – urea – ammonium nitrate	3828,4 2958,4 2343,0	3958,3 2889,1 2274,1	4601,4 2811,9 2448,5
	Productivity, ths. UAH / person	762,5	583,4	227,5
	Return (loss) operating activities, %	– 17,6	– 17,3	– 12,4
	The share of wages in production costs, %	4,9	6,3	2,5
	<i>Market Competitiveness (internal)</i>	The rate of growth of sales, %	101,0	71,6
<i>Market Competitiveness (external)</i>	The share of export in production, %	83,0	79,5	45,6
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	2	3	10
<i>Innovative competitiveness</i>	The amount of own technological stepping stone for the implementation of scientific and design development	technological refinement not carried out		
<i>Competitiveness staff</i>	The average salaries of personnel, UAH	3889,76	4232,68	3957,14
PJSC "DniproAZOT."				
<i>Structural competitiveness</i>	Share Company products (ammonia, urea, ammonium nitrate) to all sales, %	81,1	79,8	85,2
<i>Technological competitiveness</i>	The initial value of fixed assets (FA), mln. UAH	2545,2	2631,8	2 774,1
	Wearout (FA), mln. UAH	1943,3	2008,5	2 061,1
	Wearout (FA), %	76,4	76,3	74,3
<i>Raw (resource) competitiveness</i>	The energy production of the product cost, %: – natural gas – electricity	69,3 10,3	66,5 10,5	68,2 12,2
<i>Price competitiveness</i>	Average prices of basic products, UAH / t: – ammonia – urea – ammonium nitrate	3807,4 2937,1 –	3868,5 2778,07 –	4574,6 2782,9 –
	Productivity, ths. UAH / person	681,57	671,95	874,8
	Return (loss) operating activities, %	8,2	20,1	14,4
	The share of wages in production costs, %	6,8	7,5	6,7

Table 2.

<i>Market Competitiveness (internal)</i>	The rate of growth of sales, %	98,0	98,0	128,8
<i>Market Competitiveness (external)</i>	The share of export in production, %	no information available		
<i>Investment competitiveness</i>	Capital expenditures for the unit cost of implemented products, cop / UAH.	14	3	0
<i>Innovative competitiveness</i>	The amount of own technological stepping stone for the implementation of scientific and design development	technological refinement not carried out		
<i>Competitiveness staff</i>	The average salaries of personnel, UAH	3609,6	3886,12	4829,67

Due to the redistribution of production on the main structure of the basic chemistry products enterprises for the period 2012–2014 has changed. So, PJSC "Concern Stirol" and PJSC "Severodonetsk Azot Association" reduced the share of primary products and, conversely, the share of employees increased by PJSC "Rivneazot", PJSC Cherkassy "Azot" and PJSC "DniproAZOT." These processes are related mainly to the temporary suspension of large– scale production of PJSC "Concern Stirol" and PJSC "Severodonetsk Azot Association" as a result of complex military– political situation in the south– eastern region of the country where they are located.

The level of technological component of enterprises competitive capacity considered significantly different. Thus, the updated fixed assets and significantly reduced the rate of depreciation of PJSC "Rivneazot" and PJSC Cherkassy "Azot". However, depreciation of manufacturing equipment of PJSC "DniproAZOT" and PJSC "Severodonetsk Azot Association" remains critical – 74.3% and 70.2% respectively.

Fixed assets in 2014 allowed PJSC "Rivneazot" and PJSC "Azot" behind the technological potential to improve competitiveness component and other components – resource, price and market. Enterprises have overcome many years of unprofitable operations and profitability obtained at 9.7% and 6.4% respectively.

Analysis of the potential competitiveness basic indicators of PJSC "DniproAZOT" showed that unlike OSTCHEM holding enterprises, the company is working quite steadily and profitably. During the period studied, productivity increased by 28.4%. The growth rate of products sales in 2014 increased to 128.8%, operating profitability was 14.4%.

Research indicates that a considerable negative impact on the competitiveness of industry capacity could exert such factors as sub-monopolization. It is recalled that the production of basic chemical products among the most capital-intensive, making it difficult to start a new business in the area and restricts the number of "players" in

the chemical products market.

World experience shows that the highest level of efficiency in capital– intensive industries achieved production conditions no less than 70% of the field of four companies, providing optimal ratio of price stability and competition [13]. In Ukraine, four of the six producers of nitrogen fertilizers are controlled by a single company – OSTCHEM holding. Such a high concentration of assets in one owner creates dependence performance of all sub-sectors of industrial and commercial activity and monopoly market behavior. In this case, the financial results of the Company for many years remain negative through using offshore schemes.

Capital expenditures for the unit cost of products sold by the analyzed companies majority decreased. The growth of capital intensity was observed for those enterprises where sales volumes were significantly reduced, that growth capital expenditures were below the rate of sales growth.

Innovative competitiveness of enterprises large-capacity chemistry is low. Can be noted, that in all surveyed enterprises technological refinement for the corresponding period are not carried out.

The results of the potential competitiveness evaluation on basic chemicals enterprises necessary to state the fact that the current large-production has the potential weak competitiveness in such components as technology, innovation and investment.

If you use the above classification model of industrial development [9], can conclude that the main subsectors of the Ukraine chemical complex is on the first two stages of modernization. However, current trends and prospects of the global chemical industry related to the intensification of innovation processes and the implementation of neoindustrial model.

But today, when domestic owners give a clear advantage receipt "quick profits" for their own needs without worrying about the strategic development of enterprises and the shortage of state support and the limited investment resources, don't expect the implementation of high– scale innovative projects. It should start with improving technical and technological modernization and diversification towards low– tonnage chemical products with high added value. This will ensure in the short term to improve production efficiency, restore the quality characteristics of its capacity and launch effective mechanisms for innovative renewal. The resulting effects will form the resource base and innovative environment for the transition to a high-tech stage of modernization-neoindustrialization.

Conclusions and further researches directions. Estimation of the chemical industry potential competitiveness has shown that the key of the industry is weak on technological, innovation and investment components.

The main negative factors that hinder the competitiveness potential include sub–monopolization of basic chemistry, lack of investments and enterprises low innova-

tion activity.

In the context of limited investment resources first phase of neoindustrial model should be linked to supporting processes of technical and technological modernization and efficient use of the existing potential the traditional chemical production. This approach should provide resources and create an active environment for the development of innovative production in innovative chemical products with high added value.

To monitor the modernization process of chemical industry enterprises, increasing the efficiency of management decisions, improve strategic planning requires the development and implementation of methodologies for evaluating the modernization processes. The decision of future research will be directed these tasks.

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ДОСЛІДЖЕННЯ ПЕРЕДУМОВ МОДЕРНІЗАЦІЇ ХІМІЧНОЇ ПРОМИСЛОВОСТІ УКРАЇНИ НА ОСНОВІ ОЦІНКИ КОНКУРЕНТОСПРОМОЖНОСТІ ЇЇ ПОТЕНЦІАЛУ

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Стаття присвячена аналізу сучасного потенціалу хімічної промисловості України та її основних суб'єктів – підприємств з виробництва базової багатотоннажної хімічної продукції. Вивчення конкурентоспроможності потенціалу галузі і підприємств проведено на основі оцінювання її ключових складових. Визначено фактори, які спричинили погіршення конкурентних позицій базових виробництв. Зроблено висновок, що в умовах обмеженості інвестиційних ресурсів перший етап реалізації неоіндустріальної моделі має бути пов'язаний з підтримкою процесів техніко-технологічної модернізації і ефективного використання наявного потенціалу традиційних хімічних виробництв. Такий підхід має забезпечити ресурси і створити активне інноваційне середовище для розвитку виробництва інноваційної хімічної продукції з високою доданою вартістю.

***Ключові слова:** хімічна промисловість, модернізація, виробництво, підприємство, потенціал, конкурентоспроможність.*

ИССЛЕДОВАНИЕ ПРЕДПОСЫЛОК МОДЕРНИЗАЦИИ ХИМИЧЕСКОЙ ПРОМЫШЛЕННОСТИ УКРАИНЫ НА ОСНОВЕ ОЦЕНКИ КОНКУРЕНТОСПОСОБНОСТИ ЕЕ ПОТЕНЦИАЛА

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Стаття посвячена аналізу сучасного потенціалу хімічної промисловості України та її основних суб'єктів – підприємств по виробництву базової багатотоннажної хімічної продукції. Вивчення конкурентоспроможності потенціалу галузі і підприємств проведено на основі оцінювання її ключових складових. Визначено фактори, які спричинили погіршення конкурентних позицій базових виробництв. Зроблено висновок, що в умовах обмеженості інвестиційних ресурсів перший етап реалізації неоіндустріальної моделі повинен бути пов'язаний з підтримкою процесів техніко-технологічної модернізації і ефективного використання наявного потенціалу традиційних хімічних виробництв. Такий підхід забезпечить ресурси і створить активне інноваційне середовище для розвитку виробництва інноваційної хімічної продукції з високою доданою вартістю.

***Ключевые слова:** химическая промышленность, модернизация, производство, предприятие, потенциал, конкурентоспособность.*