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THE IMPACT OF IMPORT ON THE DEVELOPMENT OF UKRAINIAN DOMESTIC MARKET

The factors of Ukrainian domestic market growth and the impact of import on its development are analyzed. The volume of suspected demand at domestic market is calculated. The correlation of domestic and imported goods at Ukrainian domestic market is analyzed and the great threat of low competitiveness for national products at the domestic market is outlined. The recommendations on import substitution in Ukraine are made. To prevent domestic market of Ukraine from oversaturation by imported goods is possible if the range of strategic measures are determined.

Keywords: domestic market, import, import dependence, import substitution, import regulation.

Determination of the problem. The dynamics of Ukraine's economic development is characterized by the high level of dependence on external environment and parameters of cooperation with the entities of international regional economy. The share of import in the goods and services trade in Ukraine grows more intensively, nowadays, than the export one. This fact requires examination of maintenance strategy efficient, consideration of dependence of national economy on import and the trends towards extension of domestic market capacity.

The terms of international regional economic integration set the task for Ukraine to use domestic market more efficiently as an instrument of strengthening competitive ability of national economy. In this context the development of competitive environment by considering both interest of producers and importers as well as contraction of shadow market should become instruments of modern economy growth strategy for Ukraine.

The tendency to growth of import production at Ukrainian domestic market does not correspond to national economic interests and constrains development of national production. Therefore creation of new model of domestic consumption that combines interests of consumers and the interests of domestic producers are of utmost importance.

Brief literature review. Certain aspects of domestic market development were outlined by the following scientists: S.V. Davydenko [1], V.D. Lahutin, A.A. Mazaraki [3], V.A. Mau [5], T.O. Ostashko, O.V. Pustovoi, V.O. Tochylin [14], etc. In their tractates they pay much attention to the key role of domestic market for the long-term economic and financial stabilization of Ukraine in terms of world economy development and evaluate the scale of import consumption at domestic market of Ukraine.

Unresolved earlier parts of general problem. However, it is clear that import has strong influence on the formation of Ukrainian domestic market, saturation should be examined

better. Therefore scales of import at domestic market should be analyzed.

The aim of the article is to define the place of import at domestic market and to outline its impact on the development of Ukrainian economy.

Main results. The globalization processes essentially influence on the development of domestic markets and provoke countries with developed economic to use the instruments of markets defense extensively to increase the pressure on the competitors at external goods markets. The foreign trade dynamics recently shows high and close to critical level of import and export dependence (according to the methodology of National Institute of International Security Problems the import and export dependence is evaluated by the ration of import and export to GDP; its critical level should not increase 50% of GDP).

The export-import goods flows have become unbalanced with high level of volatility and sharp change in correspondence of goods value to an actual amount of goods export and import during the 2004-2013 years (Fig. 1).

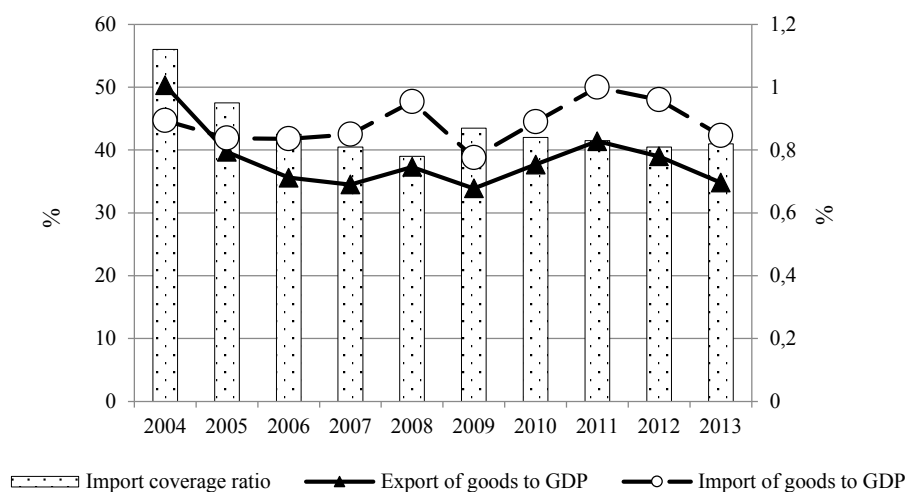


Figure 1 – Ratio of goods export and import to GDP and dynamics of import coverage ratio in Ukraine in 2004-2013, (developed according to the data of [2])

In 2012 the role of goods export in the formation of GDP decreased comparing to the growth in 2011-2012 and became closer to the critical level of import dependence. Import coverage ratio diminished to 0,81 in 2012 and it amounted to 0,82 in 2013.

The crises in 2008-2009 showed extremely low steadiness of Ukrainian domestic market to exchange rate in fluctuations. The extension of effective demand was accompanied by the growth of import (at many domestic markets) that in current situation is unfavorable for the development of domestic production. According to Mau V.A 75% of domestic demand surplus leads to inflation and import growth in transformational economies and only 25% stimulates domestic production [5, p. 20]. Therefore considerable share of population with average income and lower-middle income is oriented at the purchase of cheap but low-quality import consumer goods.

Nowadays there is no single generally accepted methodic of domestic market volume calculation and that motivates economists to replace it in the models by the parameter of “gross domestic product” (GDP). Along with this it approximately represents the volume of national economy domestic market but it does not take into account that the amount of goods sales can exceed the volume of its production by the size of credits and loans from abroad. Moreover the GDP does not encompass data on non-market transactions.

The GDP is used for applied calculations of Global Competitiveness Index of World Economic Forum. It takes into consideration that the volume of domestic market can grow not only due to own income of residents (market players) but also due to the borrowed funds of non-residents.

But before it was deemed that domestic market could be calculated as the aggregate of goods and services according to certain prices level where the level of their composite demand for goods and services amounts to GDP that is the market value of end product manufactured by the branches of material and services sphere at the country’s territory during the certain time period.

Thus, Ukraine in the ranking of Global Competitiveness Index for 2012-2013 improved its positions by nine points and took 73 position among 144 countries of the world [6] which was under investigation. Ukraine’s position has grown for the second consecutive year (after the decrease by 17 points in 2009-2010) [8] and has reached before-crisis level. According to the parameter “Domestic Market Volume Index” Ukraine is positioned high among the countries of Central and Eastern Europe and CIS. It took 27 position (out of 131) in 2007-2008 [9], 29 place (out of 134) in 2008-2009 [10], 29 place (out of 133) in 2009-2010 [8], 28 place (out of 139) in 2010-2011 [11], 37 place (out of 142) in 2011-2012 [12], 38 place (out of 142) in 2013-2014 [7]. The positions worsened when Ukraine took 27 position by the volume of domestic market in 2007-2008. Ukraine still remains in the group of countries that have not reached the average competitive ability rate and considerably lags behind the developed countries.

However, the methodic of World Economic Forum stipulates the hypotheses that introduce the errors to the calculations. The biggest among them is that all production of the end aggregate product is regulated by the market. Nevertheless, the detailed analysis shows that all production of end consumption can be detached into the following groups [13, p. 52]:

1. Market production: goods and services in circulation at domestic markets.
2. Production manufactured for own end consumption.
3. Goods created through the use of non-market production (goods provided free of charge or non-profitable goods).

The second and third groups are regulated not by market mechanism in national economy but by the needs of the residents and supply of mineral resources of the country.

The same hypotheses were outlined by V.O. Tochylin. He deemed the methodic of World Economic Forum as questionable according to that methodic all national economy production consumed by residents was purchased through the market and therefore is market production [14, p. 47]. This condition is not carried out in practice and the residents consume considerably more non-market products than market one.

Calculation of domestic market value according to this methodic (Table 1) shows that domestic market value growth approaching 99,6% GDP in the examined period and amounts to 30,8 thousand hrn per capita in 2013.

Table 1 – Volume of Ukrainian domestic market in 2000-2013,
(developed according to the data of [2])

Indicators	2000	2005	2008	2009	2010	2011	2012	2013
Domestic market volume, mln hrn	132700,5	389957,9	692753,2	936619,4	836383,0	1004061,1	1265340,1	1496602,8
Domestic market volume, % to GDP	78,0	88,3	96,1	98,8	91,6	92,7	97,2	99,6
Domestic market volume per capital, hrn	2684,6	8247,7	14851,3	20197,6	18125,6	21845,0	27640,5	30763,6

Average paces of prospective aggregate demand growth amounted to 119,3% in Ukraine's economy in 2001-2013 years (Table 2).

Table 2 – Potential volume of aggregate demand at domestic market of Ukraine, mln hrn,
(developed according to the data of [2])

Indicators	2001	2005	2008	2009	2010	2011	2012	2013
Present personal income	119048	298275	470953	634493	661915	847949	988983	1149244
Amount of consumed production obtained from personal subsidiary plot and self-production	14532	16509	20098	23882	28457	34070	35314	30333
Capital investment	40818	111174	222679	272074	192878	189061	259932	263728
Potential value of aggregate demand	145334	392940	673534	882686	826336	1002940	1213601	1382639
GDP at actual prices	204190	441452	720731	948056	913345	1082569	1302079	1459096
Share of GDP formed beyond the market	58856	48512	47197	65370	87009	79629	88478	76457
% to GDP, %	28,8	11,0	6,5	6,9	9,5	7,4	6,8	5,2

That led to the decrease in GDP value of the share produced beyond the market in 2013. The value reduced to 5,2% comparing to the index of 2001 year, which amounted to 28,8% and maintained the increase of national economy marketability as well as accelerated its transformation in the market economy system.

Domestic market of Ukraine was in unfavorable conditions for initiation of increase in commodity production and growth of retail turnover volume comparing to the volume of domestic market in 2000-2013. Thus, if amount of retail turnover in 2000, compared to the volume of domestic market, amounted to 40,9 %, it grew up to 53,7% in 2013. As a result, consumer demand changed in accelerated pace at domestic market of Ukraine. Accumulation of gross savings, compared to the volume of domestic market (29,1-39,1% during 2000-2005), was also observed. But during the following years this ratio has considerably decreased to 16,4% in 2011 year, what consequently led to diminishing of investment possibilities of national producers. As a result, physical and financial resources of Ukraine's economy

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directed not at the extension of domestic goods production but at the increase of import. Thus, sales of imported consumer goods has increased almost 1,3 times amounting to 19,3 % in 2006-2013, compared to the value of domestic market.

The share of imported food products increased at 4,6 percentage points during 2005-2013 and amounted to 13,7% in 2013 and the share of non-food products at 15,7 p.p. equal to 58,1% (Table 3).

Table 3 – Share of imported food / non-food products sold through the trade network of enterprises in 2005-2013, %, (developed according to the data of [2])

Food products	2005	2009	2011	2013	Non-food products	2005	2009	2011	2013
Total	9,1	11,6	11,8	13,7	Total	42,4	45,3	52,8	58,1
Fish and seafood	19,4	27,5	29,6	34	Clothes and linen of fabrics	76,5	84,6	89,2	92,3
Canned fish and final fish products	20,9	25,4	26,2	26,7	Leather and fur clothes, other products of them	18,8	71,5	87,2	90,7
Milk and dairy products	5,5	7,5	5,5	7,4	Headwear (except fur and knitted fabrics)	28,3	56,5	68,5	94,5
Vegetable oils	5,7	7,4	6,7	6,9	Knitted outerwear and underwear	83,1	87,4	92,7	90,7
Confectionery	10	10,5	9,8	12,8	Footwear	90,7	93,6	96,4	97,2
Paste goods	11,2	18,3	20,2	24,5	Toiletries	69,5	72,3	74	77,3
Potatoes	9,1	8,5	5,4	12,3	Watches	93,8	96,1	96,2	97,1
Vegetables	9,5	13	9,4	22,3	Computers and other computing techniques	77,5	88,3	97	98,8
Canned vegetables	19,2	19,2	18,6	23	Audio and video equipment	96,4	97	97,5	95,3
Canned fruits and berries	17,1	31,6	35,3	43,7	Photographic equipment	96,3	96,7	96,1	98,8
Alcoholic beverages, total	7,9	10,9	12,6	15,7	Games and toys	60	62,3	70	76,8
Vodka and alcoholic products	6	9,8	11,4	16,1	Other cultural goods	94,8	78,5	72,3	71,2
Low-alcohol beverages	3,9	5,1	5,2	7,2	Motorcycles, scooters, motorbikes	60	97	99,2	99,8
Tea	35,7	34,1	32,8	30,9	Automobiles and Accessories	76,9	75,7	85,4	87,4
Coffee	41,9	48,1	50,7	54,4	Sports goods, including bicycles	56,7	71,9	76,3	78,4
Soft drinks	13,5	7,4	9,3	6,3	Tableware and dinner sets	57,4	64,1	69,6	75,4
Mineral water	6,9	7,9	8,2	7,6	Electrical appliances	91,9	85,2	89	89,3
Tobacco	6,5	7	6,9	5,1	Washing, cleaning and care means	45,4	52	58,9	61,5
Other food products	18,8	17,1	18,1	21,6	Other non-food products	27,29	36,69	47,3	52,4

Great strengthening of import component should be marked for the following goods at the market of food products: fish and seafood (relative density at Ukrainian domestic market has increased at 14,6 p.p. during 2005-2013 and amounted to 34,0% in 2013), canned fish and final fish products (at 5,8 p.p. and 26,7% in 2013), paste goods (at 13,3 p.p. and 24,5% in 2013), vegetables (at 12,8 p.p. and 22,3% in 2013), fruits, berries, grapes, nuts, watermelons and melons (at 17,8 p.p. and 51,2% in 2013), vodka and alcoholic products

(at 10,1 p.p. and 16,1% in 2013), vine (at 13,8 p.p. and 28% in 2013). At the same time the share of imported meat and canned meat, tea, soft beverages, tobacco and some other types of food products has decreased.

Therefore, it can be stated that domestic food industry in general meets the growing demand of population and situation at the food market does not provoke special concern. But opposite situation takes place at the market of non-food goods. In this segment of consumer market the tendency to increase import production is observed for the majority of commodity items not only technology intensive but almost for all types of consumer goods production. Domestic production is mainly unable to provide qualitatively competitive production. This leads to the situation that imported products meet 92,3% of inner demand for clothes and linen of fabrics, 94,5% for headwear, 97,1% for footwear. Extension of demand for the everyday goods, at the same time, is the objective phenomena and should work for the development of native country not for the development of others.

Growth of price competitiveness with the hryvnya depreciation and growth of relevant price growth for import goods were basic factors of slight increase of demand for domestic consumer goods in 2009-2011, but already in 2012 the share of domestic goods production sale decreased as far as no new domestic goods appeared at consumer market in post-crisis period [4, p. 14].

According to Mazaraki A.A. and Lahutin V.D. Ukraine's economy has high level of dollarization and paces of domestic goods market change considerably depend on the dynamics of hryvnya exchange rate [3, p. 19]. It influences the state of domestic market through the change of aggregate demand by means of redistribution of income and assets in favour of exporters and other economic agents as well as change of purchasing power of currency assets. Depreciation of hryvnya acquits the part of domestic market of import goods. But the ratio between the share of domestic production goods and import analogues is volatile. The displacement of national producers by the importers can be observed. Economic science has long ago outlined close relationship between the paces of national currency exchange rate and the dynamics of import expansion of domestic market. The situation in Ukraine is complicated by available lag between the purchasing power parity and nominal hryvnya exchange rate.

The dependence of domestic market saturation on the tendencies of foreign trade and on the dynamics of hryvnya exchange rate actualizes the problems of export-import flows state regulation. The structure of commodity supply at domestic market of Ukraine in general represents significant disproportion of industrial capacity and domestic market needs as well as considerable pressure from import. Competitive domestic production should become the basis for efficient functioning and development of domestic market in terms of existence of relevant tariff and nontariff barriers for import.

According to Davydenko S.V. the growth of competitiveness of producers, importers and domestic producers is the positive sign of domestic market development [1, p. 99]. However the disproportion between national production and import at domestic market can still be observed. This is due to existence of following factors: slow change of stet regulation policy and its reorientation at stimulation of productive and not intermediary-distributive activity; lack of domestic product range that gives ground to imported one by quality and price; slow enhancement of customs control and the system of import excess to domestic market that keeps considerable difference between customs value and prime cost of production of wide range of goods nomenclature, primarily of consuming purpose, etc.

Conclusions and implications for a future research. Preventing domestic market of Ukraine from oversaturation by import goods is possible in case of introduction range of strategic measures that allows to: enhance the mechanisms of customs control by the correspondence to the real value of declared customs value of goods crossing borderline of Ukraine; introduce scientifically justified mechanisms of tax stimulation of expenses on modernization of production capacity in terms of further increase of goods at domestic markets and their realization; introduce international standards for the quality of consumer products both imported and of domestic production that is sold at domestic markets; expand the prices monitoring and control system at domestic market in order to prevent price fluctuations and speculations; stimulate forming of national commodities brands and their assignment at domestic market and support with extension of availability at foreign markets, etc. Implementation of the above mentioned measures will promote qualitative extension of domestic market of Ukraine, strengthen the terms of competitiveness and improve the range and quality of goods under realization as well as promote the import substitution strategy.

New directions of research should be aimed at the identification of external factors in the growth of the domestic market of Ukraine, which directly affect the scale of imports. This will allow detecting threats that are external factors, and taking measures to eliminate them.

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Вплив імпорту на розвиток внутрішнього ринку України

Проаналізовано чинники зростання внутрішнього ринку України та масштаби впливу імпорту на його розвиток. Розраховано обсяги потенційного попиту на внутрішньому ринку. Оцінено співвідношення вітчизняних та імпортованих товарів на внутрішньому ринку України й виявлені загрози значних масштабів імпортоспоживання при низькоконкурентоспроможному національному виробництві. Обґрунтовано рекомендації щодо імпортозаміщення в Україні.

Ключові слова: внутрішній ринок, імпорт, імпортозалежність, імпортозаміщення, регулювання імпорту.

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Влияние импорта на развитие внутреннего рынка Украины

Проанализированы факторы роста внутреннего рынка Украины и масштабы влияния импорта на его развитие. Рассчитаны объемы потенциального спроса на внутреннем рынке. Оценено соотношение отечественных и импортных товаров на внутреннем рынке Украины и выявлено угрозы значительных масштабов импортотребления при низькоконкурентоспособном национальном производстве. Обоснованы рекомендации по импортозамещению в Украине.

Ключевые слова: внутренний рынок, импорт, импортозависимость, импортозамещения, регулирования импорта.

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