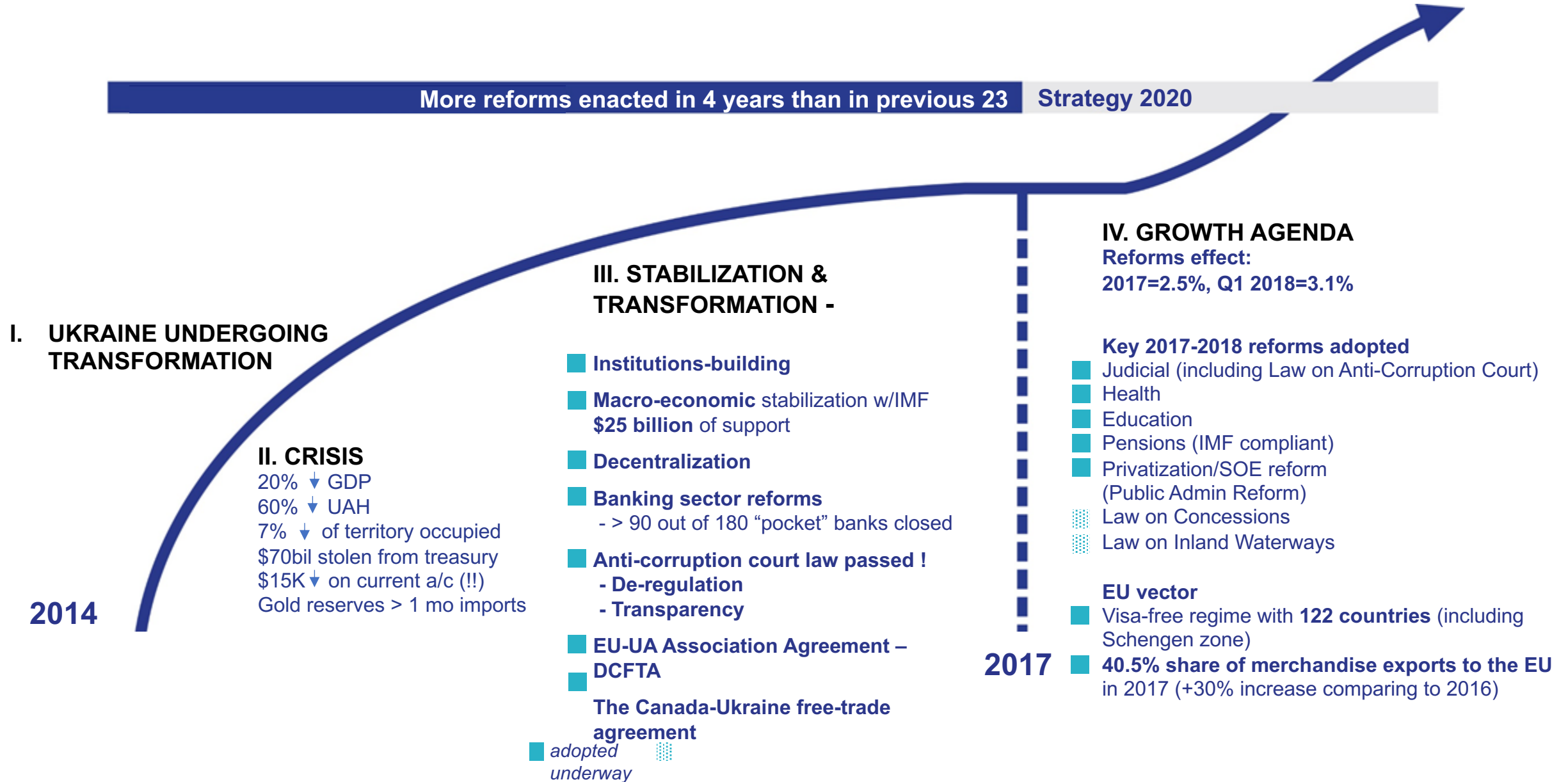
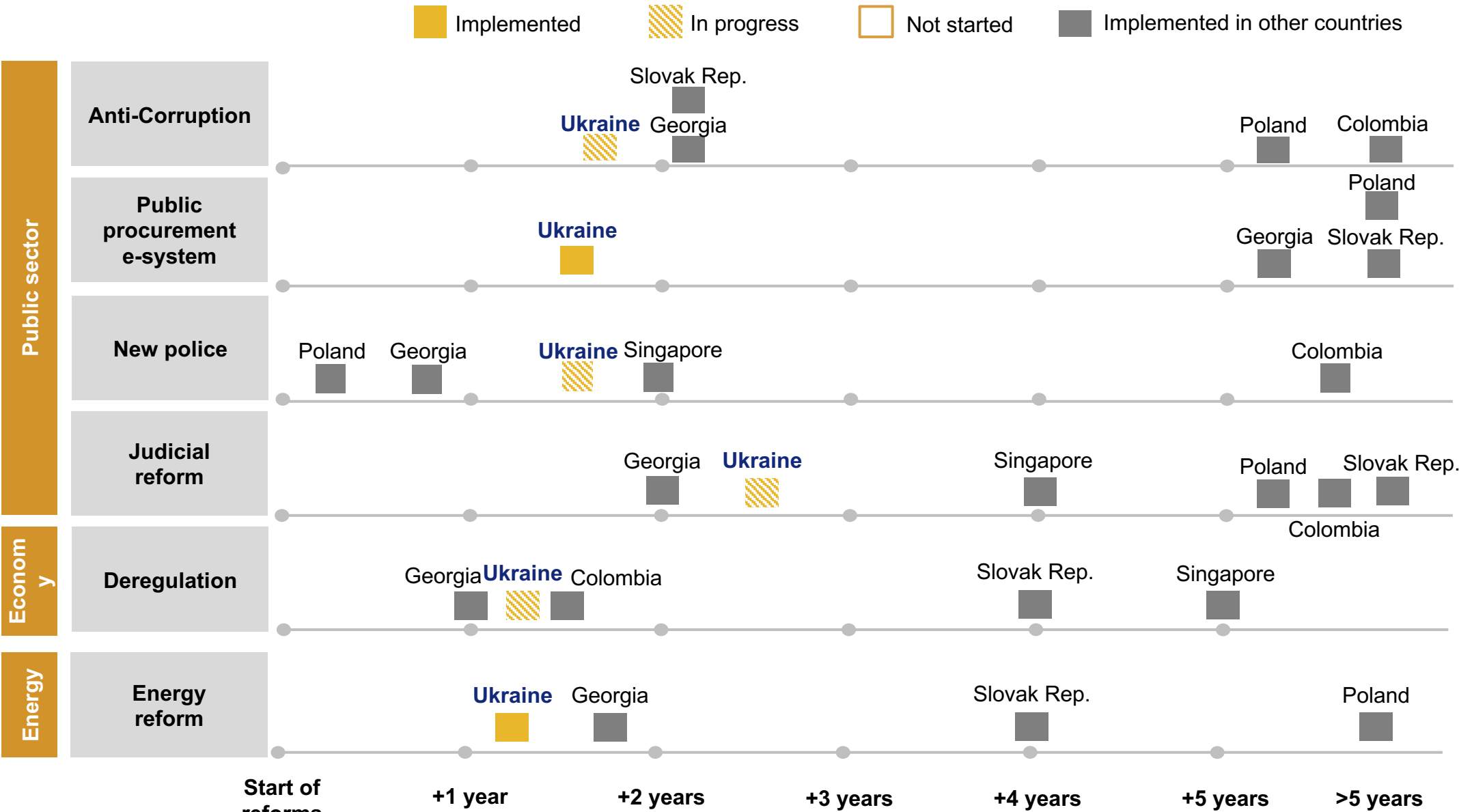


Invest in  
**Ukraine** **NOW** 

**Innovation and Opportunity**

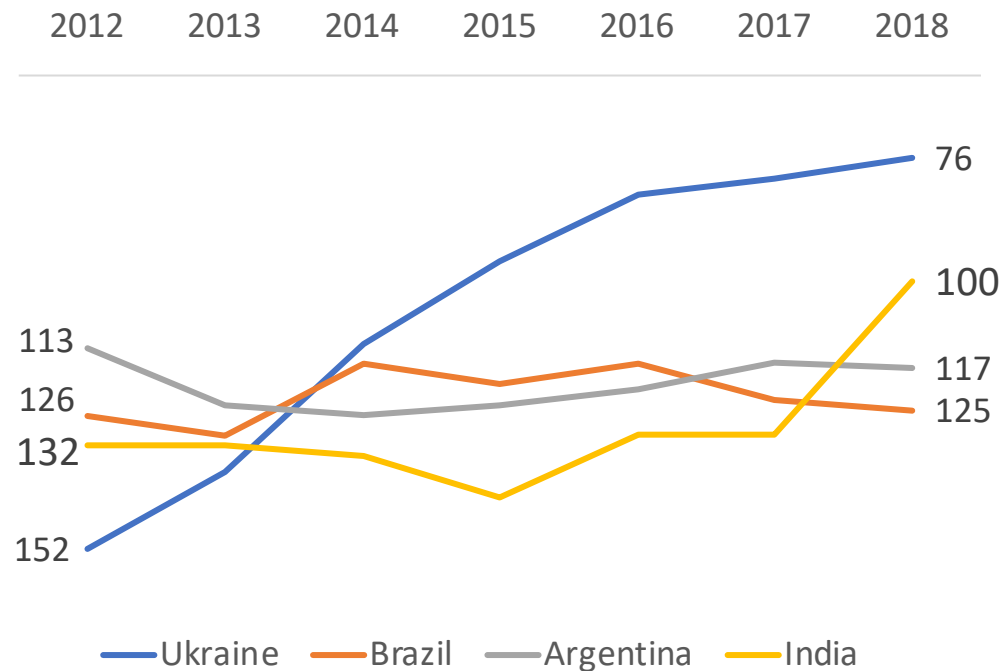


# Ukraine Launched Many Structural Reforms Ahead of its Peers



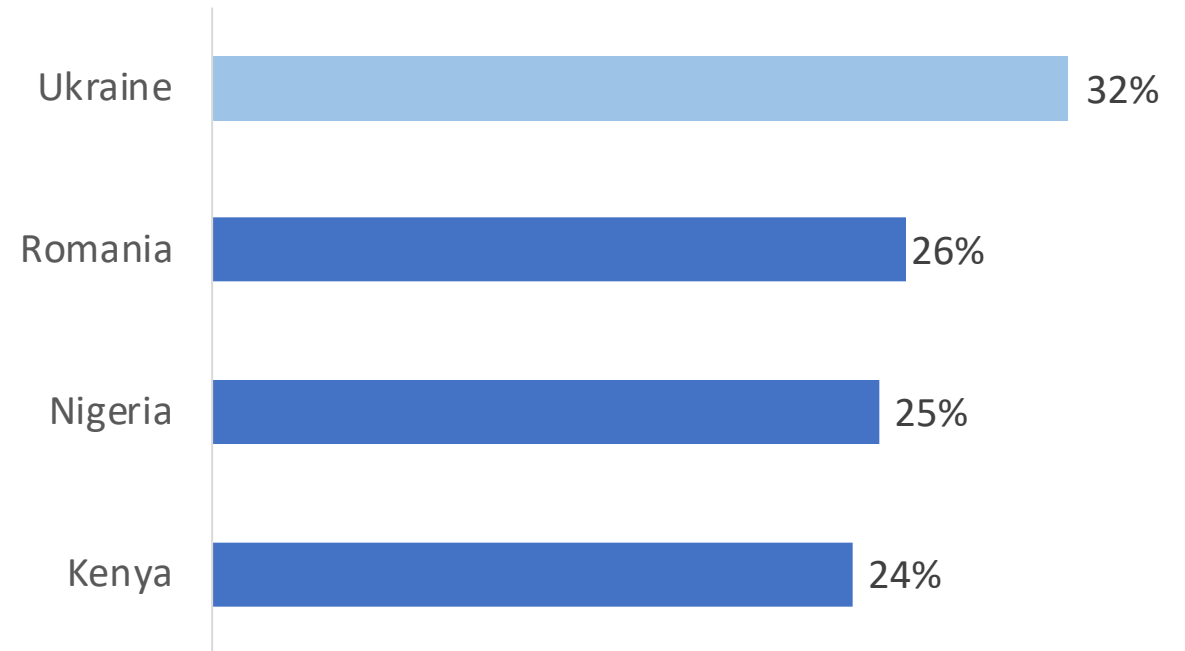
## Ukraine vs peers in Doing Business ranking

Reforms passed by Ukraine in recent years enabled significant rise in Doing Business ranking



## Ukraine tops EMEA\* list for potential investment

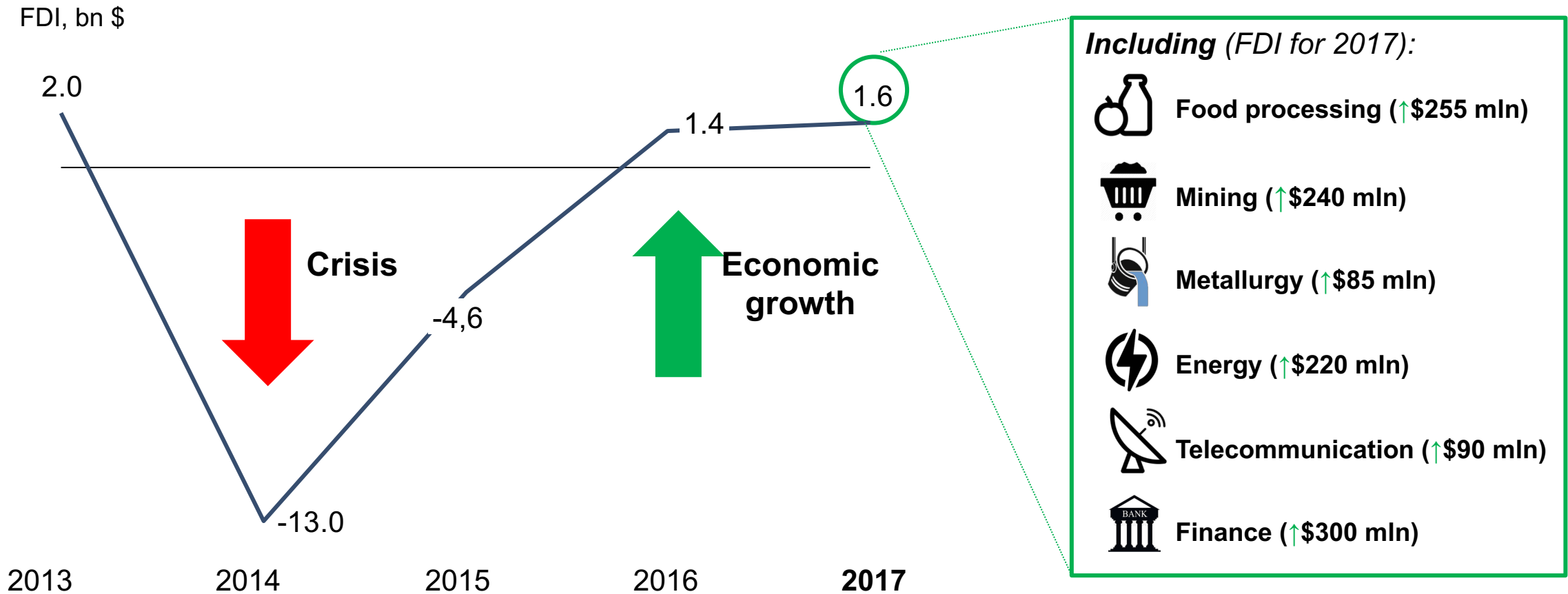
Fund managers are eyeing Ukraine for deals for the next 12 months, Institutional Investors' survey 2017 says



\*EMEA – Europe, Middle East, Africa



In 2017 FDI flow reached **\$1.63 billion**, which is **20%** higher than in 2016, showing **structural restoration** of investment activity:



**BRAINS & GRAINS**



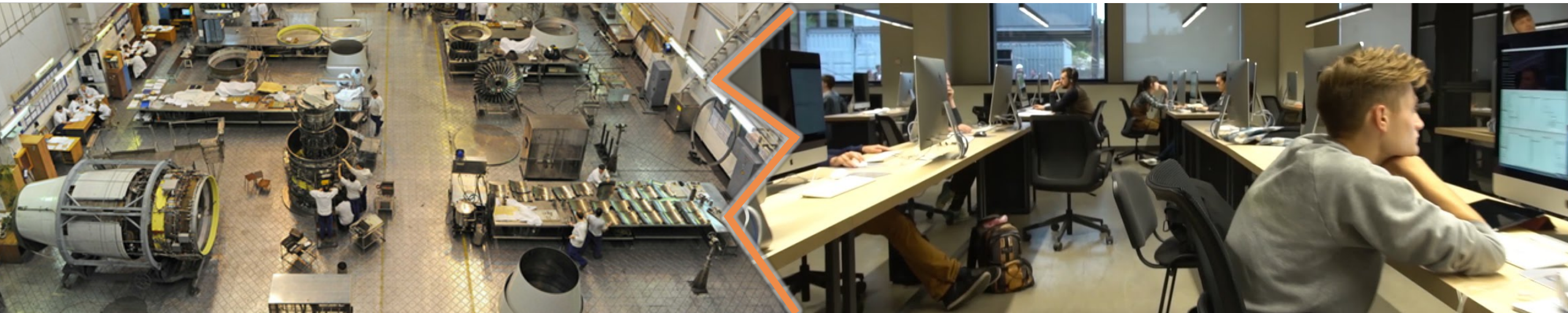
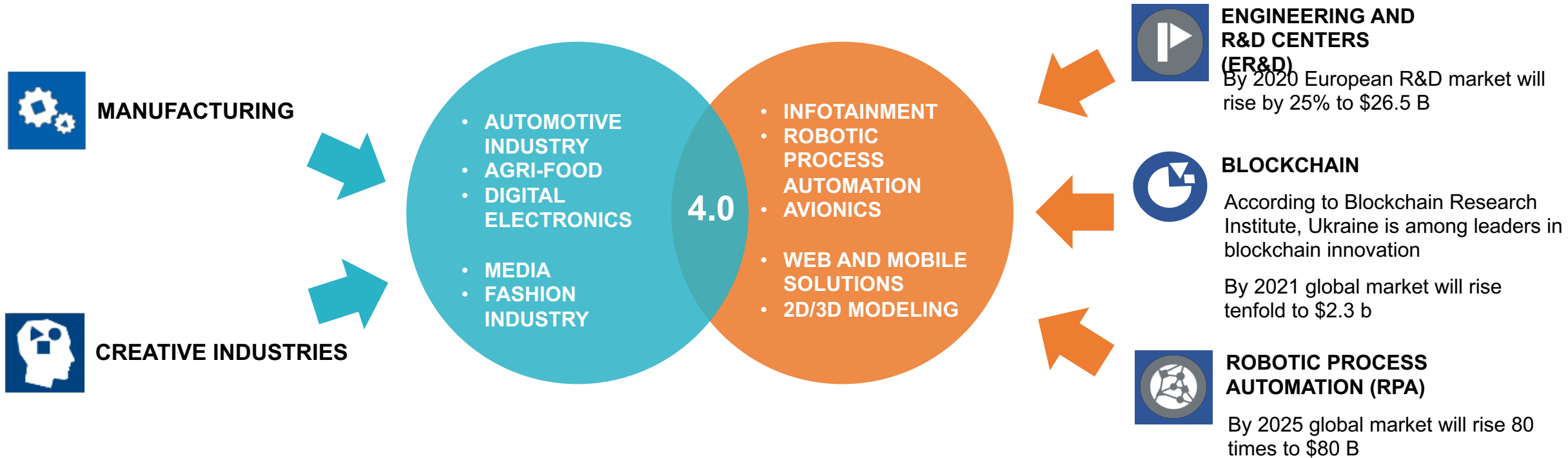
**INNOVATION & OPPORTUNITY**



**INVESTMENT  
OPPORTUNITIES IN UKRAINE**







# Industrial Opportunities (notes to previous slide)

UkraineInvest



## AUTOMOTIVE INDUSTRY CLUSTER

- > 20 foreign companies
- > € 500 M of investment
- ~ 60 thousand of employees



## HOUSEHOLD APPLIANCES AND ELECTRONICS

- efficient production platform in Europe
- production volume in 2017 – \$ 0.6 B
- DCFTA and Association agreement with EU
- 16 FTAs with 45 countries



## AGRI-FOOD

- large agricultural raw materials base (1/3 of Europe's arable land)
- average production growth of >21% during 2014-2017 (\$17 B in 2017)
- proximity to large sales markets (EU, Middle East)
- high-income countries add >US\$200 of value by processing 1t of agricultural products, while developing countries add < US\$50 - Ukraine's opportunity in agri-food amounts to ~\$9.3B

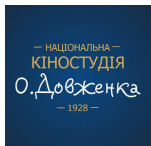


## INFORMATION TECHNOLOGIES

- Ukrainian IT outsourcing market has grown by nearly 30 times over the last decade, from \$110 M in 2003 to about \$3.6 B in 2017
- 18 Ukrainian IT companies are among top-100 global IT service providers
- 130'000 engineering graduates annually (including 16'000 IT graduates)
- 33 Ukrainian films were released in 2017 (12 films in 2013)
- > UAH 1 B of government support for film industry in 2018
- strong media content editing center
- global brands (Apple, Diesel, Lacoste, etc.) shoot commercials in Ukraine

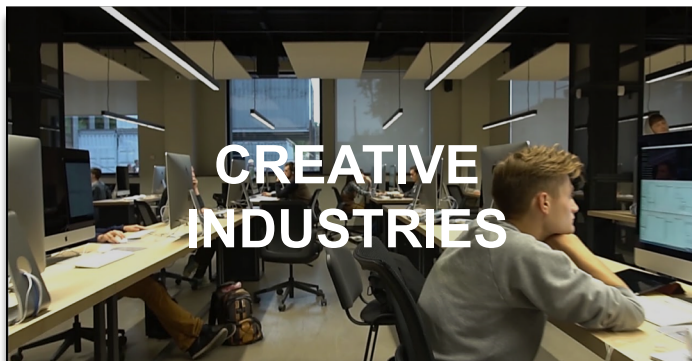


## MEDIA



## FASHION INDUSTRY

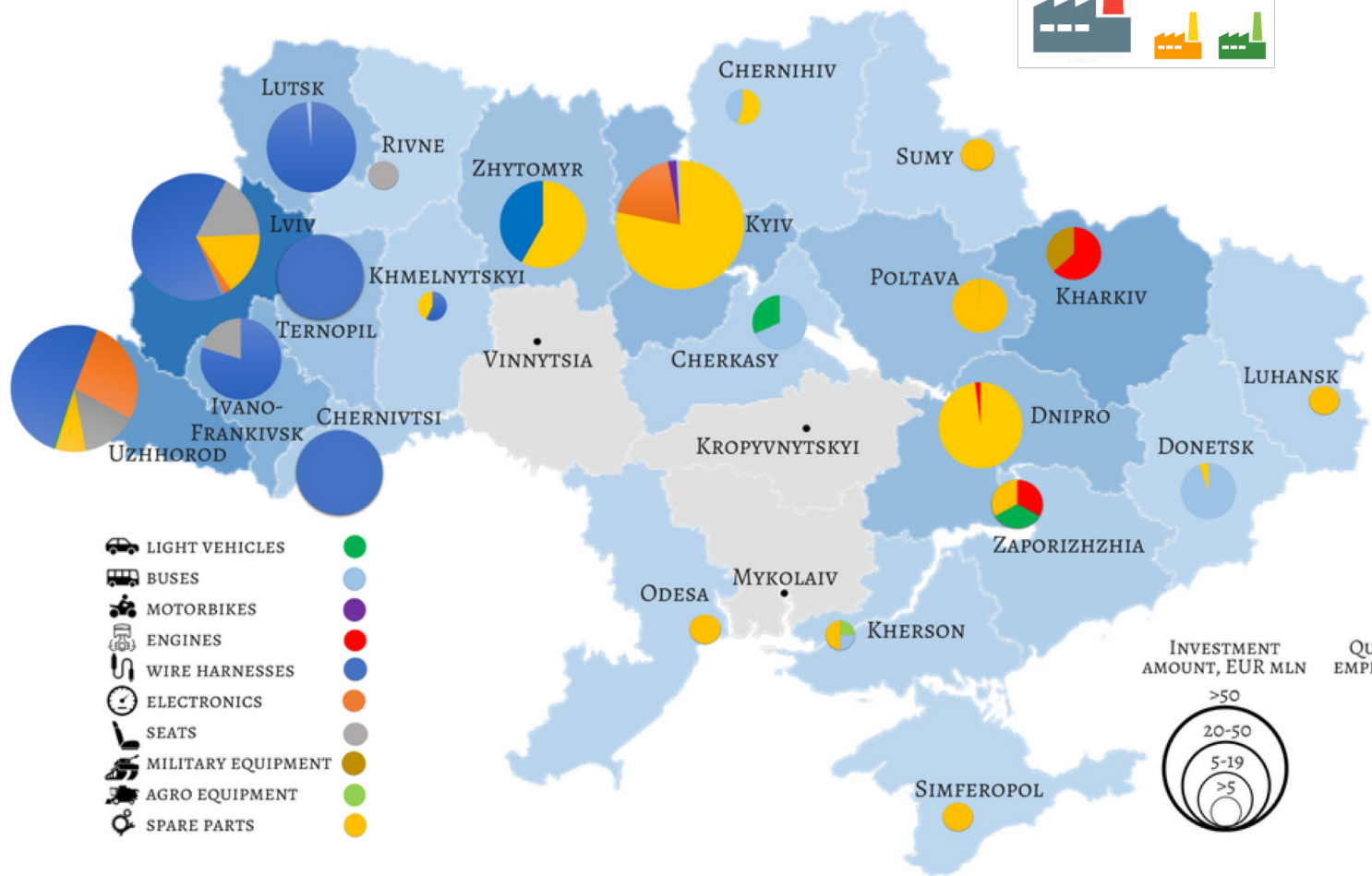
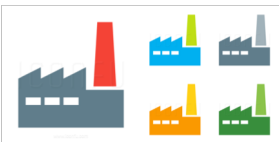
- >15 global fashion brands have production facilities in Ukraine
- > 220 thousand of employees
- production volume in 2017 – \$ 0.8 B
- elegant and striking design collections from Ukraine have now captured the attention of elite fashion houses and their clients around the globe





## Strong existing manufacturing base

### Automotive Industry of Ukraine



Total investment  
EUR 400-800 mln

Total employees  
60 000-120 000

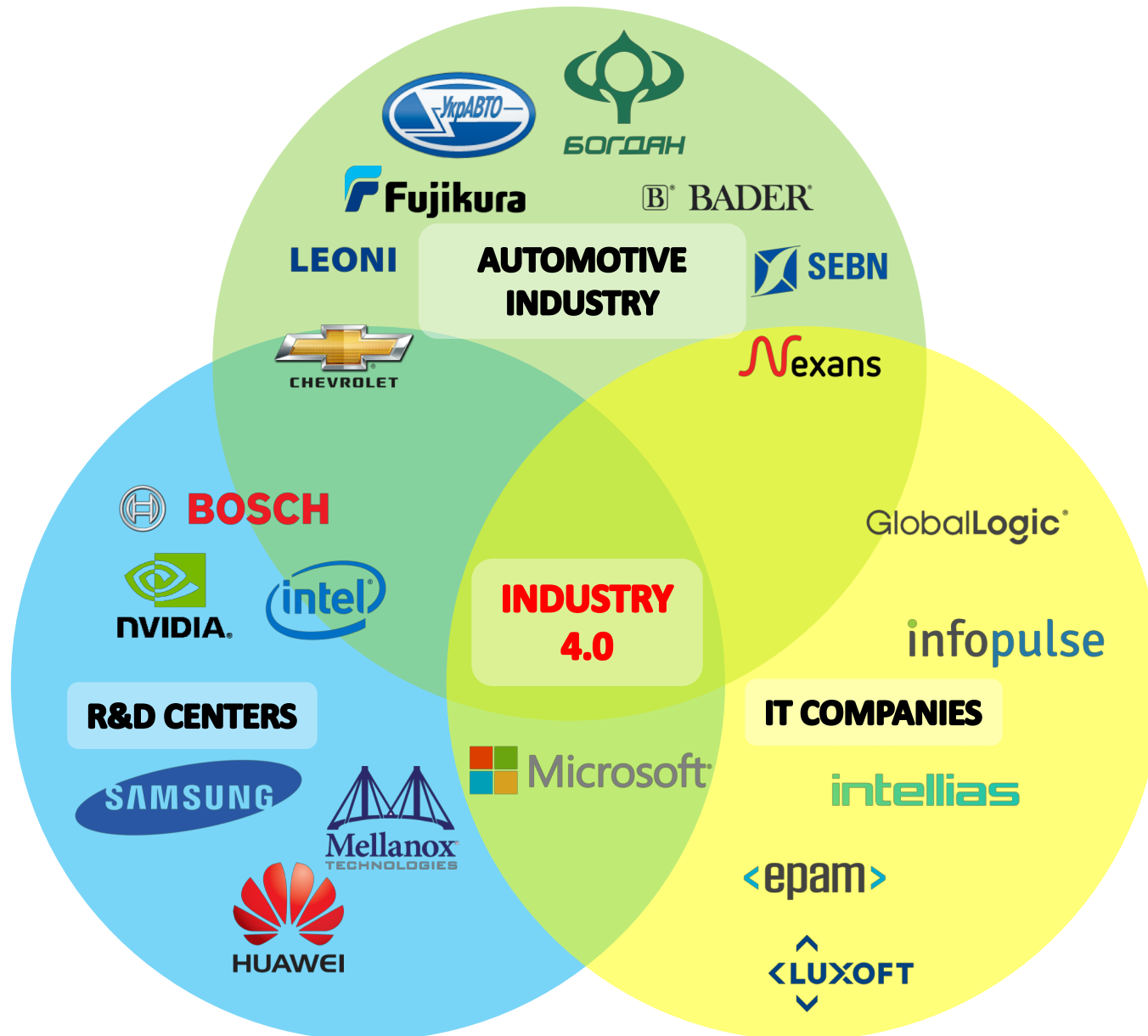
## Human capital



## IT solutions



- infotainment
- robotic process automation



A number of Ukrainian IT companies already cooperate with world automotive brands and deliver to them high-tech products:

- Automotive and mobile navigation
- Maps
- Human-machine interface (HMI)
- Computer vision
- Infotainment

CLIENTS AND PRODUCTS

**MISSION:** TO ELEVATE UKRAINE'S PLACE IN THE GLOBAL ECONOMY THROUGH SUSTAINABLE ECONOMIC GROWTH

**VISION:** TO UNLOCK INVESTMENT FROM EXISTING AND NEW INVESTORS

## PRINCIPLES:

**OUTREACH**

**COLLABORATION**

**COMMUNICATION**

