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Methodology for the Assessment of Forestry Competitiveness in Ukraine

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► **Abstract.** Considering the economic, social and environmental potential of the forestry sector of Ukraine, and the rather low level of its efficiency, an important task is to create conditions for the competitive development of the forestry industry. A precondition for such development is an objective assessment of the regional competitiveness of forestry complexes, which requires the elaboration of appropriate methodological and methodological approaches. The regional approach to competitiveness assessment ensures that the specific features of all natural zones on the territory of Ukraine, characterised by different soil and climatic conditions and unequal forest cover, are taken into account. The purpose of this study is to substantiate and test methodological and methodological approaches to assessing the competitiveness of forestry in Ukraine. The methodological basis of the research was the methods of analysis and synthesis, system generalisation and dialectical method. Methodological and methodical approaches to the assessment of the competitiveness of forestry in Ukraine are substantiated. The main challenges of forestry enterprises that form the potential of the industry are identified. The factors that form the level of competitiveness of forestry are highlighted. Positive and negative trends in the competitive development of regional forestry complexes are identified. Based on the assessment of the competitiveness of forestry complexes, their classification in the major natural zones of Ukraine was completed. The conducted research will serve as a basis for assessing the efficiency of individual forestry enterprises in the context of strengthening their competitiveness. The main advantages (disadvantages) of competitive development of business entities can become an objective prerequisite for making appropriate management decisions

► **Keywords:** forestry enterprises, natural Area, regional approach, forest resources, efficiency, competitive advantages, criteria

► Introduction

Ukraine is a low-forest country in terms of forest cover, as it ranks only 31st on the European continent in terms of forest area per inhabitant. At the same time, according to such absolute indicators as the total area of the forest fund and the total stock of wood on it, it occupies the 9th and 7th positions in the ranking of European countries, respectively [1; 2]. A fairly high level of forestry potential is levelled by the current data on the efficiency of its use. According to the annual review of the forest products market (2020-2021) of the Food and Agriculture Organisation of the United Nations [3], Ukraine ranks 30th in Europe in terms of forestry production (\$ 5.5 billion annually). And in terms of the efficiency of forest resources use and according to the FAO Forest Products Yearbook (2019) [4], Ukraine ranks 32nd, with USD 681 per cubic meter of impersonal wood. The Republic of Poland, having approximately the same area of forest land, annually produces products

worth USD 39.4 billion and receives USD 1,203 per cubic meter of impersonal wood [5].

The extremely low level of efficiency of the use of forest resources in Ukraine is primarily driven by the lack of a national strategy for the development of the forest industry, which is necessary to determine objective forecasts of the economic growth of all economic entities. Only on the basis of the approved strategy, it is possible to determine and, accordingly, meet the planned volumes of timber production, including the sale of part of it for export. An important prerequisite for the development of such strategic guidelines is the implementation of an objective assessment of the competitiveness of forestry in the domestic market, as forestry enterprises have different potential opportunities for their development. First of all, it depends on their geographical location and the specific soil and climatic conditions. The issues of developing methodological approaches and

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guidelines for assessing the competitiveness of industries have been studied and covered in the scientific contributions of many renowned scientists.

Michael Porter made an invaluable contribution to the development of theoretical approaches to assessing the competitiveness of an enterprise (industry). His famous model of the “five forces” allows for analysis of the competitive environment of the industry and includes the following elements: the power of buyers; the power of suppliers; competitive rivalry; the threat of new entrants; the threat of substitute products [6; 7]. Then M. Porter developed a cluster approach to competitiveness management and proposed a methodology for calculating microeconomic competitiveness [8], according to which the assessment should include: the operational and strategic maturity of companies; the quality of the business environment and the state of cluster development. M. Porter also developed a cluster approach to competitiveness management and proposed a methodology for calculating microeconomic competitiveness [8], according to which the assessment should include: the operational and strategic maturity of companies; the quality of the business environment and the state of the cluster development.

The ADL/LCD model proposed by Arthur D. Little [9], according to which such an assessment of an enterprise (industry) should be carried out for each of the stages of the life cycle of the subject of assessment, is considered to be a significant contribution to the study of competitiveness assessment. Traditionally, it goes through four stages: birth, growth (or development), maturity, ageing (decline). That is, at different stages of the life cycle of the enterprise (industry) there are different competitive positions, which certainly affect the overall level of competitiveness of the subject of valuation.

Michael Enright was the first to introduce the concept of a regional cluster as a set of economic entities of related industries, united by geographical principle, which leads to a synergistic effect of their joint activities. M. Enright's concept of regional clusters is based on the assumption that competitive advantages are formed only at the regional level, since each region has its own historical development, which affects the formation of regional traditions of conducting business and specific features of production and certain qualifications of local residents, etc. Analysis of the competitiveness of various industries located in certain regions allowed identifying regional and local benefits [10]. At the same time, Michael Storper identified regional clusters as the only tool for the effective development of small and medium-sized businesses in the industry [11].

The adherents of cluster approaches to assessing competitiveness Edward Bergman and Edward Feser substantiated their own visions of the possibility of development of a particular industry only by the cluster model, in particular, it is reflected in the theories of

innovation environment and foreign economy; concepts of inter-firm and cooperative competition [12].

Tanapola Virasa and John Tang used the index method to assess the competitiveness of the industry, in particular, they substantiated the use of the index of technological and trade activities [13], which to some extent can lead to the subjectivity of the assessment. Their technological potential and production characteristics were included in the coefficient of technological activity. The authors proposed to calculate trade characteristics using trade performance indicators, for which they determined multi-attribute indicators. These two indexes were used to determine the state of the industry for a specific time period. A higher value of the technological activity index means a greater expansion of technological opportunities and an increase in production in the industry. A higher value of the trade activity index determines the international competitiveness of the industry.

The purpose of the study is to substantiate methodological and improve methodological approaches to assessing the regional competitiveness of forestry, which would include socio-ecological and economic features of the industry.

► Materials and Methods

The study was conducted in three stages, the first of which summarises the existing methodological base for assessing the competitiveness of the industry and substantiates the regional approach as the most optimal for assessing the forestry of Ukraine. The second stage consisted in calculating all certain criteria (indicators) of competitiveness of the forest industry. The third stage included ranking regional forestry complexes by their level of competitiveness and identifying the main trends in their development.

The research is based on the use of the dialectical method of cognition, which involves the analysis of processes and phenomena in their development and interrelation and interdependence. For a deeper understanding of the challenges of forestry development in Ukraine, such general scientific research methods as observation, scientific cognition, analysis, synthesis, comparative analysis, and systematic generalisation were also applied. In the calculation of partial indicators that form the criteria for Integral assessment of regional forestry complexes (profitability of activities, coefficients of financial condition, fund return, workforce productivity, average monthly salary and profitability of sales), the method of average values is used. Competitiveness criteria are calculated using their index, that is, the ratio of the value of the corresponding indicator to its highest value among the entire set of indicators of forestry enterprises in the region.

The calculation of the integral indicator of the competitiveness of the forestry enterprise assumed using the formula [14]:

$$K_i = \sqrt[8]{K1 * P1 * K2 * P2 * K3 * P3 * K4 * P4 * K5 * P5 * K6 * P6 * K7 * P7 * K8 * P8} \quad (1)$$

where K_i is an integral indicator of the competitiveness of a forestry enterprise; $P1-P8$ – values of the evaluation criteria of competitiveness; $K1-K8$ – corresponding weight coefficients.

Scientists have already calculated the values of the above weighting coefficients of the competitiveness criteria of forestry enterprises [15].

Given the geographical features of the forestry industry, the methodology for assessing the competitiveness of the forestry sector of Ukraine is based on the regional approach, which consists in comparing the level of competitiveness of the entire set of forestry entities (individual forestry enterprises as legal entities) of one administrative unit (region) in the main natural zones of Ukraine, in particular [16]:

- Polissya – on the example of the activities of forestry enterprises of the Zhytomyr Regional Forestry and Hunting Range Administration (hereinafter – ZhrFRFA);

- Forest-steppe – on the example of the activities of forestry enterprises of the Cherkasy Regional Forestry and Hunting Range Administration (hereinafter – CRFRA);

- Steppe – on the example of forestry enterprises of the Mykolaiv Regional Forestry and Hunting Administration (hereinafter – MRFHA).

This methodological approach made it possible to assess the level of regional competitiveness of forestry complexes throughout the country and to identify the main factors (in addition to such commonly recognised factor as forest cover, it is necessary to consider the level of labour productivity, average monthly wages, area of forest regeneration, etc.) that affect the formation of competitive advantages of a particular region.

The study was conducted on the basis of statistical data of the State Agency of Forest Resources of Ukraine, performance indicators of Zhytomyr, Cherkasy and Mykolaiv regional forestry and hunting departments, and scientific contributions of Ukrainian and foreign scientists on the issue of determining methodological approaches to assessing the competitiveness of industries. Data from Internet resources, including expert opinions and reports on important events that significantly affect the competitive development of Ukrainian forestry, were also used.

► Results and Discussion

Currently, there are two main groups of methodological approaches to assessing the competitiveness of an enterprise (product, industry), in particular, qualitative and quantitative. Qualitative methods are characterised by subjectivity and the absence of any formalisation, which determines their limited use in determining the ways and directions of improving the competitive position of the subject of evaluation. Quantitative methods are considered more effective and practical, as they provide grounds for the implementation of necessary organisational, managerial and economic decisions aimed at improving the competitive position of the subject of valuation since they possess a certain objective basis.

In terms of assessing the competitiveness of forestry, it is necessary to additionally consider the socio-environmental characteristics of the functioning of economic entities in the industry, due to various protective, sanitary, health and recreational functions of forest plantations. It is suggested to consider a number of indicators: distribution of forest plantations by age groups; area of reforestation and afforestation; share of forestry enterprises in the total amount of taxes and fees (at the local and state levels), the average level of remuneration of workers in the industry and their share in the national economy, an annual average growth of timber per 1 ha of forest land, etc. [17]. Using these indicators in dynamics, it is possible to calculate the general trend of growth (decline) in the level of competitiveness of the socio-ecological component of forestry.

To date, it has been proved that the economic efficiency of forest resources is a rather conditional conception, the implementation of which is possible only in certain timber regions of Ukraine. This claim is conditioned by the low proportion of forest lands covered with vegetation in the southern and southwestern territories of the country, which leads to constant budget subsidies for forestry enterprises on them [2].

Based on the analysis of existing methodological approaches conducted by I.A. Gubareva and I.V. Yaroshenko [18] and the research team of the Dolishnyi Institute of Regional Research of NAS of Ukraine [19], it can be concluded that the most accurate and comprehensive assessment of the competitiveness of forestry is the integrated competitiveness of enterprises and regions that form the industry.

It is worth noting that the issue of assessing the competitiveness of an individual forestry enterprise has not been practically investigated. At the same time, forestry enterprises are characterised by a number of features, which necessitates the development/improvement of the methodology of competitiveness assessment. In particular, the following features should be noted:

- state (municipal) form of ownership and as a result – the practical absence of credit funds;
- a long period of forest cultivation and, accordingly, obtaining the main share of income in the long term;
- dependence of financial performance on natural, climatic and soil conditions;
- the presence of a practically monopoly position in the domestic market of forest products;
- significant physical and moral deterioration of fixed assets, etc. [20]

Noteworthy is the methodological approach to assessing the level of competitiveness of forestry entities, substantiated in the studies by I.V. Andriychuk and I.R. Pinchuk [14]. They argue that such an assessment should be based on the definition of a set of socio-economic criteria involving the possibility of applying the methods of strategic analysis and further calculation of the integral indicator of competitiveness. The definition of socio-economic criteria is based on the selection and calculation of the relevant

partial indicators, which have been improved (the authors applied the methodology on the example of three forestry enterprises in Ivano-Frankivsk oblast in the period 2014-2017, when the export of unprocessed forest products was allowed):

- production efficiency criteria (profitability of operations);
- criteria related to the assessment of the financial condition of the business entity (working capital turnover ratio, autonomy and absolute liquidity coefficients, solvency coefficient);
- criteria that reflect social efficiency (average salary of staff);
- criteria that determine the competitive potential of the enterprise (workforce productivity and return on capital);
- criteria characterising the sustainability of production (volumes of natural regeneration and artificial reforestation);
- criteria that reflect the efficiency of sales of products and services (profitability of sales);
- a criterion that reflects the competitiveness of products (a relative indicator of the ratio of product quality to its cost based on expert evaluation);
- a criterion that characterises the image of an enterprise (a qualitative indicator determined by comparing the results of a survey of industry experts on the image of a manager, employees, and product quality).

The last two criteria require a separate explanation, as they have lost their significance in the current conditions of Ukrainian forestry. Firstly, state forestry enterprises are considered to be monopolists in a certain regional market, since forestry enterprises of communal ownership occupy an insignificant share of the area of forestry land, and their participation in the production of sectoral products is generally negligible. Thus, the image of the enterprise, subordinated to the State Agency of Forest Resources of Ukraine, is virtually impossible to compare with other entities in the industry (private ownership in forestry is practically absent). As for the competitiveness of products, it is also approximately

the same for forestry enterprises of the same natural zone, which is due to the typical breed composition of forest stands on it. The quality of finished products primarily depends on the available technologies, machines and equipment that are used in the cultivation, harvesting and processing of wood. In modern conditions, forestry enterprises are purchasing a limited range of equipment, in particular, forest planting machines (KLB-1.7, SBN-1A, MLU-1, PLA-1), cultivators (KL-2,6, KRL-1, KBL-1, KLB-1.7 and DKLN-6/8), along with Kolesov's sword for manual forest planting, which is determined by the standardised forestry technologies in Ukraine.

Forestry uses feller-bunchers and feller-bunching machines, jaw loaders, heavy-duty timber transport, a set of hand-held motor tools for cutting trees and pruning branches, as well as standard units, automated lines and machines for primary wood processing. The presented summaries suggest the criterion of competitiveness of products and image of all forestry enterprises to be taken as a unit, which will balance their rating according to the specified criteria. Calculation of the integral indicator of competitiveness of the forestry enterprise using the formula (1).

Having carried out calculations, in particular, having determined all the indicators that form an integral assessment of the competitiveness of each individual business entity in the region, Table 1 was compiled, in which the average (generalised) indicators of competitiveness of enterprises of the Zhytomyr Regional Forestry and Hunting Range Administration are reflected dynamically. There are such positive trends as an increase in the level of average monthly wages and labour efficiency. At the same time, the decrease in the profitability of operations and sales, the turnover ratio of working capital, the rate of return and the area of forest regeneration at the end of the study period is negative, which indicates an unsatisfactory trend of decline in the business activity of the forestry complex of the region, a decline in the efficiency of fixed assets and a rapid decline in the overall performance (profitability) of economic entities.

Table 1. Dynamics of competitiveness indicators of forestry enterprises of ZhRFRA

No.	Indicator	2017	2018	2019	2020
1	Profitability of operations, %	3.09	2.69	1.12	0.69
2	Coefficient of autonomy	0.58	0.57	0.57	0.56
3	Solvency ratio	1.09	1.11	1.13	1.19
4	Absolute liquidity ratio	0.28	0.26	0.27	0.28
5	Working capital turnover ratio	9.58	8.61	7.86	7.41
6	Fund return	7.13	7.04	6.99	6.81
7	Workforce productivity	265.7	284.45	315.76	374.31
8	Return on sales, %	30.10	21.82	18.84	16.60
9	Average monthly salary, UAH	7,153	7,932	8,841	9,945
10	Area of reforestation, ha	7,143	7,032	6,974	6,764

Source: authors' calculations based on the data of the State Agency of Forest Resources of Ukraine [21]

Similarly, the calculations of indicators (criteria) of competitiveness of all business entities attributed to the Cherkasy Regional Forestry and Hunting Range Administration for the period of the study were carried out, the analysis of the competitiveness of which practically does not differ from the previous one. The calculation of the indicators (criteria) of competitiveness of all business entities referred to the Mykolaiv Regional Forestry and Hunting Range Administration revealed positive trends in their development, in particular: a fairly significant increase in profitability and profitability of sales, the volume of reforestation in the region, the level of average

monthly salary and the rate of return on capital, a slight increase in workforce productivity.

Substituting the obtained results into the formula (1) (with two or more indicators in one criterion, it is necessary to use the index transformation), the calculations were carried out (Table 2) and an integrated assessment of the regional competitiveness of forestry complexes was provided in the context of regions and in dynamics. Using the obtained values, it is possible to assess the level of competitiveness of typical regional forestry complexes in the main natural zones of Ukraine and to analyse the results obtained.

Table 2. Integrated assessment of the competitiveness of regional forestry complexes

No.	Enterprise	2017	2018	2019	2020
1	Zhytomyr RFRA	0.0951413	0.0943989	0.0902536	0.0897820
2	Mykolaiv RFRA	0.0369046	0.0378451	0.0484851	0.0542621
3	Cherkasy RFRA	0.1065572	0.1058128	0.1048257	0.1044882

Naturally, the region with the highest integral index is the most competitive. On the basis of these calculations, the ranking of forestry complexes of

Zhytomyr, Cherkasy and Mykolaiv regions was carried out according to the descending trend, as illustrated in Table 3.

Table 3. Ranking of regional forestry complexes by level of competitiveness

No.	Enterprise	Integral indicator	Rank
1	Cherkasy RFRA	0.1065572-0.1044882	1
2	Zhytomyr RFRA	0.0951413-0.0897820	2
3	Mykolaiv RFRA	0.0369046-0.0542621	3

The above data suggests that the forestry enterprises of the Cherkasy Regional Forestry and Hunting Range Administration have the highest rating, which is due to the presence of the best competitive positions in terms of profitability and sales efficiency, along with the criteria of social efficiency and competitive potential (in 2020 – second to the Zhytomyr region, which is also the trend in 2021). Accordingly, the conclusion was made about more effective organisational, managerial and economic activities of business entities in this area. The lowest rating was given to the forestry enterprises of Mykolaiv Regional Forestry and Hunting Range Administration, which is primarily due to the extremely low stock of forest resources in their territories.

According to the results of the calculations, there is a negative trend towards a decrease in the level of regional competitiveness of forestry complexes of Cherkasy and Zhytomyr oblasts and an increase (as a result of the restoration of state funding) in the level of competitiveness of enterprises in Mykolaiv oblast.

Thus, despite the lower level of timber reserves in Cherkasy oblast compared to Zhytomyr oblast (in terms of area and volume), the regional competitiveness of forestry is higher, because according to the analysis, it depends primarily on the quality composition of forest resources (more valuable hardwoods

prevail) and the efficiency of the use of financial, economic and industrial potential of economic entities.

► Conclusions

According to its intended function, the forestry of Ukraine performs, first of all, soil and water protection, protective, sanitary and hygienic, health, recreational, aesthetic, historical, cultural and other functions, and at the same time serves as a source of raw materials for furniture, pulp and paper, pharmaceutical, chemical and other sectors of the national economy.

The functioning and development of the forestry sector of Ukraine is determined by certain properties that require a special methodological approach to assessing its competitiveness, in particular: only 0.1% of forestry land is privately owned, which determines the monopoly position of business entities regionally; a fairly high level of depreciation of fixed assets in the industry; lack of public-private cooperation and cheap financial resources, which makes it impossible to timely update equipment, machinery and technologies; obtaining the bulk of revenues from financial and economic activities in the long term (80-100 years); reliance of the performance of forestry enterprises on their geographical location (climatic and soil conditions), etc.

Given the specific features of Ukrainian forestry, a regional methodological approach (using natural

zoning – Polissya, Forest-Steppe and Steppe) to assessing its competitiveness is proposed, the purpose of which is an assessment of the competitiveness of all economic entities in the industry of a typical administrative region from each of the identified natural zones and their comparison with each other using the assessment methodology that is closest to reflecting the socio-ecological and economic function of forestry.

Based on the analysis of existing methodological approaches, it is concluded that for a comprehensive assessment of the competitiveness of the forestry sector of Ukraine should use a method based on the calculation of the integral indicator of the competitiveness of enterprises that form regional forestry complexes. The improved and tested methodology for assessing the competitiveness of forestry enterprises contains certain disadvantages associated with the attributability (triple) of the forest industry, in particular: the sufficient complexity and labour intensity of calculations of certain criteria (indicators) and the availability of subjective expert

assessment of the competitiveness of products and the image of state forestry enterprises.

The ranking of the studied regional forestry complexes shows that the Cherkasy Regional Forestry and Hunting Range Administration received the highest competitiveness score (but the trends of certain criteria are negative), and the Mykolaiv Regional Forestry and Hunting Range Administration – the lowest. Thus, the level of regional competitiveness depends not only on the area and reserves of forest resources (in the Zhytomyr region – they are the highest) but also on the effective use of environmental and social competitive advantages, along with the quality of forest resources and the efficiency of financial and economic operations of individual forestry enterprises in Ukraine.

Conclusions, proposals and practical recommendations can be used in the elaboration of the national strategy for the development of forestry in Ukraine, and also serve as a basis for assessing the efficiency of the industry at both micro and macro levels.

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Методологія оцінки конкурентоспроможності лісового господарства України

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► **Анотація.** Враховуючи економічний, соціальний та екологічний потенціал лісового господарства України, а також достатньо низький рівень його ефективності, важливим завданням є створення умов для конкурентоспроможного розвитку лісової галузі. Передумовою такого розвитку є об'єктивна оцінка регіональної конкурентоспроможності лісогосподарських комплексів, що вимагає розробки відповідних методологічних та методичних підходів. Регіональний підхід до оцінки конкурентоспроможності забезпечує врахування особливостей всіх природних зон на території України, що характеризуються різноманітними ґрунтово-кліматичними умовами та неоднаковими показниками лісистості. Мета статті – обґрунтувати та апробувати методологічні і методичні підходи до оцінки конкурентоспроможності лісового господарства України. Методологічну основу дослідження склали методи аналізу та синтезу, системного узагальнення та діалектичний метод наукового пізнання. Обґрунтовано методологічні і методичні підходи до оцінки конкурентоспроможності лісового господарства України. Встановлено основні проблеми функціонування лісогосподарських підприємств, які формують потенціал галузі. Виокремлено чинники, що формують рівень конкурентоспроможності лісового господарства. Виявлено позитивні та негативні тенденції конкурентоспроможного розвитку регіональних лісогосподарських комплексів. На основі проведеної оцінки конкурентоспроможності лісогосподарських комплексів здійснено їх ранжування в основних природних зонах України. Здійснені дослідження слугуватимуть основою для проведення оцінки ефективності діяльності окремих лісогосподарських підприємств в контексті зміцнення їх конкурентоспроможності. Визначені основні переваги (недоліки) конкурентоспроможного розвитку суб'єктів господарювання можуть стати об'єктивною передумовою прийняття відповідних управлінських рішень

► **Ключові слова:** лісогосподарські підприємства, природна зона, регіональний підхід, лісові ресурси, ефективність, конкурентні переваги, критерії