

L'UKRAINE EN GUERRE :

QUELLE RÉSILIENCE ÉCONOMIQUE ?

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Académie d'agriculture – Paris – 15 février 2023

2014 – 2022 Le rebond de l'économie de l'Ukraine (ICU 16/11/2022)

16 November 2022

Macro Update Delivering the Impossible

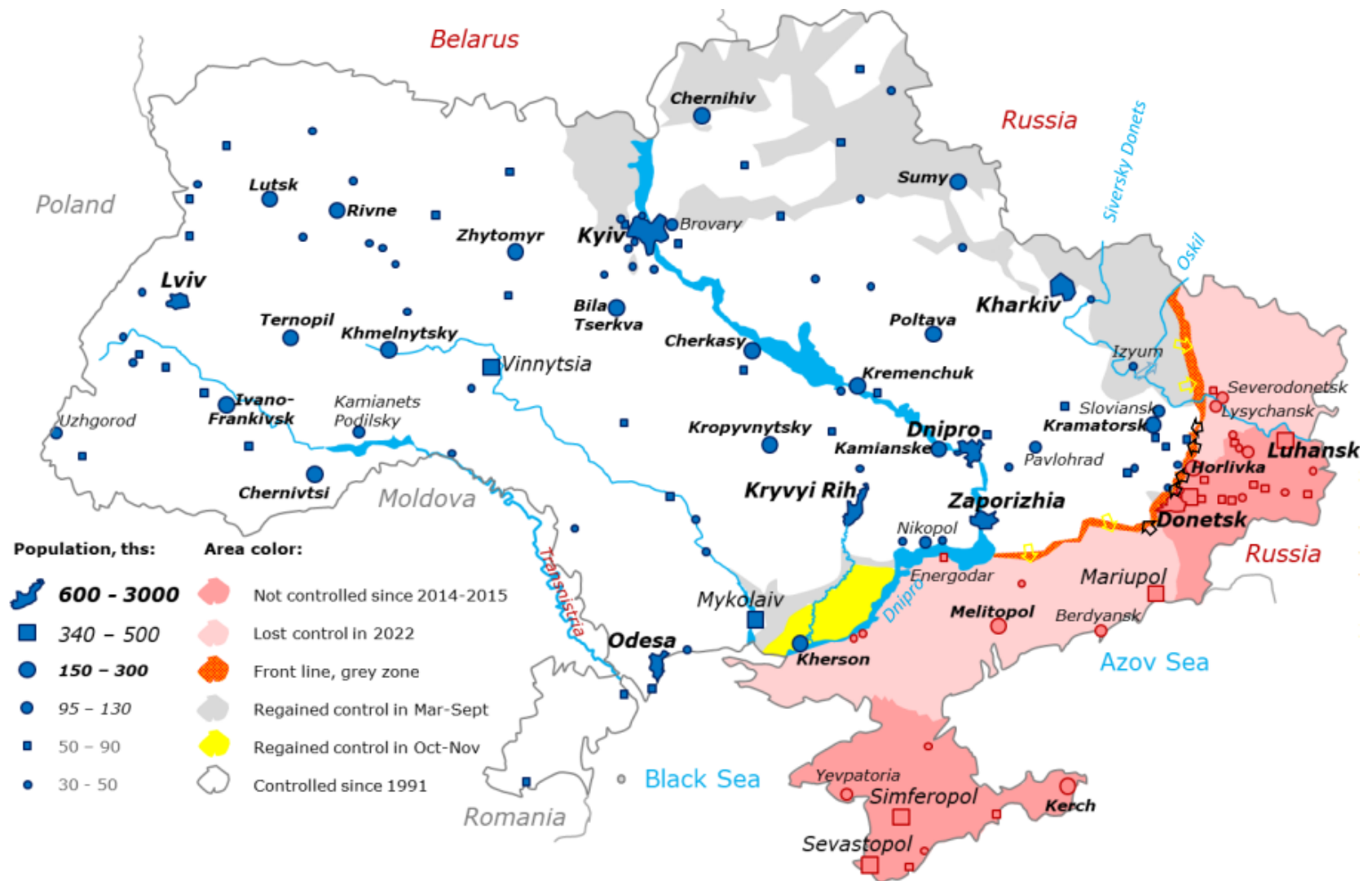


Yearly forecast 2022–23

	Historical data for 2012–21										Forecast by ICU	
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022F	2023F
Activity												
Real GDP (% YoY)	0.2	(0.0)	(6.6)	(9.8)	2.4	2.5	3.4	3.2	(4.0)	3.4	(35.0)	4.0
Nominal GDP (UAHbn)	1,405	1,465	1,587	1,989	2,385	2,984	3,561	3,978	4,194	5,460	4,578	5,761
Nominal GDP (US\$bn)	174	180	133	90	93	112	131	155	155	200	142	150
Unemployment (%)	7.6	7.3	9.3	9.1	9.3	9.5	8.8	8.2	9.5	9.8	28.0	24.0
Inflation												
Headline inflation (% YoY, e.o.p)	(0.2)	0.5	24.9	43.3	12.4	13.7	9.8	4.1	5.0	10.0	29.5	24.3
Headline inflation (% YoY, avg.)	0.6	(0.3)	12.1	48.7	13.9	14.4	10.9	7.9	2.7	9.4	20.4	26.8
GDP deflator (% YoY)	7.8	4.3	15.9	38.9	17.1	22.1	15.4	8.3	9.8	25.1	29.0	21.0
Exchange rates												
UAH/USD (e.o.p.)	8.1	8.2	15.8	24.0	27.3	28.1	27.7	23.8	28.3	27.3	36.6	40.2

Ayant plus qu'absorbé le choc de 2014, le succès de l'économie ukrainienne est l'un des facteurs qui ont conduit la Russie à lancer son attaque le 24 février dernier, jour où l'Ukraine débranchait son système électrique de celui de la Russie.

L'économie pendant la guerre (Concorde Capital December 2022)



La reconstruction.....demain?

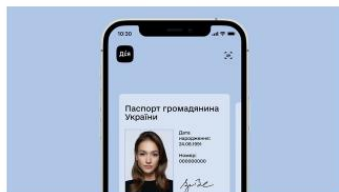
- **Ukraine recovery conference** *Lugano, 04 et 5 juillet 2022*
[<https://www.urc2022.com/conference-materials>]
- KIEL Kiel Institute for the World Economy The Ukraine Support Tracker: Which countries help Ukraine and How? No. 2218 August 2022
- UA War Infographics – Telegram [[//t.me/s/uawarinfographics](https://t.me/s/uawarinfographics)]
- **International Expert Conference on the Recovery, Reconstruction and Modernisation of Ukraine** *Berlin, 25 octobre 2022*
- **Conférence bilatérale pour la résilience et la reconstruction de l'Ukraine**, *Paris, mardi 13 décembre 2022*
- **Rebuild Ukraine Expo XXI**, *Varsovie, 15 et 16 février 2023*

La reconstruction: National Programs [consulter : recovery.gov.ua]



Recovery pre-requisites: Strengthening institutional capacity

<0,1 bn USD



Recovery pre-requisites: Digital government

<0,1 bn USD



Strengthen defense and security

50 bn USD



Strive for EU integration

<1 bn USD



Re-build clean and safe environment

20 bn USD



Energy independence and Green Deal

130 bn USD



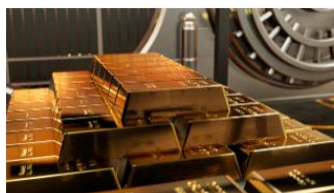
Boost business environment

5 bn USD



Ensure competitive access to funding

75 bn USD



Secure macro-financial stability

60 - 80 bn USD



Grow value adding sectors of economy

50 bn USD



Logistics de-bottleneck and integration with EU

120 - 160 bn USD



Recovery and upgrade of housing and regions infrastructure

150 - 250 bn USD



Recovery and modernization of social infrastructure

35 bn USD



Improve Education system

5 bn USD



Upgrade HealthCare system

5 bn USD



Develop Culture and Sport systems

20 bn USD



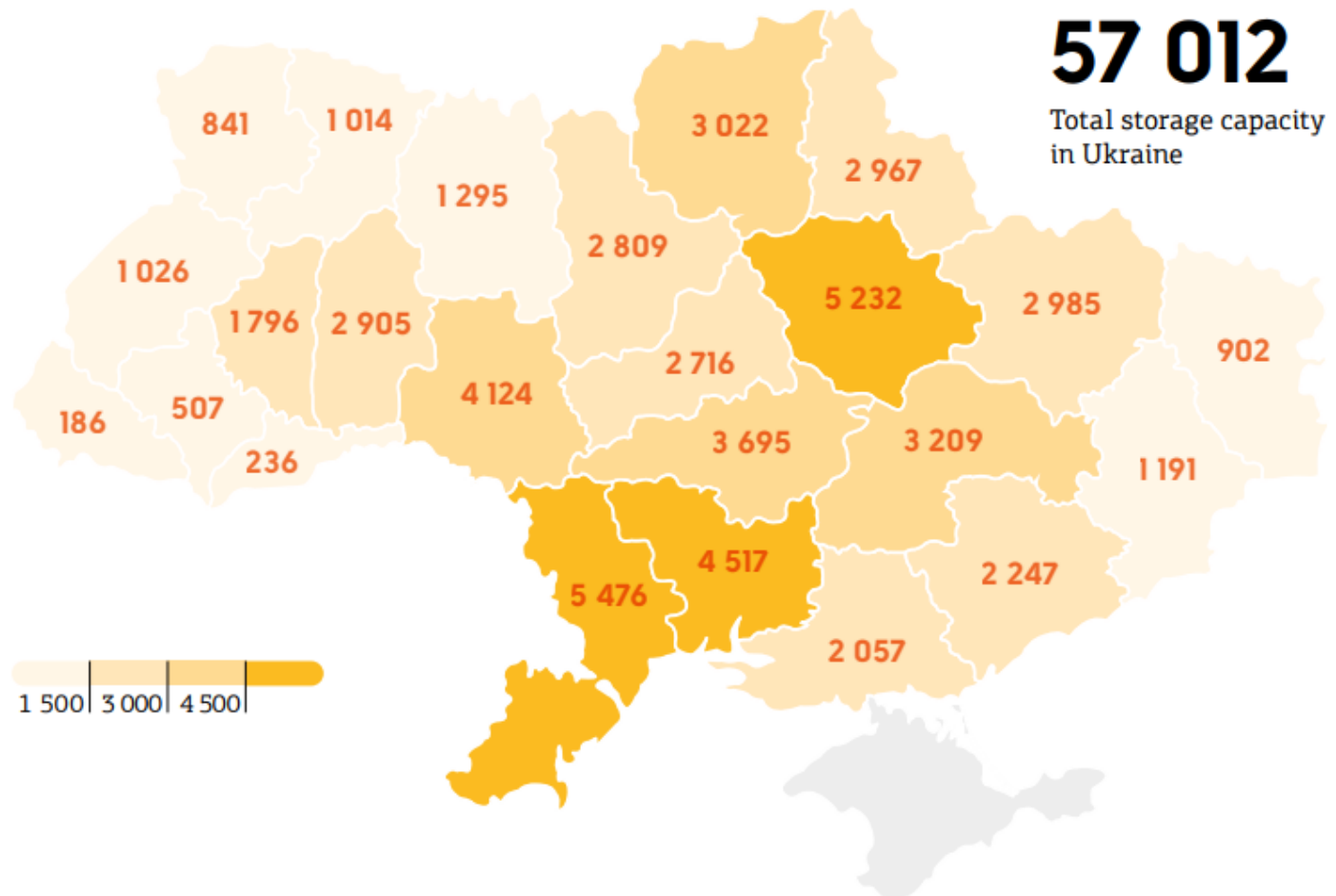
Secure targeted and effective social policy

7 bn USD

Le rebond de l'économie de l'Ukraine: situation en février 2022

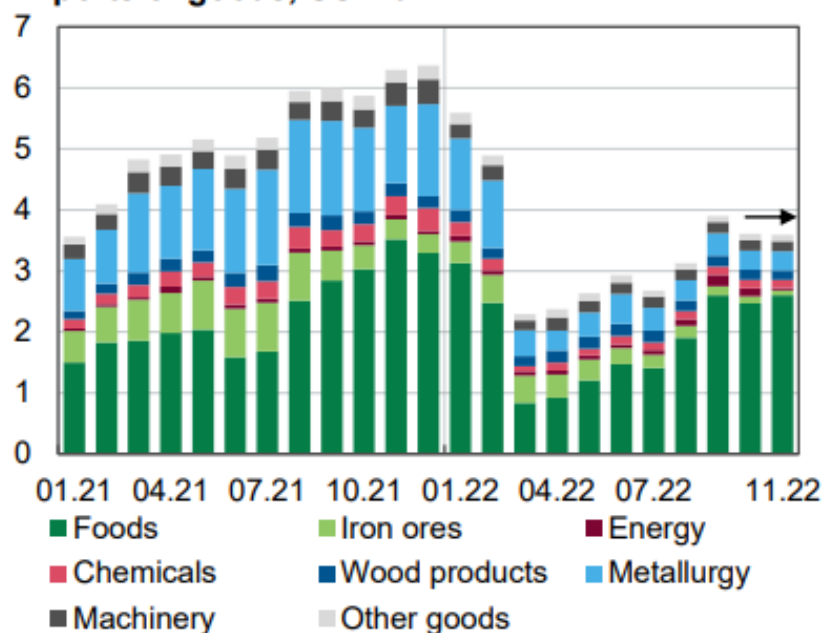
[Ukraine Infographic AgroBusiness report 2021]

Total storage capacity as of 01.10.2021, thou. t



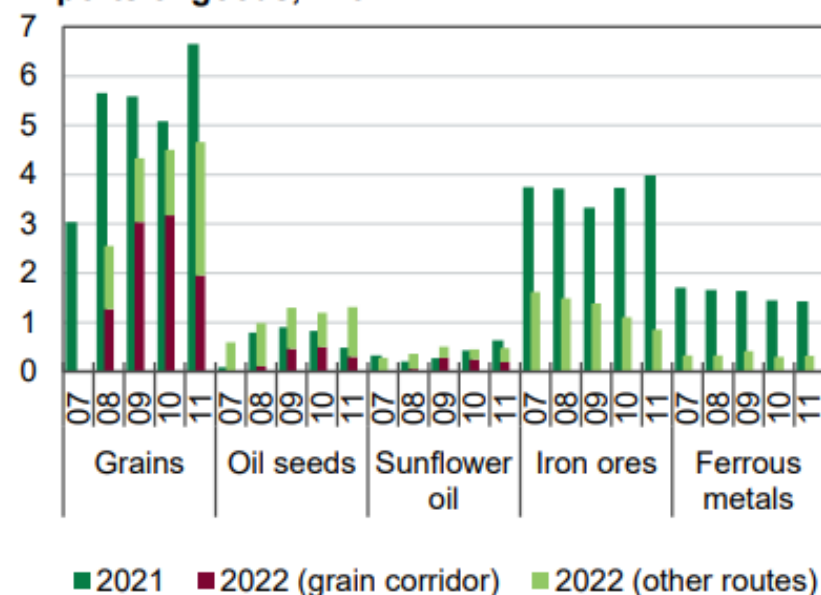
Larger supplies through alternative routes compensated for russia's attempts to block the grain corridor shipments

Exports of goods, USD bn



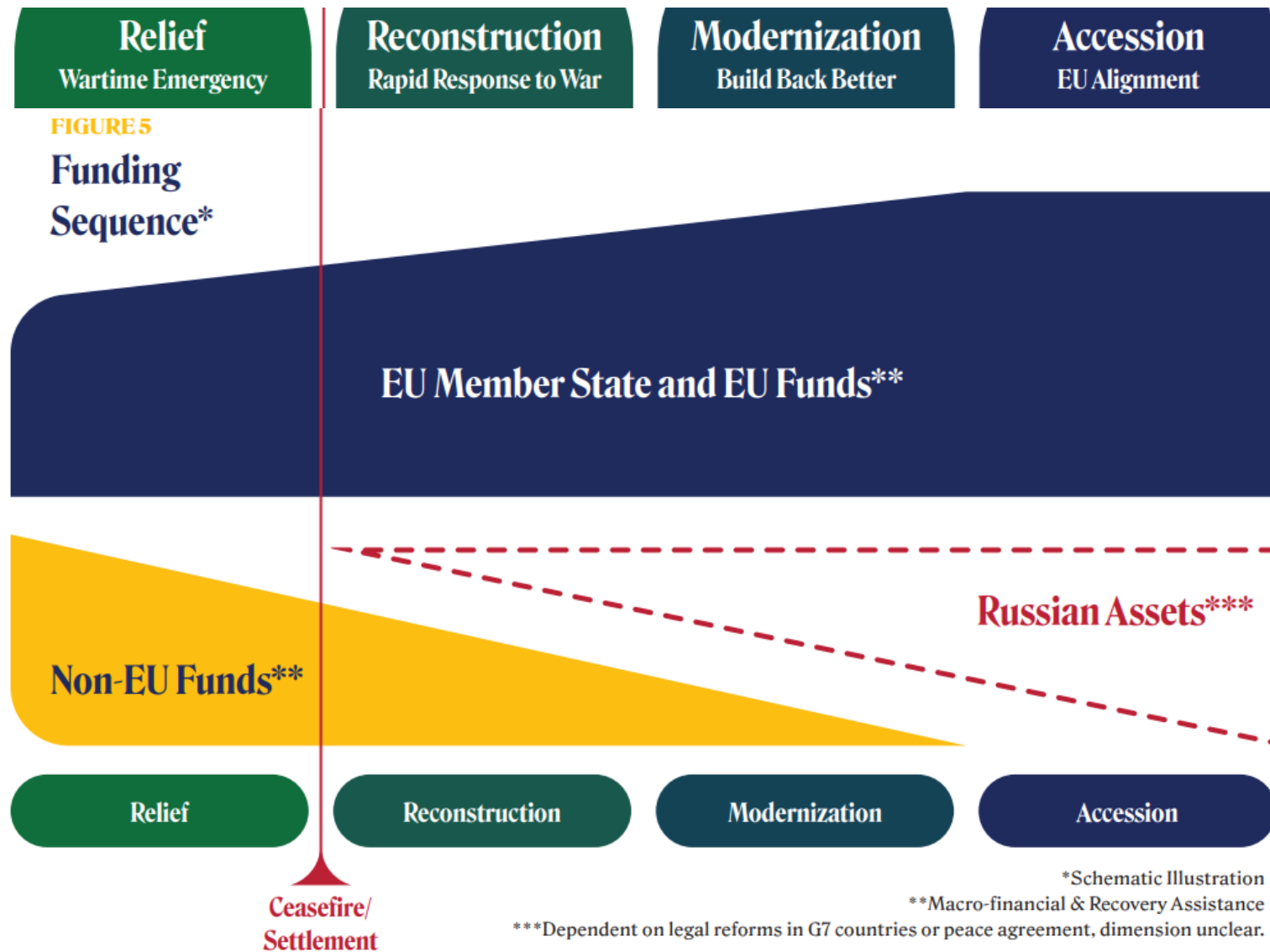
Source: NBU staff calculations.

Exports of goods, m t



Source: SCSU.

La reconstruction: A Marshall Plan for Ukraine ? Working Paper Sept 2022



Дуже дякую!

