

Retail in Ukraine

March 2024

Table of Contents

Retail in Ukraine

EXECUTIVE SUMMARY

Retail in 2023: The big picture

War-induced disruption further strengthens penetration of e-commerce in Ukraine

Domestic retailers continue to gain ground across the market

What next for retail?

OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2023

Seasonality

International Women's Day

New Year

MARKET DATA

- Table 1 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023
- Table 2 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023
- Table 3 Sales in Retail Offline by Channel: Value 2018-2023
- Table 4 Sales in Retail Offline by Channel: % Value Growth 2018-2023
- Table 5 Retail Offline Outlets by Channel: Units 2018-2023
- Table 6 Retail Offline Outlets by Channel: % Unit Growth 2018-2023
- Table 7 Sales in Retail E-Commerce by Product: Value 2018-2023
- Table 8 Sales in Retail E-Commerce by Product: % Value Growth 2018-2023
- Table 9 Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023
- Table 10 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 11 Sales in Grocery Retailers by Channel: Value 2018-2023
- Table 12 Sales in Grocery Retailers by Channel: % Value Growth 2018-2023
- Table 13 Grocery Retailers Outlets by Channel: Units 2018-2023
- Table 14 Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023
- Table 15 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023
- Table 16 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 17 Sales in Non-Grocery Retailers by Channel: Value 2018-2023
- Table 18 Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023
- Table 19 Non-Grocery Retailers Outlets by Channel: Units 2018-2023
- Table 20 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023
- Table 21 Retail GBO Company Shares: % Value 2019-2023
- Table 22 Retail GBN Brand Shares: % Value 2020-2023
- Table 23 Retail Offline GBO Company Shares: % Value 2019-2023
- Table 24 Retail Offline GBN Brand Shares: % Value 2020-2023
- Table 25 Retail Offline LBN Brand Shares: Outlets 2020-2023
- Table 26 Retail E-Commerce GBO Company Shares: % Value 2019-2023
- Table 27 Retail E-Commerce GBN Brand Shares: % Value 2020-2023
- Table 28 Grocery Retailers GBO Company Shares: % Value 2019-2023
- Table 29 Grocery Retailers GBN Brand Shares: % Value 2020-2023
- Table 30 Grocery Retailers LBN Brand Shares: Outlets 2020-2023
- Table 31 Non-Grocery Retailers GBO Company Shares: % Value 2019-2023
- Table 32 Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023
- Table 33 Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023
- Table 34 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028
- Table 35 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028
- Table 36 Forecast Sales in Retail Offline by Channel: Value 2023-2028

- Table 37 Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028
- Table 38 Forecast Retail Offline Outlets by Channel: Units 2023-2028
- Table 39 Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028
- Table 40 Forecast Sales in Retail E-Commerce by Product: Value 2023-2028
- Table 41 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028
- Table 42 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 43 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 44 Forecast Sales in Grocery Retailers by Channel: Value 2023-2028
- Table 45 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028
- Table 46 Forecast Grocery Retailers Outlets by Channel: Units 2023-2028
- Table 47 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028
- Table 48 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 49 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 50 Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028
- Table 51 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028
- Table 52 Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028
- Table 53 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience retailers among the most adept at adapting to wartime challenges Leading chains sign industry memorandum to secure domestic food supply chains Growing availability of cashback services boosts trade

PROSPECTS AND OPPORTUNITIES

Convenience stores projected to be the most dynamic grocery retailers channel International chains will continue to grow via franchising

More forecourt retailers expected to expand assortments and private label lines

CHANNEL DATA

- Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023
- Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 56 Sales in Convenience Retailers by Channel: Value 2018-2023
- Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2018-2023
- Table 58 Convenience Retailers GBO Company Shares: % Value 2019-2023
- Table 59 Convenience Retailers GBN Brand Shares: % Value 2020-2023
- Table 60 Convenience Retailers LBN Brand Shares: Outlets 2020-2023
- Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2023-2028
- Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028

Supermarkets in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased price competition aids impressive recovery in trade New outlet openings concentrated in western regions Silpo continues to create unique themed stores

PROSPECTS AND OPPORTUNITIES

Economy supermarkets format expected to gain ground

Competition from variety stores likely to intensify further

Chains will continue to invest heavily in e-commerce and delivery capabilities

CHANNEL DATA

- Table 65 Supermarkets: Value Sales, Outlets and Selling Space 2018-2023
- Table 66 Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 67 Supermarkets GBO Company Shares: % Value 2019-2023
- Table 68 Supermarkets GBN Brand Shares: % Value 2020-2023
- Table 69 Supermarkets LBN Brand Shares: Outlets 2020-2023
- Table 70 Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 71 Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Hypermarkets in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hypermarkets remain particularly exposed to war-related disruption Novus is the best performing chain in current value growth terms Fozzy among the most active players in pursuing CSR initiatives

PROSPECTS AND OPPORTUNITIES

Solid growth in current value sales and outlet numbers anticipated
Staffing shortages will remain a major challenge for hypermarkets
More players likely to establish pick-up points closer to residential areas

CHANNEL DATA

- Table 72 Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023
- Table 73 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 74 Hypermarkets GBO Company Shares: % Value 2019-2023
- Table 75 Hypermarkets GBN Brand Shares: % Value 2020-2023
- Table 76 Hypermarkets LBN Brand Shares: Outlets 2020-2023
- Table 77 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 78 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Small Local Grocers in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wartime conditions compound long-term challenges faced by small local grocers
Threat from food/drink/tobacco specialists intensifies
Rate of decline in outlet numbers deepens dramatically

PROSPECTS AND OPPORTUNITIES

Competition from modern formats will continue to constrain growth potential Category will remain the largest in grocery retailers in terms of outlet numbers Point-of-sale tobacco display ban could negatively impact trade for many players

CHANNEL DATA

- Table 79 Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023
- Table 80 Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 81 Small Local Grocers GBO Company Shares: % Value 2019-2023
- Table 82 Small Local Grocers GBN Brand Shares: % Value 2020-2023
- Table 83 Small Local Grocers LBN Brand Shares: Outlets 2020-2023
- Table 84 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 85 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

General Merchandise Stores in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Variety stores well placed to meet changed demands of consumers during wartime

Luxury-oriented proposition of TsUM at odds with new economic reality

Usupso begins rebranding as O!Some to resolve legal dispute with Miniso

PROSPECTS AND OPPORTUNITIES

Variety stores set to continue winning over consumers

Avrora expected to strengthen its competitive position

Leading chains will maintain heavy investment in digital sales strategies

CHANNEL DATA

- Table 86 General Merchandise Stores: Value Sales, Outlets and Selling Space 2018-2023
- Table 87 General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 88 Sales in General Merchandise Stores by Channel: Value 2018-2023
- Table 89 Sales in General Merchandise Stores by Channel: % Value Growth 2018-2023
- Table 90 General Merchandise Stores GBO Company Shares: % Value 2019-2023
- Table 91 General Merchandise Stores GBN Brand Shares: % Value 2020-2023
- Table 92 General Merchandise Stores LBN Brand Shares: Outlets 2020-2023
- Table 93 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 94 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 95 Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028
- Table 96 Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

Apparel and Footwear Specialists in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Trade remains subdued as Ukrainians rein in discretionary spending

H&M resumes operations in Ukraine

Local brands continue to gain ground

PROSPECTS AND OPPORTUNITIES

Operators with a lower price positioning set to perform well

War will continue to shape consumer preferences and competitive strategies

Polish chain Greenpoint expected to enter Ukraine in 2024

CHANNEL DATA

- Table 97 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023
- Table 98 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 99 Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

- Table 100 Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023
- Table 101 Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023
- Table 102 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 103 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Appliances and Electronics Specialists in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Appliances and electronics specialists harder hit by economic fallout of war

Comfy retains leading position in value terms as Eldorado struggles

Channel continues to see strong demand for generators, inverters and power banks

PROSPECTS AND OPPORTUNITIES

More players expected to develop smaller store formats

Trade-in programmes likely to become more widely available

Omnichannel strategies will remain a focal point for investment

CHANNEL DATA

- Table 104 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023
- Table 105 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 106 Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023
- Table 107 Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023
- Table 108 Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023
- Table 109 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 110 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Home Products Specialists in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home improvement and gardening stores posts fastest growth in current value sales

Homewares and home furnishing stores hit by exodus of core target consumers

Pet shops and superstores continues to profit from pet humanisation trend

PROSPECTS AND OPPORTUNITIES

Repair, refurbishment and reinforcement of buildings will boost trade

Epicentr will continue to expand store-in-store concepts

Jysk plans to open multiple new outlets in Ukraine

CHANNEL DATA

- Table 111 Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023
- Table 112 Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 113 Sales in Home Products Specialists by Channel: Value 2018-2023
- Table 114 Sales in Home Products Specialists by Channel: % Value Growth 2018-2023
- Table 115 Home Products Specialists GBO Company Shares: % Value 2019-2023
- Table 116 Home Products Specialists GBN Brand Shares: % Value 2020-2023
- Table 117 Home Products Specialists LBN Brand Shares: Outlets 2020-2023
- Table 118 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 119 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 120 Forecast Sales in Home Products Specialists by Channel: Value 2023-2028
- Table 121 Forecast Sales in Home Products Specialists by Channel: % Value Growth 2023-2028

Health and Beauty Specialists in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pharmacies channel remains the most resilient performer

Watsons loses ground to local chains in health and personal care stores

Necessity status of certain products supports solid recovery by optical goods stores

PROSPECTS AND OPPORTUNITIES

Operators will continue to develop more innovative store formats and concepts

Brocard likely to lose further ground in beauty specialists

Investment in mobile shopping apps and delivery services expected to rise

CHANNEL DATA

Table 122 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 123 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 124 - Sales in Health and Beauty Specialists by Channel: Value 2018-2023

Table 125 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023

Table 126 - Health and Beauty Specialists GBO Company Shares: % Value 2019-2023

Table 127 - Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023

Table 128 - Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023

Table 129 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 130 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 131 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028

Table 132 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

Vending in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasingly diverse product offer boosts performance of foods vending

Self-service coffee point franchises expand rapidly across Ukraine

Water vending machines continue to perform positively

PROSPECTS AND OPPORTUNITIES

Vending remains well-placed to tap into war-related trends

Further diversification of product assortments anticipated

Investment in digitalisation will continue to rise

CHANNEL DATA

Table 133 - Vending by Product: Value 2018-2023

Table 134 - Vending by Product: % Value Growth 2018-2023

Table 135 - Vending GBO Company Shares: % Value 2019-2023

Table 136 - Vending GBN Brand Shares: % Value 2020-2023

Table 137 - Vending Forecasts by Product: Value 2023-2028

Table 138 - Vending Forecasts by Product: % Value Growth 2023-2028

Direct Selling in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Direct selling has lost substantial proportion of its target audience and workforce

New product development resumes as trade rebounds Digitalisation trend continues to gain momentum

PROSPECTS AND OPPORTUNITIES

Consumer health channel will remain one of the largest and most dynamic Economic challenges likely to increase appeal of direct selling as source of income Direct selling will continue to occupy important niche in the retail landscape

CHANNEL DATA

Table 139 - Direct Selling by Product: Value 2018-2023

Table 140 - Direct Selling by Product: % Value Growth 2018-2023

Table 141 - Direct Selling GBO Company Shares: % Value 2019-2023

Table 142 - Direct Selling GBN Brand Shares: % Value 2020-2023

Table 143 - Direct Selling Forecasts by Product: Value 2023-2028

Table 144 - Direct Selling Forecasts by Product: % Value Growth 2023-2028

Retail E-Commerce in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased reluctance of consumers to visit physical stores bolsters trade E-commerce continues to benefit from improvements in delivery services Rozetka further consolidates its leading position

PROSPECTS AND OPPORTUNITIES

E-commerce set to outperform the wider retail market in current value growth terms

Online grocery retailing will continue to attract heavy investment

More e-commerce players likely to develop brick-and-mortar operations

CHANNEL DATA

Table 145 - Retail E-Commerce by Channel: Value 2017-2022

Table 146 - Retail E-Commerce by Channel: % Value Growth 2017-2022

Table 147 - Retail E-Commerce by Product: Value 2017-2022

Table 148 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 149 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 150 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 151 - Forecast Retail E-Commerce by Channel: Value 2022-2027

Table 152 - Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027

Table 153 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 154 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

• Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/retail-in-ukraine/report.