



# Retail in Ukraine

March 2024

Table of Contents

## 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](http://www.euromonitor.com/retail-in-ukraine/report).