

Consumer Foodservice in Ukraine

February 2024

Table of Contents

Consumer Foodservice in Ukraine

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shortening of curfews benefits bars/pubs

In a show of defiance consumers return to specialist coffee and tea shops, with menus evolving to include trendy drinks

Players exploring new opportunities in neighbouring markets

PROSPECTS AND OPPORTUNITIES

A brighter outlook for bars/pubs despite challenging conditions

Specialist coffee and tea shops set to see increasing competition with new trends and innovation

The search for affordable indulgences should benefit cafés/bars

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Full-service restaurants continue to struggle despite improvements being seen in 2023

Rising costs push operators to focus on using local ingredients

Local, regional and Mediterranean options prove the most popular

PROSPECTS AND OPPORTUNITIES

Traditional players under pressure to modernise as other operators expand their reach into small towns and rural areas

Sustainability under the spotlight

The return of tourism could spark a more significant recovery for full-service restaurants

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Limited-service restaurants bounce back in 2023 as Ukrainians show resilience

McDonald's benefits from the reopening of some of its outlets

Proximity a key factor as consumers look to shop closer to home

PROSPECTS AND OPPORTUNITIES

Burgers set to retain their popularity with new players and new menu options likely to reinvigorate the category

Plant-based offerings set to proliferate

Delivery services likely to continue playing a prominent role in the future of limited-service restaurants

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

- Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Self-Service Cafeterias in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Traditional approach of self-service cafeterias bears fruit as consumers focus on familiar and affordable dishes
 Silpo Resto stands out for its innovative approach as competition increases
 Consumers turn to familiar comfort food

PROSPECTS AND OPPORTUNITIES

Remote working arrangements likely to limit the recovery of self-service cafeterias
 More diversity and digitalisation two trends to look out for
 Players may need to think outside the box to retain their appeal among the important lunchtime crowd

CATEGORY DATA

- Table 56 - Self-Service Cafeterias: Units/Outlets 2018-2023
- Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
- Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
- Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
- Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
- Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
- Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023
- Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023
- Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028
- Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
- Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028
- Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
- Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028
- Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Street stalls/kiosks under pressure as economic concerns grow and restrictions on location limit access
 Döner Market expanding rapidly through its focus on affordable, convenient and tasty kebab/shawarma
 Ukrainians look to support small, local businesses

PROSPECTS AND OPPORTUNITIES

Limited-service restaurants expected to provide stiff competition
 Festivals and events could provide opportunities for development
 Players will need to invest in new technology to stay ahead of the competition

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lodging and leisure locations the most impacted by Russia's war

Convenience a key factor in retail locations

Standalone locations benefit from flexibility, but rapid rise of delivery orders alters the landscape

PROSPECTS AND OPPORTUNITIES

The return of tourism likely to be key to the recovery of lodging and leisure locations

Highways and train stations open up new opportunities for consumer foodservice operators

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 90 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 91 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 92 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 93 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 94 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 95 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 96 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 97 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 98 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 99 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 100 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 101 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 102 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 103 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 104 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 105 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 106 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 107 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023
Table 108 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023
Table 109 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023
Table 110 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023
Table 111 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023
Table 112 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023
Table 113 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023
Table 114 - Consumer Foodservice through Travel: Units/Outlets 2018-2023
Table 115 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023
Table 116 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023
Table 117 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023
Table 118 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023
Table 119 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023
Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028
Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028
Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028
Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028
Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028
Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028
Table 126 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028
Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028
Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028
Table 129 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028
Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028
Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028
Table 132 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028
Table 135 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
Table 138 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
Table 139 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
Table 140 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
Table 141 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
Table 144 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
Table 147 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
Table 150 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
Table 151 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
Table 152 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
Table 153 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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/consumer-foodservice-in-ukraine/report.