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Retail food sales in Ukraine: From pre-war period to recovery prospects

Abstract. Retail food sales serve as a key indicator of a society’s socio-economic condition. Its dynamics reflect the population’s level of well-being, influence tax revenue generation, and reveal trends in economic development. This study aimed to identify the main factors affecting the operations of food retailers and to formulate recommendations for enhancing the competitiveness of food retailers in Ukraine. The findings indicate that the COVID-19 pandemic triggered global shifts in food consumption patterns and stimulated the growth of e-commerce. At the same time, the

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war in Ukraine led to a sharp decline in sales volumes due to infrastructure destruction, economic instability, and population displacement. The most significant sales reductions were observed in categories of fresh products, such as fruit, vegetables, meat, and fish. Despite the adverse effects of the war, Ukraine's food retail sector has demonstrated considerable resilience and is experiencing rapid post-crisis growth, surpassing the global average recovery rate. An analysis of per capita income from food retail indicates strengthening purchasing power and shifts in consumer habits. Particular attention is given to the differences in the growth rates of online and offline retail, where global trends outpace those in Ukraine. Structural changes in the sector are highlighted, including the decline in the number of small retail operators in favour of large chains. A competitive analysis reveals that food retailers are focusing on optimising pricing strategies, expanding product assortments, and implementing digital solutions. To enhance competitiveness, measures have been proposed to improve customer service, develop online sales channels, diversify product offerings, and integrate environmental initiatives. The practical significance of the study lies in its recommendations for strategic directions to strengthen the competitiveness of food retailers in Ukraine, particularly through the adoption of innovative solutions, support for small businesses, and the development of logistics infrastructure

Keywords: e-commerce; competitiveness; retailers; assortment; innovation

INTRODUCTION

Retail food sales are a critical component of Ukraine's economy, directly impacting food security, employment, and the development of small and medium-sized enterprises. However, the full-scale war has triggered significant disruptive changes in this sector: the breakdown of logistical supply chains, a reduction in effective consumer demand, the loss of retail infrastructure in affected regions, and a shift in consumer priorities. In this context, research into the development dynamics of retail food sales, from the pre-war period to current challenges and recovery prospects, is extremely relevant. Examining these processes has enabled the identification of effective mechanisms for industry support, adaptive strategies for businesses, and areas of government policy that will contribute to its stabilisation and further growth in the post-war period.

Scholars O.M. Petukhova & L.M. Zakrevska (2023) have emphasised that the volume of food sales serves as a crucial indicator of a nation's socio-economic standing. This is because the sale of this category of goods significantly impacts overall financial circulation, generates tax revenues for the budget, and is reflected in several key macroeconomic indicators. The dynamics of food sales allow for the assessment of changes in the population's welfare and the analysis of broader economic development trends. In normal circumstances, the development of retail organisations is characterised by a high degree of inertia. Therefore, when situations arise that necessitate change, the business strategies of market participants undergo substantial transformations. As noted by P. Hrynko *et al*. (2021), such changes are most often triggered by external factors, including general economic crises, sudden shifts in state regulation within the studied economic sector, or the emergence of powerful competitors. In today's environment of globalisation and technological change, market competition in food retail is becoming increasingly dynamic and intense. Enhancing competitive effectiveness is a key objective for retailers, demanding attention at both theoretical and practical research levels. According to A. Zhanbozova *et al*. (2024), consumer preferences and business practices have significantly evolved between 2018 and 2024, driven by digitalisation and constantly changing demand, presenting new challenges for food retailers. The authors have given particular attention to the influence of e-commerce on the development of retailers and the ability of businesses to adapt to changing external environments. Research by T. Hushtan *et al*. (2020) indicates that the core factors remain the flexibility of logistical processes, innovation in sales, and effective marketing strategies. Attention to these aspects allows businesses to strengthen their competitive positions, meet consumer demands, and contribute to the overall development of the sector. O. Kovalenko & L. Yashchenko (2024) noted that transformations that fostered positive changes in food retail, under conditions of macroeconomic stability and favourable market conditions, will create opportunities for business development and expanded market presence in the future. However, this will require professional planning, consideration of market specificities, and continuous improvement of management processes. V. Pavlova (2022) identified several pathways for the development of Ukrainian food retail in the post-war period, aiming to achieve the expected socio-economic level as a segment of the national economy. These include: the digitalisation of core trade and technological processes; building and improving logistics; optimal integration of offline and online formats; development of private label brands; and customer base formation based on consumer behaviour analysis. Previous research has not conducted a detailed analysis of food retail across major food product categories, both globally and in Ukraine, nor has it performed a competitive analysis of the main food retailers in Ukraine.

This research aimed to identify the key factors influencing the operations of food retailers and to develop practical recommendations for enhancing their business process efficiency. The objectives of this study are to analyse changes in the structure and sales volumes of food products in Ukraine and globally across different periods: pre-COVID, COVID, the period of full-scale invasion, and post-war recovery; to examine the competitive landscape of the market; and to analyse the impact of emerging technologies on retail strategies.

MATERIALS AND METHODS

The research period covered the following phases: pre-COVID (2018-2019), COVID (2020-2022), and the period of Russia's full-scale invasion of Ukraine (from 2022 onwards), as well as considerations for the post-war reconstruction period. The grouping method was employed to categorise goods or objects based on similar characteristics or properties. In this instance, food products were classified according to their purpose and attributes, simplifying the analysis and providing a more structured framework for further investigation or comparison. Specifically, to streamline analysis and align with the commonly accepted layout of most Ukrainian stores, food product categories were organised by grouping items with similar properties and purposes into broader categories. For example, fruits and vegetables were combined into a single category, meat and fish into another, grocery items encompass cereals, oils, sauces, and spices, ready-made meals were separated, and specialised goods such as baby food and pet food were also categorised distinctly.

Methods of absolute and relative values were used to analyse changes in retail food sales in Ukraine, comparing them with global indicators. The following indicators were examined: the volume of retail food sales in monetary terms in Ukraine and globally; and per capita income from retail food sales in Ukraine and globally. Additionally, for Ukraine, further indicators were investigated: the number of business entities in the retail food sector; the volume of retail food sales in physical terms; and per capita consumption of food products. The analysis of these indicators was essential for a comprehensive study of the food market's dynamics, identifying its development trends, and formulating recommendations for enhancing the efficiency of retail food sales.

Time-series analysis in the study of retail food sales was a methodological approach that allowed for the examination and forecasting of market development trends based on data collected over a specific period. This method involved studying changes in: sales volumes of food products; per capita income from retail food sales; the number of business entities in the retail food sector; the volume of retail food sales in physical terms; and per capita consumption of food products, enabling the identification of seasonal, cyclical, and trend components. The development dynamics of online and offline retail in the global and Ukrainian markets were compared.

The selection of forecasting methods was based on the behaviour of the relevant market. It is important to note that the study employed data analysis for the period from 2018 to 2024, utilising statistical data (Food – Ukraine (consumer), n.d.; Food – Worldwide (consumer), n.d.;

Food – Ukraine (ecommerce), n.d.; Food – Worldwide (ecommerce), n.d.). Forecasting methods were applied for the period from 2025 to 2029. To forecast the food market with projected consistent growth, the exponential smoothing trend model was used, which allowed for the consideration of gradual changes in market behaviour:

$$Y_t = \alpha X_t + (1 - \alpha)\, Y_{t-1}, \tag{1}$$

where Y_t is the smoothed value of the forecasted indicator at time t; X_t is the actual value of the indicator at time t; Y_{t-1} is the smoothed value for the previous period; α is the smoothing coefficient ($0 < \alpha < 10$), which determines the influence of current and previous data.

Taking into account the main factors (GDP per capita GDP_t and consumer spending per), the model took the following form:

$$Y_t = \alpha(\beta_1 GDP_t + \beta_2 C_t) + (1 - \alpha)\, Y_{t-1}, \tag{2}$$

where β_1 and β_2 are the regression coefficients of the factors' influence.

This model allowed for the adaptation of the forecast to changes in economic conditions, particularly the impact of macroeconomic indicators, and reduced the influence of random fluctuations.

Competitive analysis in retail food sales research was a vital tool for examining the market situation and determining the competitive advantages and weaknesses of market participants. The method involved evaluating key competitors, their strategies, products, pricing policies, and marketing approaches. Within the competitive analysis, aspects such as market share, brand positioning, consumer loyalty, innovation, and technologies used by competitors were investigated. This allowed for the identification of opportunities to improve one's own market position and to identify potential threats from competitors. The competitive analysis method also included an assessment of competitors' strengths and weaknesses, enabling the formulation of strategies to enhance business efficiency in a highly competitive environment. To create a competitive analysis of the main food retailers in Ukraine (ATB-Market, Fozzy Group (Silpo, Fora, Le Silpo), Novus, Varus, Metro Cash & Carry Ukraine, Retail Group (Velyka Kyshenia, Velmart), Tavria V, Auchan Ukraine), the following aspects were considered: scale and market presence (number of stores, geography); pricing policy (premium, mid-range, low segment); product range and specialisation (private label brands, exclusive goods); innovation and additional services (online stores, delivery, loyalty programmes); and financial indicators (revenue, growth rates). The application of this method facilitated the development of more precise and effective strategic directions for enhancing the competitiveness of food retailers in Ukraine, aimed at attracting new customers and retaining existing ones.

The bibliographic method in this retail food sales research involved the systematisation and analysis of scholarly sources (Shtal & Proskurnina, 2018; Chorna *et al.*, 2019; Nikishyna & Shcherbak, 2023), statistical data and market trends (Food – Ukraine (consumer), n.d.; Food – Worldwide (consumer), n.d.; Food – Ukraine (ecommerce), n.d.; Food – Worldwide (ecommerce), n.d.), and analytical reports (ATB's revenue for the first half…, 2024; IMF estimates Ukraine's population…, 2024; Revenue of retail leaders in Ukraine…, 2024; Ukrainian food retail market…, 2024; Unbreakable: Ukraine's retail…, 2024). Logical generalisation allowed for the formulation of broad theoretical and practical conclusions, based on specific facts and observations, that can be applied to wider categories or conditions.

RESULTS AND DISCUSSION

Retail is a dynamic system that requires continuous study and improvement. The issue of food retail is particularly critical during wartime and the post-war period. Table 1 presents an author's categorisation of food products, based on the principle of simplifying consumer perception and aligning with the commonly accepted layout of stores. The core idea is to group items with similar properties and purposes into broader categories. For example, fruits and vegetables are combined into one category because they are predominantly located together in store departments and have similar usage (fresh or processed). Similarly, meat and fish are grouped together, as these products are protein sources and consumers often choose them interchangeably. Grocery items, including cereals, oils, sauces, and spices, are collected into a single group due to their long shelf life and use in food preparation. Categories of ready-made meals, confectionery and snacks, and specialised goods like baby food or pet food are separated due to their specific consumption patterns. This approach renders the structure clear and convenient for both analysis and practical application, and was used in the conducted research.

Table 1. Correlation of main food product categories

According to Statista		Most store categories
Segments	**Subsegments**	
Fruits and nuts	Fresh fruits, processed and frozen fruits, and nuts	Fruits and vegetables
Vegetables	Fresh vegetables, processed and frozen vegetables	
Meat	Fresh meat, processed meat, and meat substitutes	Meat and fish
Fish and seafood	Fresh fish, fresh seafood, and processed fish and seafood	
Dairy and eggs	Milk, milk substitutes, yoghurt, cheese, eggs, and other dairy products	Dairy and eggs
Bread and cereal products	Bread, pasta, rice, breakfast cereals, and other grain products	Grocery
Oils and fats	Butter, margarine, cooking oils, and other oils and fats	
Sauces and spices	Tomato ketchup, other sauces, spices, and culinary herbs	
Semi-finished products	Soups and ready-to-eat meals	Ready-made products
Confectionery and snacks	Confectionery products and snacks	
Spreads and sweeteners	Spreads and sweeteners	
Baby food	Food intended solely for infants and young children	Specialised products
Pet food	Food intended solely for use by domestic animals	

Source: developed by the authors based on data from the Food – Ukraine (consumer) (n.d.) and own research

Prior to the COVID-19 pandemic, retail food sales globally and in Ukraine demonstrated steady growth, driven by urbanisation, increasing household incomes, and evolving consumer habits. Globally, large supermarket and hypermarket chains dominated, and online retail was actively developing, particularly in European countries, the USA, and China (Food – Worldwide (ecommerce), n.d.). In Ukraine, the situation differed: traditional markets prevailed in rural areas, while national chains like ATB, Silpo, and others expanded their presence in cities. Simultaneously, consumers were price-sensitive and actively supported local producers, especially in the fresh produce segment (Kovalenko & Yashchenko, 2024).

The COVID-19 pandemic triggered significant changes in retail food sales (Chernychko *et al.*, 2018). Globally, online ordering and home delivery of groceries surged in popularity due to store visit restrictions. The penetration rate of e-commerce increased annually. In nations with high digitalisation levels, a boom in e-commerce development was observed. In Ukraine, the pandemic spurred online retail growth even among small grocery stores, although the infrastructure was less developed than in Western Europe, as noted by M. Ilchuk *et al.* (2023). The authors also highlighted that Russia's full-scale invasion of Ukraine in 2022 created new challenges for wholesale and retail food sales. It caused severe problems in the wholesale food trade, disrupting logistical chains, driving up prices, and reducing product ranges. Problems in the wholesale trade had a ripple effect on the retail sector, ultimately impacting the end consumer. Due to hostilities, infrastructure destruction, and population migration, many stores were forced to close, especially in frontline regions. The logistics of food supply chains were significantly disrupted, leading to price increases and shortages in certain product categories. During this period, volunteer organisations, humanitarian foundations, and national chains, which adapted their logistical processes, played a crucial role in providing food to the population (Dankeieva, 2023). Total direct losses to Ukrainian retail are estimated at 2.1 billion USD, while combat operations severely damaged 2,903 retail facilities with a total area of 1.6 million square meters. Indirect sector losses are approximately 22.6 billion USD (Guliaieva *et al.*, 2024). In 2022, over 29,000 small businesses ceased operations in the food retail sector. In addition to the negative impact of the war, this was also influenced by the pressure from large chains that, due to their expanded scale, were able to lower prices on essential products. Simultaneously, the proportion of small businesses that opted to develop online retail and operate outside traditional stores showed growth, demonstrating adaptation to new market conditions (Kovalenko, 2024). To restore retail, even to its pre-war format, an initial investment of 3.9 billion USD is necessary. However, in safer regions of Ukraine, trade began to recover rapidly, and online sales remained an important procurement channel due to ongoing risks associated with visiting physical stores. In 2023, the market showed positive trends: the number of retail outlets increased by 12%, a stark contrast to the 18% decrease in 2022 caused by territorial occupation and infrastructure destruction (Guliaieva *et al.*, 2024). Despite the destruction, food retail is recovering faster than other retail sector stores in Ukraine, due to the constant demand for food products (Kosar & Vintoniak, 2023).

The analysis of Figure 1 demonstrates a consistent growth in global retail food sales over the past decade, with projected further increases in volume up to 2029. Sales volumes have risen from 6.32 trillion USD in 2018 to a projected 12.36 trillion USD in 2029, indicating an average annual growth rate of 5-6%. The highest growth rates are observed in the fruit, vegetable, and meat categories, driven by increased demand for healthy eating and protein products. Groceries and ready-made meals also exhibit significant growth due to the popularity of convenience and preprepared ingredients for home cooking. Specialised goods remain the smallest category due to their narrow consumer segment. Overall, stable market growth is attributed to factors such as urbanisation, the expanding middle class, the development of e-commerce, and shifting consumer preferences. The forecast for the coming years suggests continued growth across all categories, particularly considering global economic and environmental challenges.

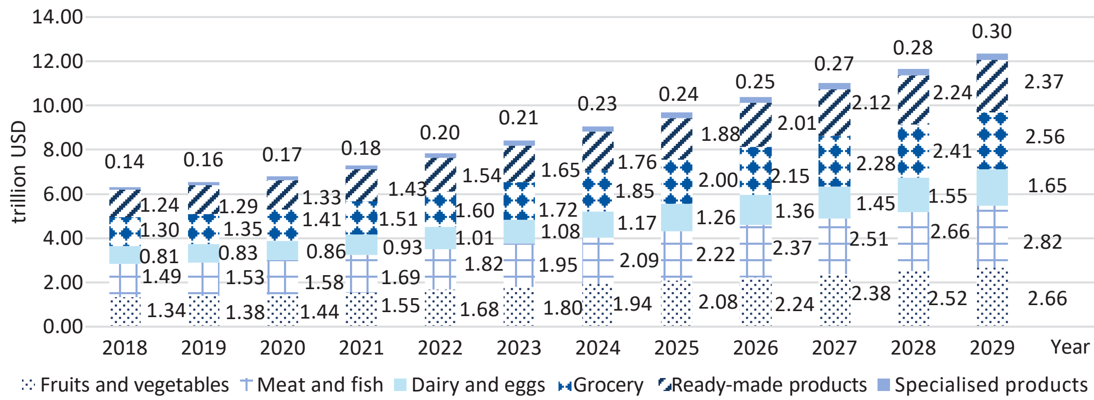

Figure 1. Global retail food sales, trillion USD

Note: 2025-2029 – forecasted data

Source: developed by the authors based on data from the Food – Worldwide (consumer) (n.d.)

Based on the presented data, it can be concluded that global retail food sales are demonstrating consistent growth in both monetary value and physical volume (billion kg). The global food market exhibits steady growth in trade volumes from 2018 to 2029, with a projected increase of 33.8%. The largest growth is observed in the fruit and vegetable (+35.5%), dairy and egg (+31%), and specialised goods (+46.6%) categories. This reflects changing consumer preferences, increased demand for healthy eating and convenience foods, as well as the individualisation of dietary needs. The indicators forecast further growth up to 2029, attributed to both demographic factors (population growth) and increases in average income levels, urbanisation, and the diversification of demand for various product categories.

The data in Figure 2 illustrates the dynamic development of retail food sales in Ukraine from 2018 to 2029, showcasing both actual figures and projected trends. The period from 2018 to 2021 saw steady growth driven by gradual increases in household incomes, rising consumer demand, and the development of retail infrastructure, resulting in an increase in total sales from 43.32 billion USD to 58.59 billion USD. However, 2022 marked a period of sharp decline, with sales volumes dropping to 46.45 billion USD due to the war, economic instability, population migration, and the destruction of production and logistics infrastructure. A significant decline in retail food sales in Ukraine was noticeable in 2022. Specifically, sales of fruits and vegetables decreased from 12.83 billion USD in 2021 to 10.54 billion USD in 2022 (a reduction of 17.9%), meat and fish from 16.83 billion USD to 13.94 billion USD (a decrease of 17.3%), and dairy products and eggs from 9.26 billion USD to 7.16 billion USD (a reduction of 22.6%). This indicates a significant economic shock caused by the war, leading to reduced consumer spending, inflationary pressures, and disrupted logistics chains.

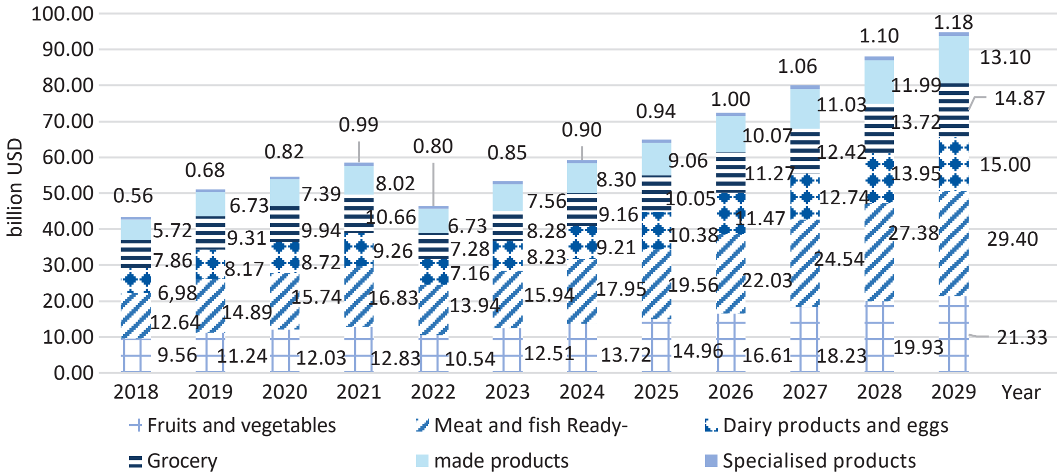

Figure 2. Retail food sales in Ukraine, billion USD

Note: 2025-2029 – forecasted data

Source: developed by the authors based on data from the Food – Ukraine (consumer) (n.d.)

However, following 2022, a recovery in sales is observed across all categories as early as 2023, indicating a gradual economic recovery, improved access to products, and stabilisation of domestic consumer demand. In 2023, the market began to recover gradually, and forecast data for 2025-2029 indicate steady growth to 94.88 billion USD by 2029, with an average annual growth rate of over 10%. The main drivers of this growth are the meat and fish categories, as well as fruits and vegetables, which demonstrate a significant increase in demand. Specifically, meat and fish sales are projected to grow by 133.2%, and fruits and vegetables by 123.5% by 2029. Dairy products, groceries, and ready-made meals also show positive momentum, although their growth is less pronounced. Specialised goods have the smallest increase, but also note a stable rise in demand. Forecasting further development to 2029, a gradual increase in retail food sales can be expected, driven by the stabilisation of the economic situation, recovery of domestic demand, and improved access to goods. However, challenges may still remain in the market, particularly due to political and economic instability, inflationary processes, and changes in consumer priorities, requiring attention from both the government and retail businesses.

Based on the conducted research on retail food sales in Ukraine and globally, the following comparisons and conclusions can be drawn. The global food market demonstrates steady growth in sales volumes; for example, from 2018 to 2029, overall figures are expected to increase from 6.32 trillion USD to a projected 12.36 trillion USD, indicating an almost doubling of the market. In Ukraine, growth rates up to 2022 were similar to global trends, but due to the impact of war and economic difficulties, a decline was observed in 2022. Since 2023, a recovery has been observed, and projected growth rates up to 2029 are expected to exceed global rates. Ukraine is experiencing rapid post-crisis growth after 2022 (53.37 billion USD in 2023 compared to 46.45 billion USD in 2022), which exceeds global averages, while the global economy demonstrates greater stability and consistent development due to more developed infrastructure and less dependence on regional conflicts. The 2029 forecast shows that the market volume in Ukraine (94.88 billion USD) will constitute about 0.8% of the global market (12.36 trillion USD), indicating significant potential for further development, particularly through adaptation to global standards and integration into international trade. Thus, the Ukrainian food market, although smaller in scale, demonstrates dynamic growth, especially in post-crisis recovery, and while reflecting global trends, retains its own regional specificities in consumer preferences.

As of 1 June 2023, the actual population according to the State Statistics Service was 32,953,432 (State Statistics Service of Ukraine, n.d.b). Therefore, since the start of the full-scale invasion, the population of Ukraine has decreased by 20%. Significant internal migration is also observed: as of May 2024, over 4.7 million internally displaced persons (IDPs) are registered in Ukraine. There is no observed trend for population increase: according to International Monetary Fund (IMF) forecasts, the population of Ukraine will only increase to 36 million by 2028 (Ukrainian food retail market..., 2024). However, even under these conditions, the sector demonstrates resilience, as food retail has been able to return to pre-war levels. As of the end of 2023, the number of operating food stores constituted 104% of the pre-war level (Unbreakable: Ukraine's retail..., 2024). The conducted analysis showed that in Ukraine, per capita income from food retail is growing at a faster rate than globally, indicating changes in consumer habits, price increases, and strengthening consumer purchasing power. The most notable differences are observed in the meat and fish and fruit and vegetable categories, which are priorities for Ukrainian consumers (Figs. 3 and 4).

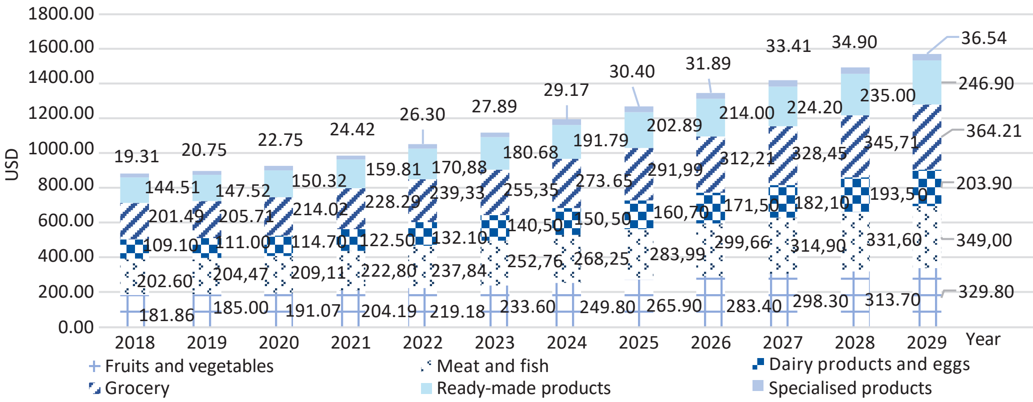

Figure 3. Average per capita income from global retail food sales, USD
Note: 2025-2029 – forecasted data
Source: developed by the authors based on data from the Food – Worldwide (consumer) (n.d.)

The higher per capita income from food retail in Ukraine compared to global figures can be attributed to several key factors. Firstly, in Ukraine, a significant portion of household expenditures is directed towards food products due to lower overall income levels and limited spending on other consumption categories, which elevates the economic role of this sector. Research indicates that the market share of essential goods exceeds 50% (Gamova *et al*., 2024). Secondly, due to the specific characteristics of the state's agricultural sector and food industry, there is a high level of local consumption of goods with higher added value, particularly meat, fish, fruits, and vegetables. According to research by O. Kovalenko & L. Yashchenko (2024), between 2012 and 2021, the average monthly consumption of food products by the population decreased across almost all food groups, except for meat products and fruits, whose consumption in the monthly diet of the population increased by 2% and 5%, respectively. Thirdly, inflationary processes, currency exchange rate fluctuations, and dependence on imports of certain products also contribute to price increases, and therefore, income in the sector. Additionally, the increasing demand for higher quality and more expensive products due to changing consumer habits, combined with increased production costs, stimulates the formation of higher income indicators than the global average.

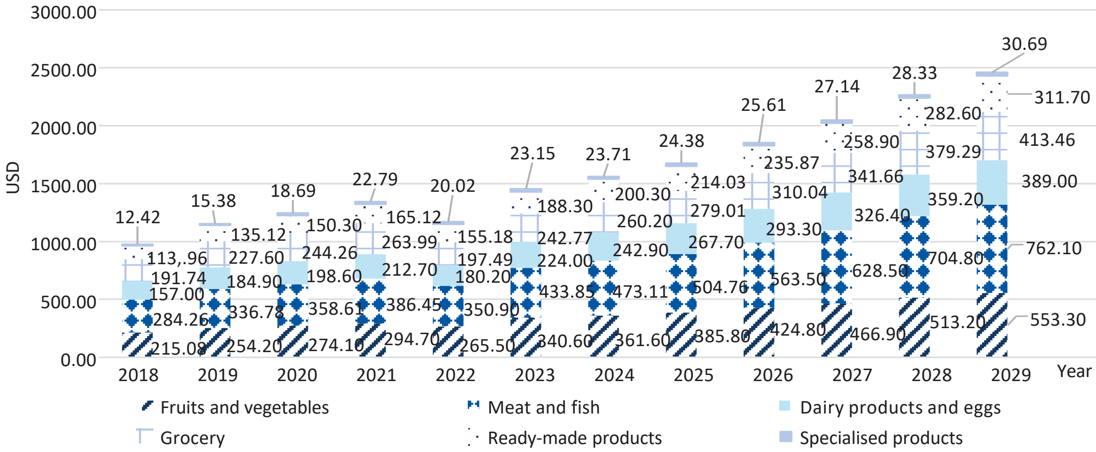

Figure 4. Average per capita income from retail food sales in Ukraine, USD
Note: 2025-2029 – forecasted data
Source: developed by the authors based on data from the Food – Ukraine (consumer) (n.d.)

Retail food sales in Ukraine are demonstrating mixed trends, notably a significant reduction in volumes in 2022 (to 12.51 billion kg) due to the economic and social consequences of the war. However, in 2023, a recovery is observed, and further steady growth in volumes to 17.11 billion kg is projected by 2029. The largest categories by volume remain bread and cereal products, vegetables, and dairy products with eggs, which hold leading positions in the Ukrainian diet. Simultaneously, the market for categories such as sauces, spices, fish, and seafood will remain relatively stable. A significant increase in demand is expected for meat, semi-finished products, and confectionery, indicating the adaptation of consumer preferences to modern trends and the growth of consumer purchasing power in the forecast period.

In the research, not only monetary but also quantitative indicators were used, which take into account the sales volume and per capita consumption of basic food products (Table 2).

Table 2. Quantitative indicators of retail food sales and food consumption in Ukraine

Product categories	Year											
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Fruits and vegetables												
Sales volume, billion kg	5.76	5.59	5.78	5.68	4.21	4.59	4.76	4.98	5.20	5.40	5.61	5.68

Table 2, Continued

Product categories	Year											
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Consumption per capita, kg	136.5	133.4	138.9	137.9	122.0	135.0	142.5	150.9	152.0	156.5	162.6	164.6
Meat and fish												
Sales volume, billion kg	2.15	2.07	2.15	2.11	1.50	1.60	1.70	1.79	1.92	2.03	2.19	2.23
Consumption per capita, kg	50.9	49.4	51.7	51.2	43.5	47.1	50.9	54.2	56.1	58.8	63.5	64.6
Dairy products and eggs												
Sales volume, billion kg	3.27	3.12	3.24	3.17	2.19	2.24	2.37	2.52	2.67	2.83	2.96	3.04
Consumption per capita, kg	77.5	74.5	77.9	76.9	63.5	65.9	71.0	76.4	78.1	82.0	85.8	88.1
Grocery												
Sales volume, billion kg	5.23	4.96	5.16	5.05	2.95	3.09	3.25	3.43	3.63	3.77	3.96	4.06
Consumption per capita, kg	123.9	118.4	124.0	122.6	85.5	90.9	97.3	103.9	106.1	109.3	114.8	117.7
Ready-made products												
Sales volume, billion kg	1.80	1.72	1.83	1.81	1.34	1.39	1.45	1.52	1.59	1.64	1.71	1.76
Consumption per capita, kg	42.7	41.1	44.0	43.9	38.8	40.9	43.4	46.1	46.5	47.5	49.6	51.0

Note: 2025-2029 – forecasted data
Source: developed by the authors based on data from the Food – Ukraine (consumer) (n.d.), State Statistics Service of Ukraine (n.d.b), IMF estimates Ukraine's population... (2024)

According to the conducted research, there is a significant decrease in the consumption level of basic food products in 2022, which is associated with the full-scale invasion of Ukraine and the resulting crises. Specifically, per capita consumption of fruits and vegetables in 2022 decreased to 122 kg, which is below the recommended norms (160-200 kg), although gradual recovery is projected in subsequent years. A similar situation is observed in the meat and fish product category: in 2022, consumption fell to 43.5 kg per person (with a norm of 80-90 kg), but by 2029, it is projected to increase to 64.6 kg. Consumption of dairy products and eggs also significantly lags behind the recommended 200-250 kg: in 2022, it decreased to 63.5 kg and may only reach 88.1 kg by 2029. The largest decline in 2022 was recorded in grocery consumption – only 85.5 kg per person, which is half the normative indicators (180-220 kg), although gradual growth is projected in the future. Analysing the trends, it can be concluded that the consumption level in Ukraine in recent years has been significantly lower than the recommended norms, and although recovery is expected, full achievement of normative values in the near future is not projected.

The recovery of online food retail is closely linked to the positive development dynamics of the offline sector. The events of 2020-2024 served as a trigger for the accelerated growth of ecommerce: in 2021, amid the coronavirus pandemic, the revenue of the Ukrainian e-commerce market in the food category reached 753.90 million USD, and in 2023, the category's revenue was 345.50 million USD. The revenue of the Ukrainian online food retail market will steadily increase over the next four years. According to Statista's forecast, a full recovery of the sector's profitability in e-commerce is expected in 2025 (Ukrainian food retail market..., 2024).

A comparison of the development dynamics of online and offline food retail in the global and Ukrainian markets reveals significant differences, particularly in growth rates and the shares occupied by each channel. The global market shows a continuous increase in the share of online sales, indicating a significant transformation of shopping in the context of globalisation and digital technology development. Specifically, in 2020, the share of online retail globally reached 5%, and by 2029, it is projected to increase to 9.9%, which is a result of e-commerce development, changing consumer behaviour, and growing trust in online stores (Fig. 5).

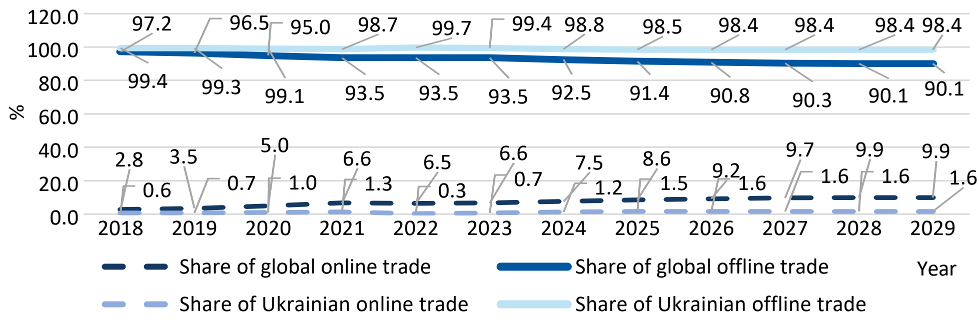

Figure 5. Share of global and Ukrainian online and offline food retail, %

Note: 2025-2029 – forecasted data

Source: developed by the authors based on data from the Food – Ukraine (ecommerce) (n.d.), Food – Worldwide (ecommerce) (n.d.)

In Ukraine, the development of online food retail lags behind global trends: online sales remain at a low level, starting from 0.6% in 2018, and only by 2029 is it projected to reach 1.6%. Although a gradual increase in the share of online retail is observed, economic, technological, and social factors, such as uneven internet access in regions, distrust of online platforms, and insufficient logistical development, significantly hinder this process. In conditions of economic instability and high competition in the offline sector, Ukrainian consumers often prefer traditional channels of food procurement, which contributes to the slow growth of the online market. Most consumers continue to make purchases in physical stores, especially in the food segment, where the ability to directly inspect the product is important.

Thus, while trends in the global market indicate a clear shift towards online sales channels, in Ukraine this is happening much more slowly due to several internal factors. In the future, with the development of infrastructure and technology, a gradual increase in the share of online retail in Ukraine is expected, but offline channels will remain the primary method of purchase for the coming years.

Table 3 reflects significant changes in the dynamics of the number of operating businesses engaged in retail food sales during 2010-2023. Overall, there is a significant reduction in the number of enterprises and individual entrepreneurs in all analysed trade segments. Specifically, in non-specialised stores, the number of enterprises decreased by 47.09%, and individual entrepreneurs by 46.23%. In specialised stores, these figures are less significant but also negative: the reduction in the number of enterprises was 16.55%, and individual entrepreneurs 15.03%. The largest drop was recorded in street stall and market trade: the number of enterprises decreased by 63.21%, and individual entrepreneurs by 63.06%. Thus, these data indicate structural changes in retail food sales, particularly a decrease in the significance of traditional distribution channels such as markets and stalls, amidst the transformation of the economic environment.

Table 3. Dynamics of the number of operating businesses in retail food sales in Ukraine, units

Indicator	Year						Absolute change from 2023 to 2010	Relative change from 2023 to 2010, %
	2010	2015	2020	2021	2022	2023		
Retail in non-specialised stores, mainly with food products, beverages and tobacco products								
Enterprises	173,900	130,922	112,324	107,111	86,642	92,013	-81,887	-47.09
of which: individual entrepreneurs	164,640	124,447	108,151	102,186	83,526	88,534	-76,106	-46.23

Table 3, Continued

Indicator	Year						Absolute change from 2023 to 2010	Relative change from 2023 to 2010, %
	2010	2015	2020	2021	2022	2023		
Retail in food products, beverages and tobacco products in specialised stores								
Enterprises	41,724	38,041	36,203	35,428	30,731	34,819	-6,905	-16.55
of which: individual entrepreneurs	40,275	37,096	35,359	34,573	30,240	34,221	-6,054	-15.03
Retail from stalls and markets with food products, beverages and tobacco products								
Enterprises	63,319	39,228	29,953	27,163	22,847	23,296	-40,023	-63.21
of which: individual entrepreneurs	62,991	39,147	29,904	27,113	22,823	23,269	-39,722	-63.06

Source: developed by the authors based on data from the State Statistics Service of Ukraine (n.d.a)

Large retail chains are gradually absorbing smaller retail operators, and the role of supermarkets and hypermarkets is growing, as evidenced by the increase in the retail space of these store formats. Among retail operators, those that sell food products are developing most dynamically (Shtal & Proskurnina, 2018). These store formats have expanded the product selection for consumers, creating more convenient shopping conditions. Supermarkets have become more accessible, which has increased their competitiveness compared to traditional markets and small stores. Hypermarkets, located on the outskirts of cities, have allowed consumers to purchase large volumes of goods at favourable prices. At the same time, chains of small specialised grocery stores have maintained their popularity, especially in small towns and rural areas (Kovalenko & Yashchenko, 2024). Among retailers specialising primarily in the sale of food products, the largest in Ukraine in 2024 were: ATB-Market, Fozzy Group (Silpo, Fora, Le Silpo), Novus, Varus, Metro Cash & Carry Ukraine, Retail Group (Velyka Kyshenia, Velmart), Tavria V, and Auchan Ukraine (ATB's revenue for the first half..., 2024).

Conducting a competitive analysis of food retailers in Ukraine was justified given the dynamic changes in the economic situation, the impact of geopolitical factors, and shifting consumer preferences, including the growing demand for environmentally friendly products and the development of online sales. Increased competition, notably through the expansion of discount chains, the entry of new players, and company mergers, necessitates an assessment of competitors' market positions and strategies. Simultaneously, the development of technologies, automation of business processes, and digitalisation create new opportunities for innovation. Additional influence is exerted by regulatory changes, including the strengthening of food safety standards and government policies. All these factors require detailed analysis to assess the strengths and weaknesses of companies, identify promising market niches, adapt to new conditions, and ensure the long-term competitiveness of retailers in the dynamic Ukrainian market.

To create a competitive analysis of the main food retailers in Ukraine, the following aspects were considered: scale and market presence (number of stores, geography); pricing policy (premium, mid-range, low segment); product range and specialisation (private label brands, exclusive goods); innovation and additional services (online stores, delivery, loyalty programmes); and financial indicators (revenue, growth rates). The findings are presented in Table 4.

Table 4. Competitive analysis of food retailers in Ukraine in 2024

Parameter	ATB-Market	Fozzy Group (Silpo, Fora)	Metro Cash & Carry	Novus	Varus	Auchan Ukraine	Retail Group Velyka Kyshenia/ Velmart	Tavria V
Number of stores	1,500+	600+	26	90+	100+	40+	40+	80+

Table 4, Continued

Parameter	ATB-Market	Fozzy Group (Silpo, Fora)	Metro Cash & Carry	Novus	Varus	Auchan Ukraine	Retail Group Velyka Kyshenia/ Velmart	Tavria V
Geography	All Ukraine	All Ukraine	Major cities	Major cities	Major cities	Major cities	Regional centres	Southern Ukraine
Pricing policy	Low segment	Mid-range, premium	Mid-range, wholesale	Mid-range, premium	Mid-range	Mid-range	Mid-range	Mid-range
Product range	Wide, Private Label	Wide, premium, exclusive	HoReCa focused	Imports, Private Label	Wide	Imports, Private Label	Wide	Local, seasonal
Innovations	Online delivery, app	App, delivery, loyalty	Business services	Delivery, app	Loyalty, promotions	Loyalty, limited delivery	Loyalty programmes	Limited
Revenue, billion UAH	97.5 (+14.3%)	64.6 (+3.3%)	12.8 (+11.2%)	13.4 (+25.9%)	9.5 (+13.9%)	6.3 (-6.2%)	5.1 (+2.0%)	6.8 (+4.5%)
Strengths	Scale, pricing	Quality, exclusivity	Wholesale, business focus	Quality, imports	Growth dynamics	Product range	Local products	Stable position in the south
Weaknesses	Limited premium	Less accessibility	Limited retail network	Small network	Locality	Network reduction	Small network	Regional market dependence

Source: developed by the authors based on data from the Ukrainian food retail market... (2024), Unbreakable: Ukraine's retail... (2024), Revenue of retail leaders in Ukraine... (2024), ATB's revenue for the first half... (2024)

Summarising the conducted research, the following general conclusions can be drawn regarding the current state of the retail market in Ukraine. The ATB network dominates in scale and low prices, attracting the economy segment. Fozzy Group, in turn, maintains stable competitive advantages in the premium segment due to high product quality and a wide range. Metro and Novus networks are positioned as retailers focused on business clients and consumers who prefer a high level of service and product quality. Varus and Velyka Kyshenia demonstrate positive development dynamics, but to strengthen their market positions, they need to expand their scale of operations. Tavria V remains a local player. Auchan remains a strong brand for buyers looking for a large selection of goods. However, its competitive position has weakened due to a reduction in market share and increased competition from fast-growing Ukrainian retailers, particularly ATB and Fozzy Group.

Among the main reasons, the following can be highlighted:

- the presence of the store in the aggressor country's market is one of the reasons for the decline in Auchan Ukraine's revenues. This can be explained by the fact that public opinion in Ukraine increasingly influences consumer behaviour, which may boycott companies with business activities in the aggressor country. This public stance causes reputational risks, which reduce customer loyalty and, consequently, the retailer's revenues. This factor is particularly important in the context of increased corporate social responsibility and patriotic sentiments of the population, which shape consumer choices;
- it is positioned as a universal supermarket, but focuses more on the mid-range segment, which is less competitive compared to ATB's low prices and Silpo's premium quality;
- it has a weaker localisation of its product range compared to Ukrainian networks.

Based on its own research, the following strategic directions are proposed to enhance the competitiveness of food retailers in Ukraine (Table 5)

Table 5. Strategic directions for enhancing the competitiveness of food retailers in Ukraine

Category	Subcategory	Specific measure
Retail innovation strategies	Digital technology implementation	Development of e-commerce platforms, mobile applications, delivery services, and use of big data for personalised customer offers
	Process automation	Installation of self-checkout tills, implementation of electronic shelf labels, automated inventory management, and demand forecasting systems
	Loyalty systems	Discount, bonus, and cashback programmes for regular customers with an emphasis on personalisation
Enhancing product quality and accessibility	Product range expansion	Engagement of local producers, development of organic product sections, gluten-free, vegan, and other specialised goods
	Quality control	Ensuring supply chain transparency, product certification, and providing consumers with information on product origins
	Competitive pricing	Optimisation of costs and engagement of suppliers with favourable cooperation terms
Infrastructure development	Optimisation of retail space	Use of multifunctional store formats (convenience stores, supermarkets, hypermarkets) that meet the needs of various consumer categories
	Location strategy	Opening stores in high-traffic locations, new residential areas, or near key transport hubs
	Eco-friendliness	Use of energy-efficient technologies, reduction of plastic use, implementation of food waste recycling policies
Expanding cooperation with local producers	Small business support	Simplifying cooperation terms with farms and micro-producers
	Development of partnership programmes	Conducting promotions to popularise local products
Corporate social responsibility and branding	Social initiatives	Participation in charitable events, providing discounts to socially vulnerable population groups
	Marketing campaigns	Use of national identity to promote Ukrainian products, emphasis on safety and quality
Staff training and management	Skill development	Continuous professional development of employees in sales, customer service, and business process management
	Employee motivation	Implementation of bonus programmes, corporate social packages, and other incentive mechanisms
Government support and regulatory measures	Tax incentives	Simplification of the tax burden for retail working with Ukrainian producers
	Subsidy programmes	Support for small and medium-sized businesses aimed at developing retail
	Antitrust policy	Ensuring fair competition among retailers
Customer orientation	Consumer preference research	Regular analysis of customer needs, satisfaction, and demands regarding prices and product ranges
	Interactivity	Use of feedback, surveys, and integration with social networks

Source: developed by the authors based on own research and study by O. Okunyeva (2012), L. Scheers (2016), N. Krasnokutska *et al.* (2019)

According to the conducted research, with the improvement of infrastructure and technology, the share of online food retail in Ukraine will gradually increase in the future. However, offline formats will remain the primary shopping channel for the coming years. This aligns with the opinion of T. Pashkuda & A. Afendi (2022), who argued that under unchanged conditions, the growth of e-commerce will continue, but it will be difficult to reach the indicators of previous periods due to occupied territories, low purchasing power of buyers, and population migration abroad. Research by I. Gamova *et al.* (2024) indicated that if the level of external threats does not increase, it is possible to forecast the achievement of the most successful year – 2019 – in this indicator only in 2026. Alongside this, it is worth noting the need to develop an innovative retail strategy, particularly e-commerce platforms for food retailers in Ukraine. This is confirmed by O. Kovalenko (2024), who argued that despite the crisis situation, another trend in the development of food retail in Ukraine was the orientation towards the European management system of modern food retail, which is defined by the key factor – the development of online retail through chain stores and own delivery services, which are becoming the main sales channels.

Enhancing the competitiveness of food retailers in Ukraine through product range expansion involves engaging local producers and developing sections for organic, gluten-free, vegan, and other specialised products. Furthermore, it includes focusing on environmental sustainability, namely through the use of energy-efficient technologies, reducing plastic usage, and implementing food waste recycling policies. O. Dankeieva (2023) noted in her research that to ensure the further sustainable development of food retail, it is necessary to develop effective scenarios for its future operations. The method of searching for development scenarios chosen in this study, the Thomas Saaty Analytical Hierarchy Process, allowed for the construction of a hierarchical representation of the problem. Among the guidelines for food retail, the following were highlighted: eco-trend, flexibility of assortment policy, and ecological relationships between retail and consumers.

One of the proposed strategic directions for enhancing the competitiveness of food retailers in Ukraine is government support and regulatory measures, which include antitrust policy. O. Nikishyna & A. Shcherbak (2023) emphasised in their research that the system of state regulation of retail should guarantee transparent and predictable conditions for conducting trade activities, ensure equal opportunities for all market participants, protect competition, prevent abuse and discrimination, and promote the development of small and medium-sized enterprises and scientific and technological progress. O. Bokiy (2023) reached similar conclusions, arguing that an effective tool of food policy aimed at overcoming modern challenges is legal regulation, as legislative acts, norms, and standards either promote or hinder the development of the economy and business activities. Another important strategic direction for enhancing the competitiveness of food retailers in Ukraine is staff training and management. As H. Guliaieva *et al*. (2024) highlighted that a weak link in trade management still remains the block of managing the formation and use of labour resources. Regarding the marketing component of the proposed strategic directions, it is advisable to use national identity to promote Ukrainian products, with an emphasis on safety and quality. N. Kosar & A. Vintoniak (2023) agreed with the importance of this approach, insisting on the formation and implementation of an effective marketing policy, which trading enterprises need to constantly adjust under the influence of changes in the factors of their marketing environment.

The conducted research complements the existing scientific knowledge base on retail food sales and provides strategic directions for enhancing the competitiveness of food retailers in Ukraine.

CONCLUSIONS

The research revealed that retail food sales in Ukraine underwent significant transformations across three key periods: pre-COVID, COVID, and the period of Russia's full-scale invasion. Before the pandemic, and even during it, the market demonstrated steady growth (from 43.32 billion USD to 58.59 billion USD in 2018-2021), driven by urbanisation and rising household incomes. The COVID-19 pandemic accelerated the development of online retail (in 2021, amid the coronavirus pandemic, the revenue of the Ukrainian e-commerce market in the food category reached 753.90 million USD), but complicated the operation of traditional stores. Russia's invasion in 2022 led to significant losses in the sector due to infrastructure destruction and reduced demand, but the adaptation of large chains helped to partially stabilise the situation. After 2023, retail food sales in Ukraine are characterised by high growth dynamics (53.37 billion USD in 2023 compared to 46.45 billion USD in 2022), despite the impact of external and internal crises. In particular, the Ukrainian market demonstrates higher recovery rates compared to global indicators, driven by postcrisis economic recovery, increased demand, and rising per capita retail sales revenues. The main factors driving the sector's development are the significant share of household spending on food products, the growth of local product consumption, especially in the meat, fish, fruit, and vegetable segments, as well as changes in consumer preferences. The projected further growth in per capita retail food sales revenues indicates a strengthening of Ukrainian purchasing power, despite the challenging demographic situation. Important aspects for further development remain adaptation to global standards, expansion of the range of quality products, support for the agricultural sector, and stabilisation of the economic environment.

The recovery of online food retail in Ukraine proves to be challenging, although there is a gradual increase in the popularity of this channel. A growth in share from 0.3% in 2022 to 1.2% in 2024 is observed, with a forecast of 1.6% in 2029. Even though globally, online sales are gaining momentum, in Ukraine this trend remains less pronounced, particularly due to economic and technological barriers. The main problem is the insufficient development of infrastructure and logistics, as well as distrust of online platforms. According to forecasts, against the backdrop of global transformation and the development of digital technologies, the Ukrainian market is expected to grow steadily, but offline channels are likely to remain dominant for several more years.

The food market in Ukraine is characterised by a variety of business entities, from large supermarket chains to small retail outlets and online platforms, which define their competitiveness through price, quality, logistics, and level of service. Key measures to enhance retailers' competitiveness include investing in innovation and technology, optimising logistics, developing loyalty programmes, implementing environmental practices, and flexibility in adapting to consumer trends. Enterprises that actively respond to market changes can strengthen their positions, ensuring sustainable growth even in a competitive environment. Further development of retail will depend on investments in infrastructure restoration, support for small businesses, the development of online trade, and adaptation to changing consumer priorities.

Prospects for further scientific research are related to the study of the development of retail in organic food products and the analysis of their impact on the human body – both beneficial and harmful.

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CONFLICT OF INTEREST

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Роздрібна торгівля харчовими товарами в Україні: від довоєнного періоду до перспектив відновлення

Анотація. Роздрібна торгівля харчовими товарами є важливим індикатором соціально-економічного стану суспільства. Її динаміка відображає рівень добробуту населення, впливає на формування податкових надходжень та демонструє тенденції розвитку економіки. Метою роботи було виявлення основних чинників, які впливають на функціонування продуктових ритейлерів, а також формулювання пропозицій щодо підвищення конкурентоспроможності роздрібних торговців харчовими товарами в Україні. Результати дослідження свідчать, що пандемія COVID-19 спричинила глобальні зрушення у структурі споживання харчових продуктів, а також стимулювала розвиток електронної торгівлі. Водночас війна в Україні спричинила різкий спад обсягів продажів через руйнування інфраструктури, економічну нестабільність та міграцію населення. Найбільше скорочення обсягів продажів спостерігалося в категоріях свіжих продуктів, таких як фрукти, овочі, м'ясо та риба. В Україні, незважаючи на негативний вплив війни, сектор харчової торгівлі виявив значну стійкість і демонструє швидке післякризове зростання, перевищуючи середньосвітові темпи. Аналіз доходу на душу населення від торгівлі харчовими товарами свідчить про зміцнення купівельної спроможності населення та зміну споживчих звичок. Особливу увагу приділено відмінностям у темпах розвитку онлайн і офлайн торгівлі, де глобальні тренди випереджають українські. Висвітлено структурні зміни в галузі, зокрема скорочення кількості малих роздрібних операторів на користь великих мереж. Конкурентний аналіз виявив, що продуктові ритейлери зосереджуються на оптимізації цінової політики, розширенні асортименту та впровадженні діджитал-рішень. Для підвищення конкурентоспроможності продуктових ритейлерів запропоновано заходи, спрямовані на вдосконалення обслуговування, розвиток онлайн-каналів продажу, диверсифікацію асортименту й інтеграцію екологічних ініціатив. Практична цінність дослідження полягає в пропизиціях стратегічних напрямів підвищення конкурентоспроможності ритейлерів харчових товарів в Україні, зокрема через впровадження інноваційних рішень, підтримку малого бізнесу та розвиток логістичної інфраструктури

Ключові слова: електронна торгівля; конкурентоспроможность; ритейлери; асортимент; інновації