



**Euromonitor  
International**

# Retail in Ukraine

April 2025

Table of Contents

## EXECUTIVE SUMMARY

Retail in 2024: The big picture

Growing preference for domestic products

Further digitalisation

What next for retail?

## OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2024

Seasonality

Christmas & New Year

## MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2019-2024

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2019-2024

Table 3 - Sales in Retail Offline by Channel: Value 2019-2024

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2019-2024

Table 5 - Retail Offline Outlets by Channel: Units 2019-2024

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2019-2024

Table 7 - Sales in Retail E-Commerce by Product: Value 2019-2024

Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2019-2024

Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 11 - Sales in Grocery Retailers by Channel: Value 2019-2024

Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2019-2024

Table 13 - Grocery Retailers Outlets by Channel: Units 2019-2024

Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2019-2024

Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2019-2024

Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2019-2024

Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 21 - Retail GBO Company Shares: % Value 2020-2024

Table 22 - Retail GBN Brand Shares: % Value 2021-2024

Table 23 - Retail Offline GBO Company Shares: % Value 2020-2024

Table 24 - Retail Offline GBN Brand Shares: % Value 2021-2024

Table 25 - Retail Offline LBN Brand Shares: Outlets 2021-2024

Table 26 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 28 - Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 29 - Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2024-2029

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2024-2029

Table 36 - Forecast Sales in Retail Offline by Channel: Value 2024-2029

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2024-2029

Table 38 - Forecast Retail Offline Outlets by Channel: Units 2024-2029

Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2024-2029

Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2024-2029

Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2024-2029

Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2024-2029

Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2024-2029

Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2024-2029

Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2024-2029

Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2024-2029

Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2024-2029

Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Convenience retailers quick to adapt
- Evolution to key community hubs
- Diversity of payment options ensures broad consumer base

PROSPECTS AND OPPORTUNITIES

- Further growth anticipated
- Private label to play key role
- Growing role for autonomous vending technology

CHANNEL DATA

Table 54 - Convenience Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 55 - Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 56 - Sales in Convenience Retailers by Channel: Value 2019-2024

Table 57 - Sales in Convenience Retailers by Channel: % Value Growth 2019-2024

Table 58 - Convenience Retailers GBO Company Shares: % Value 2020-2024

Table 59 - Convenience Retailers GBN Brand Shares: % Value 2021-2024

Table 60 - Convenience Retailers LBN Brand Shares: Outlets 2021-2024

Table 61 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 62 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 63 - Forecast Sales in Convenience Retailers by Channel: Value 2024-2029

Table 64 - Forecast Sales in Convenience Retailers by Channel: % Value Growth 2024-2029

Supermarkets in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Players work to retain customers in challenging environment

Supermarkets players forced to optimise product mix and shelf space

Move towards omnichannel strategies

## PROSPECTS AND OPPORTUNITIES

Ongoing focus on price

New formats and potential for subscription-based shopping

Sustainability and food security

## CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2019-2024

Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 67 - Supermarkets GBO Company Shares: % Value 2020-2024

Table 68 - Supermarkets GBN Brand Shares: % Value 2021-2024

Table 69 - Supermarkets LBN Brand Shares: Outlets 2021-2024

Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

## Hypermarkets in Ukraine

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Exploration of smaller formats

Challenging environment

Adaptation and online development

## PROSPECTS AND OPPORTUNITIES

Further refinement expected

Potential move towards hybrid formats

Focus on urban centres and regional models

## CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2019-2024

Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 74 - Hypermarkets GBO Company Shares: % Value 2020-2024

Table 75 - Hypermarkets GBN Brand Shares: % Value 2021-2024

Table 76 - Hypermarkets LBN Brand Shares: Outlets 2021-2024

Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

## Small Local Grocers in Ukraine

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Losing out to more modern formats

Growing competition from convenience stores

Owners struggle

## PROSPECTS AND OPPORTUNITIES

Challenges set to persist even as market conditions improve

Enduring importance

Potential changes in policy and regulations

## CHANNEL DATA

Table 79 - Small Local Grocers: Value Sales, Outlets and Selling Space 2019-2024

Table 80 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 81 - Small Local Grocers GBO Company Shares: % Value 2020-2024

Table 82 - Small Local Grocers GBN Brand Shares: % Value 2021-2024

Table 83 - Small Local Grocers LBN Brand Shares: Outlets 2021-2024

Table 84 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 85 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

## General Merchandise Stores in Ukraine

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Variety stores dominate

Spending shifts towards value-oriented products

Dynamic competitive environment

### PROSPECTS AND OPPORTUNITIES

Ongoing challenges for department stores

Variety stores in line with evolving consumer focus

Important role for digital integration

### CHANNEL DATA

Table 86 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2019-2024

Table 87 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 88 - Sales in General Merchandise Stores by Channel: Value 2019-2024

Table 89 - Sales in General Merchandise Stores by Channel: % Value Growth 2019-2024

Table 90 - General Merchandise Stores GBO Company Shares: % Value 2020-2024

Table 91 - General Merchandise Stores GBN Brand Shares: % Value 2021-2024

Table 92 - General Merchandise Stores LBN Brand Shares: Outlets 2021-2024

Table 93 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 94 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 95 - Forecast Sales in General Merchandise Stores by Channel: Value 2024-2029

Table 96 - Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2024-2029

## Apparel and Footwear Specialists in Ukraine

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Store openings

International brands face challenges

Crucial role for omnichannel approaches

### PROSPECTS AND OPPORTUNITIES

Online platforms becoming key

More store re-openings expected, with new mall offering opportunities

War shaping consumer preferences and retailer strategies

### CHANNEL DATA

Table 97 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 98 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 99 - Apparel and Footwear Specialists GBO Company Shares: % Value 2020-2024

Table 100 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2021-2024

Table 101 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2021-2024

Table 102 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 103 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

## Appliances and Electronics Specialists in Ukraine

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Development despite macroeconomic challenges

Ongoing supply chain disruptions

E-commerce continues to grow in importance

#### PROSPECTS AND OPPORTUNITIES

Growing emphasis on energy efficiency

Shift to omnichannel approaches

Refurbished products, trade-ins and smart devices

#### CHANNEL DATA

Table 104 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 105 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 106 - Appliances and Electronics Specialists GBO Company Shares: % Value 2020-2024

Table 107 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2021-2024

Table 108 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2021-2024

Table 109 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 110 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

## Home Products Specialists in Ukraine

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

New stores and new concepts

Focus on energy efficiency

Ongoing digitalisation

#### PROSPECTS AND OPPORTUNITIES

Pricing to remain a key consideration

Ongoing influence of digitalisation

Increasing interest in sustainability

#### CHANNEL DATA

Table 111 - Home Products Specialists: Value Sales, Outlets and Selling Space 2019-2024

Table 112 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 113 - Sales in Home Products Specialists by Channel: Value 2019-2024

Table 114 - Sales in Home Products Specialists by Channel: % Value Growth 2019-2024

Table 115 - Home Products Specialists GBO Company Shares: % Value 2020-2024

Table 116 - Home Products Specialists GBN Brand Shares: % Value 2021-2024

Table 117 - Home Products Specialists LBN Brand Shares: Outlets 2021-2024

Table 118 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 119 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 120 - Forecast Sales in Home Products Specialists by Channel: Value 2024-2029

Table 121 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2024-2029

Health and Beauty Specialists in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Innovation and expansion of the offer
- Health and wellness trend supports expansion of pharmacies
- Development of local brands, private label and online sales

PROSPECTS AND OPPORTUNITIES

- Store openings and pursuit of omnichannel strategies
- Ongoing digitalisation
- Ethical consumerism to exert growing influence

CHANNEL DATA

- Table 122 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2019-2024
- Table 123 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 124 - Sales in Health and Beauty Specialists by Channel: Value 2019-2024
- Table 125 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2019-2024
- Table 126 - Health and Beauty Specialists GBO Company Shares: % Value 2020-2024
- Table 127 - Health and Beauty Specialists GBN Brand Shares: % Value 2021-2024
- Table 128 - Health and Beauty Specialists LBN Brand Shares: Outlets 2021-2024
- Table 129 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 130 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 131 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2024-2029
- Table 132 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2024-2029

Vending in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Diversification of product offer and emphasis on high-traffic areas
- Shift in consumer preferences
- War drives shift in product offer

PROSPECTS AND OPPORTUNITIES

- Digital developments to support further growth
- Potential for development of fresh food vending
- Upmarket opportunities in vending

CHANNEL DATA

- Table 133 - Vending by Product: Value 2019-2024
- Table 134 - Vending by Product: % Value Growth 2019-2024
- Table 135 - Vending GBO Company Shares: % Value 2020-2024
- Table 136 - Vending GBN Brand Shares: % Value 2021-2024
- Table 137 - Vending Forecasts by Product: Value 2024-2029
- Table 138 - Vending Forecasts by Product: % Value Growth 2024-2029

Direct Selling in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Direct selling remains resilient

Social character of direct selling supports sales

Digital transformation of direct selling

## PROSPECTS AND OPPORTUNITIES

Direct selling benefits from reaching consumers underserved by other channels

Hybrid models set to dominate

Increasing influence of ethical consumerism

## CHANNEL DATA

Table 139 - Direct Selling by Product: Value 2019-2024

Table 140 - Direct Selling by Product: % Value Growth 2019-2024

Table 141 - Direct Selling GBO Company Shares: % Value 2020-2024

Table 142 - Direct Selling GBN Brand Shares: % Value 2021-2024

Table 143 - Direct Selling Forecasts by Product: Value 2024-2029

Table 144 - Direct Selling Forecasts by Product: % Value Growth 2024-2029

## Retail E-Commerce in Ukraine

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Shift towards m-commerce

E-commerce benefits from broader digitalisation

Rozetka retains lead, while players focus on enhancing delivery

## PROSPECTS AND OPPORTUNITIES

Central role for cross-border trade

Significant role for m-commerce and s-commerce

Delivery services key to competitiveness

## CHANNEL DATA

Table 145 - Retail E-Commerce by Channel: Value 2019-2024

Table 146 - Retail E-Commerce by Channel: % Value Growth 2019-2024

Table 147 - Retail E-Commerce by Product: Value 2019-2024

Table 148 - Retail E-Commerce by Product: % Value Growth 2019-2024

Table 149 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 150 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 151 - Forecast Retail E-Commerce by Channel: Value 2024-2029

Table 152 - Forecast Retail E-Commerce by Channel: % Value Growth 2024-2029

Table 153 - Forecast Retail E-Commerce by Product: Value 2024-2029

Table 154 - Forecast Retail E-Commerce by Product: % Value Growth 2024-2029

## 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).